

nsta

Nova Scotia
Tourism Agency

Research

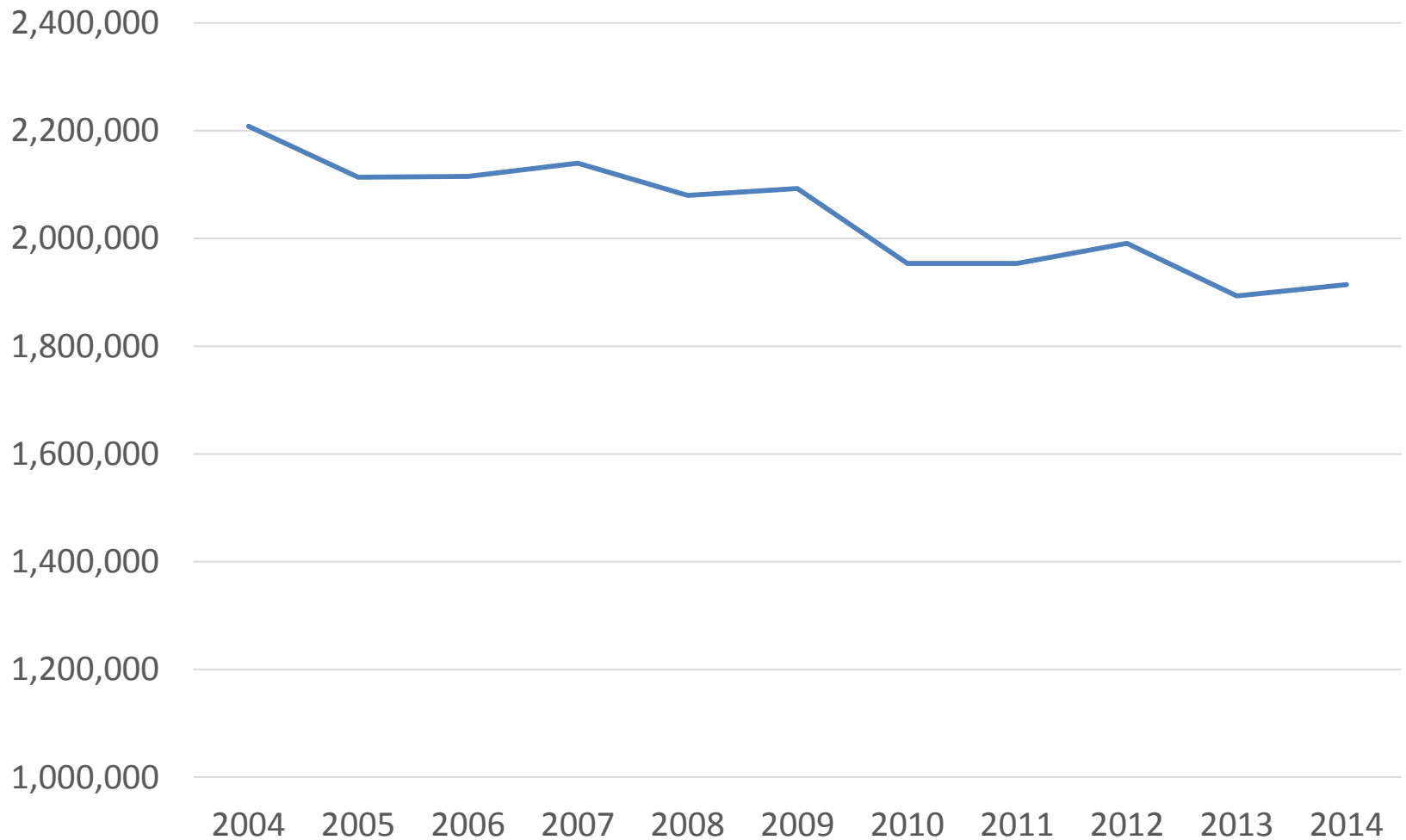


What We Do

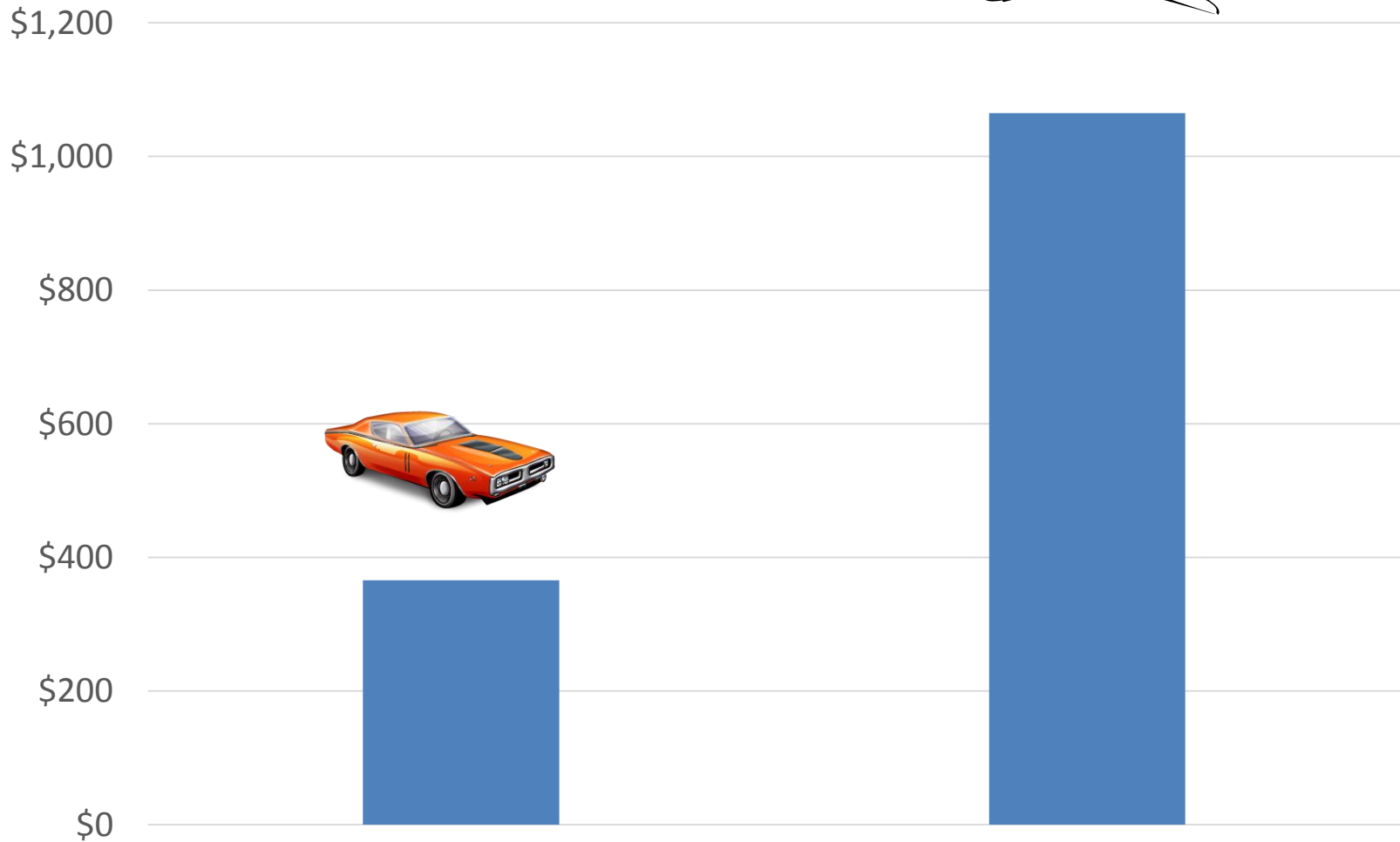
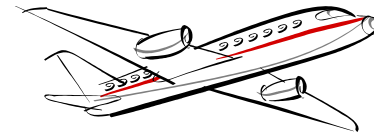
- Monthly tourism indicators.
 - Overnight visitors by mode and origin
 - Accommodations by region
 - Cruise visitors
 - Visitors counselled
 - Attendance at key provincial attractions
- Primary and secondary research to inform marketing strategy.
 - Brand health
 - Travel motivations
 - Travel planning decision making and process
 - Identification of high potential markets
 - Nova Scotia Tourism Online Advisory Panel
- Tourism revenue estimates.

Visitation

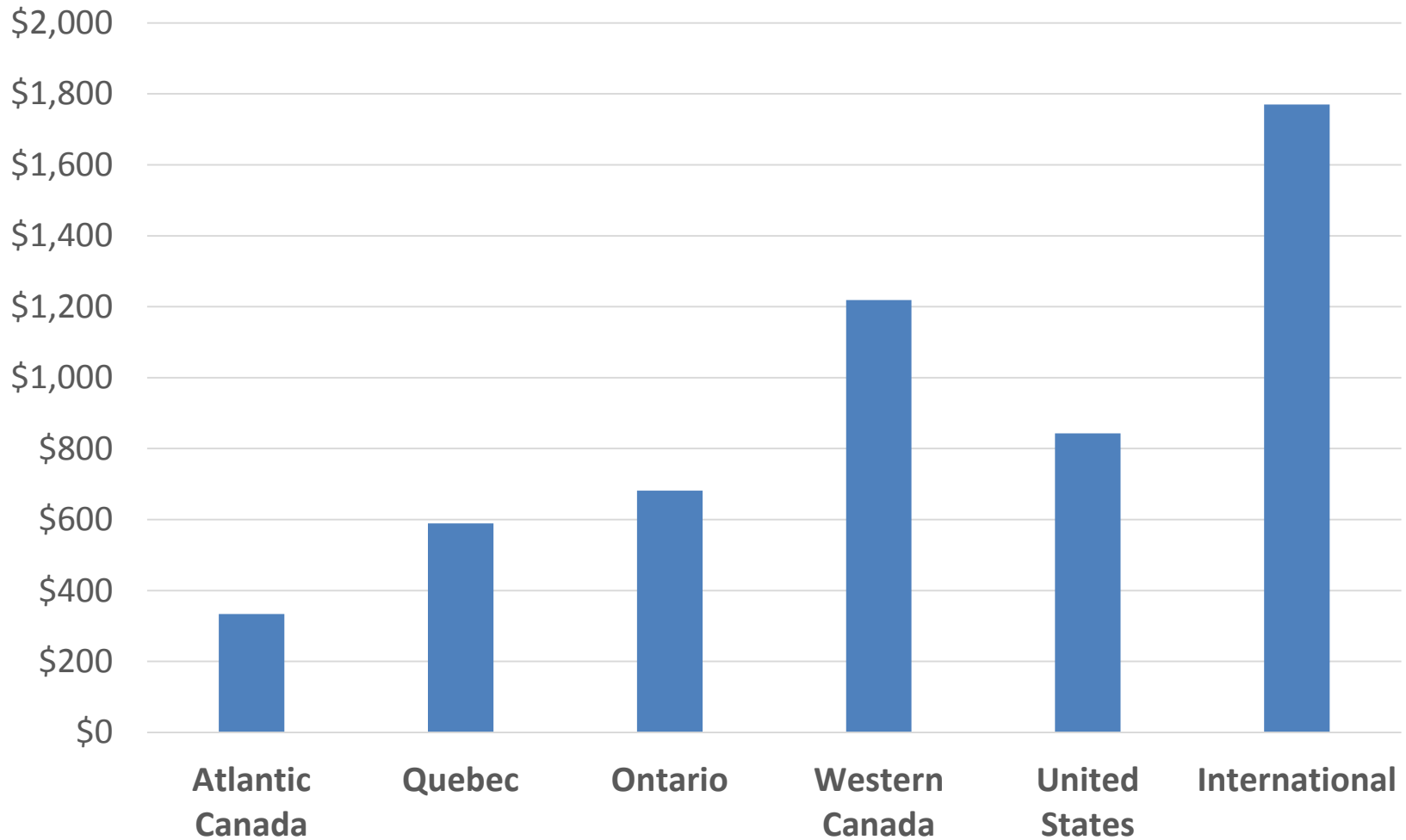
Overnight Visitors to Nova Scotia



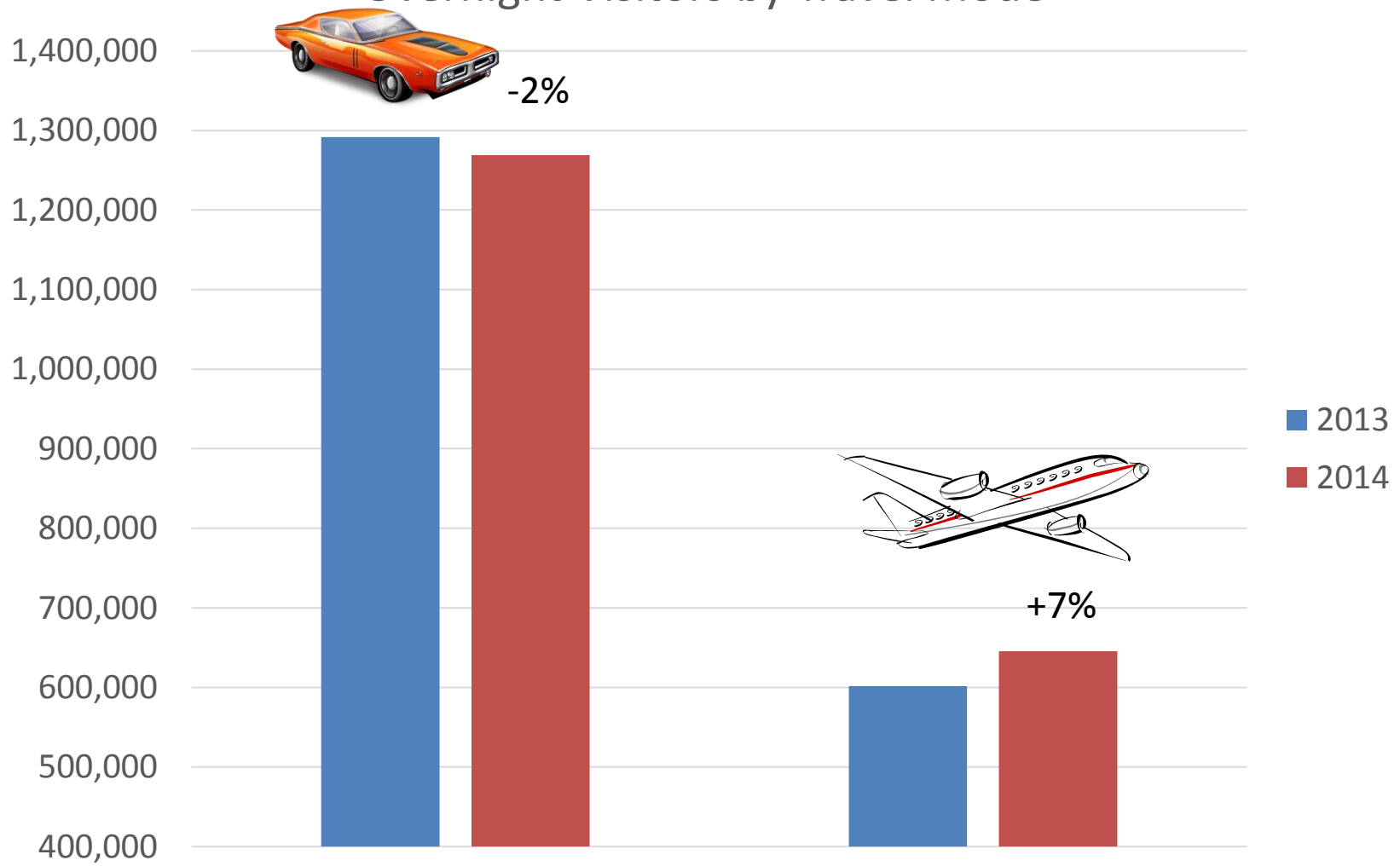
Visitor Spending



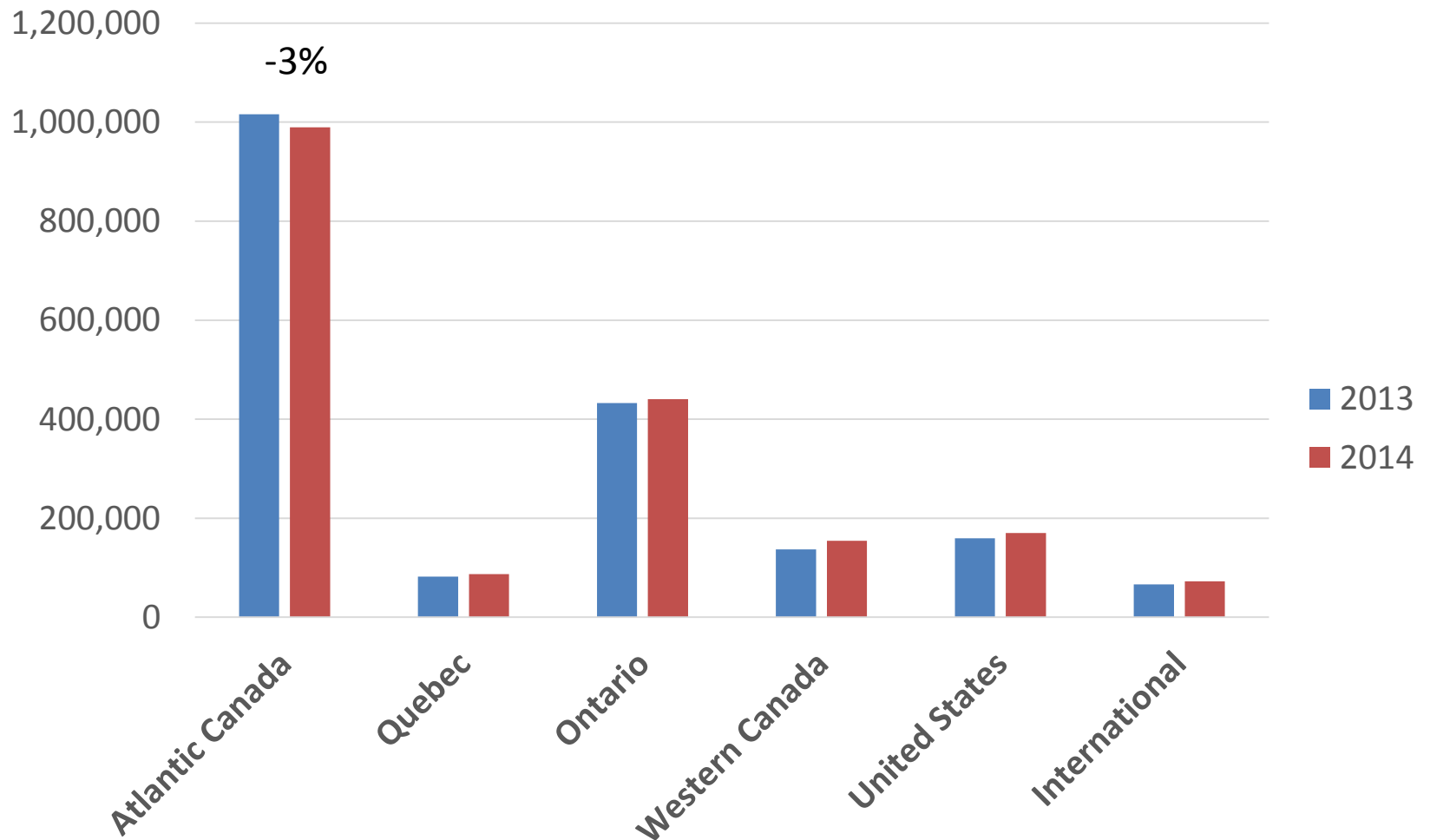
Visitor Spending



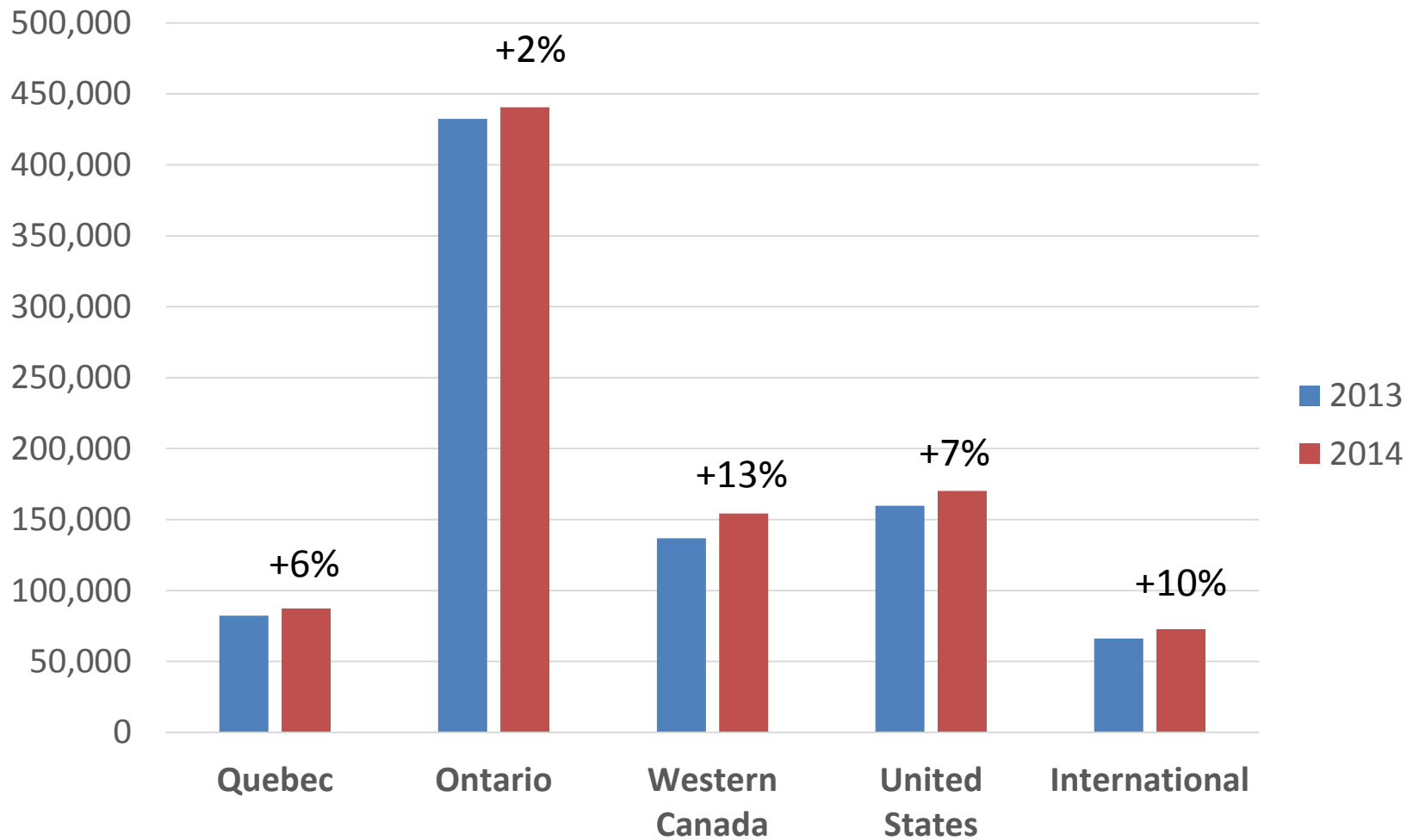
Overnight Visitors by Travel Mode



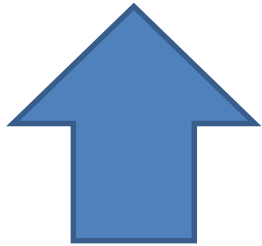
Overnight Visitors by Origin



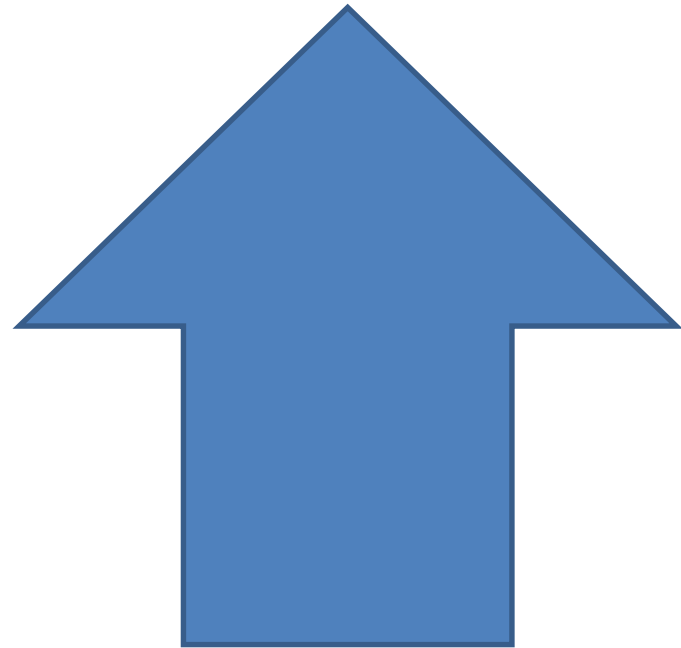
Overnight Visitors by Origin



**1% increase in
visitation**

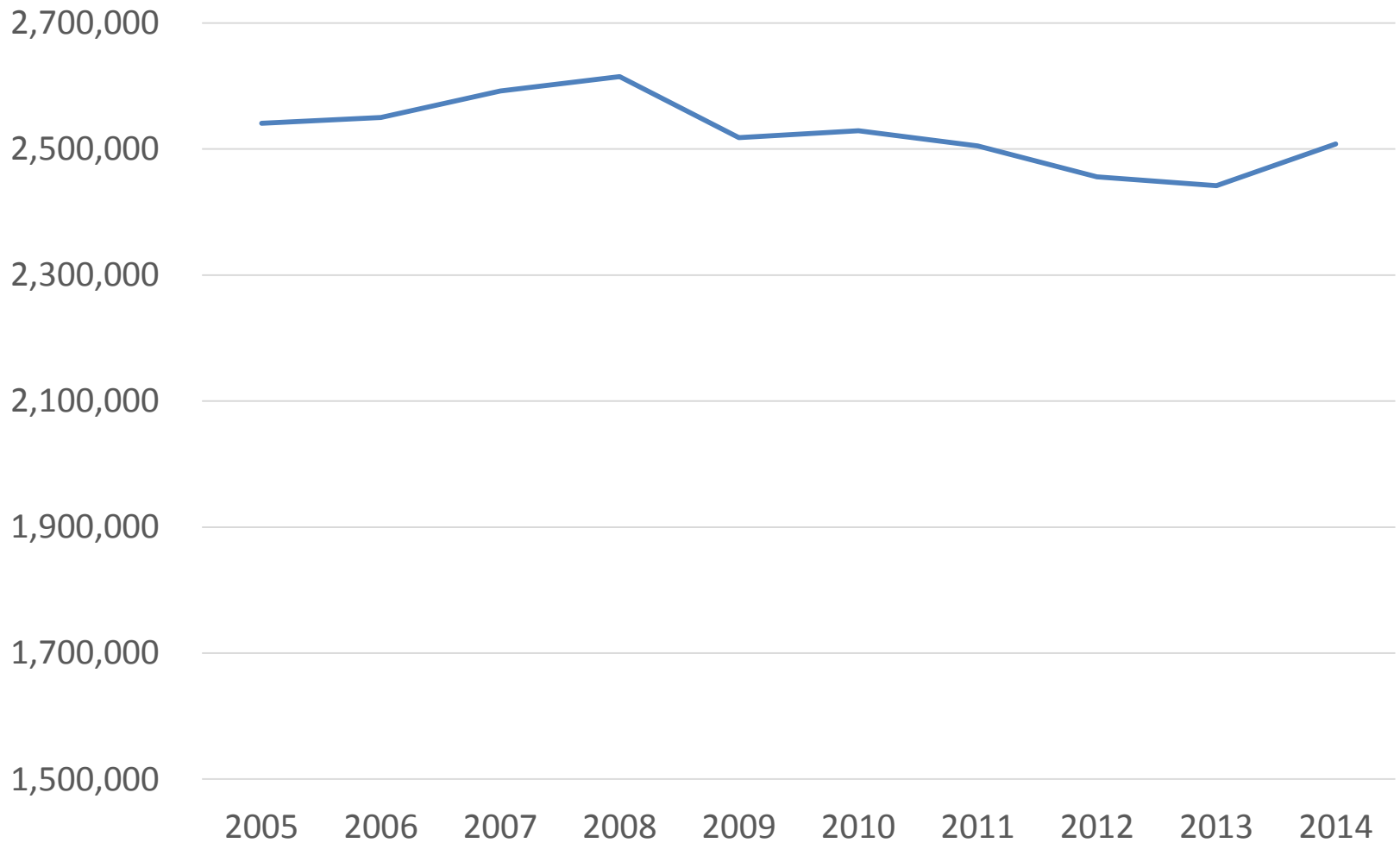


**4% increase in
tourism
spending**

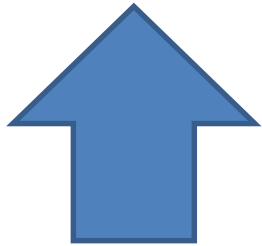


Accommodations

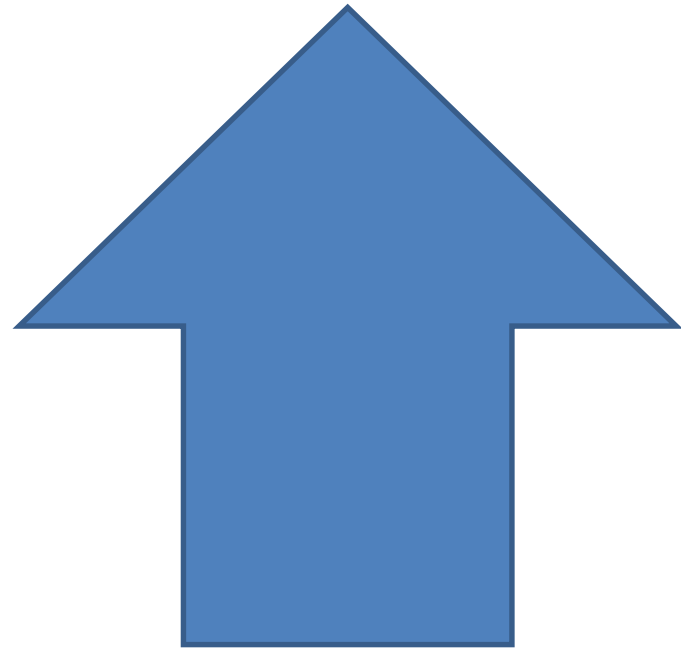
Nova Scotia Room Nights Sold

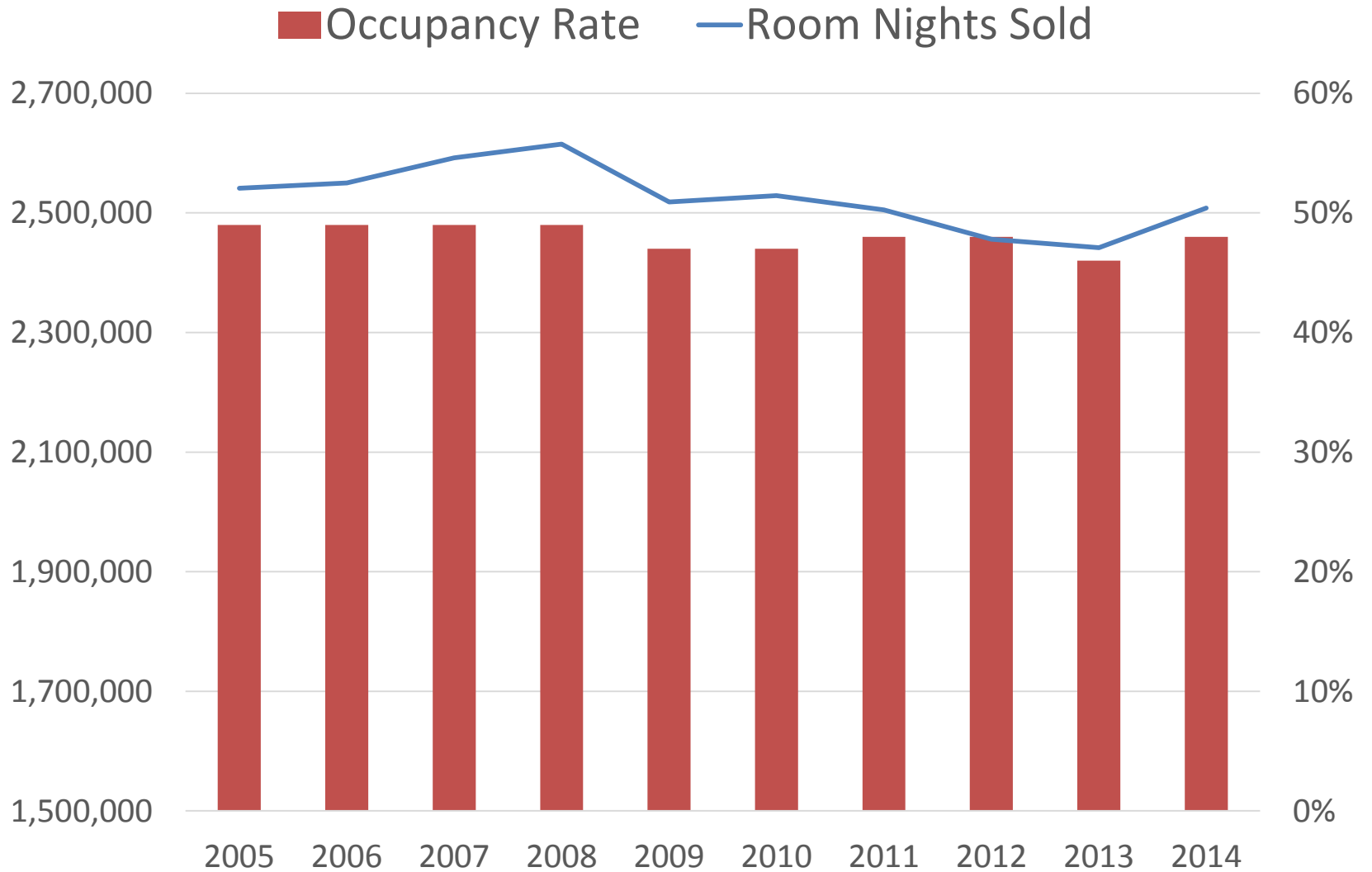


**1% increase in
visitation**

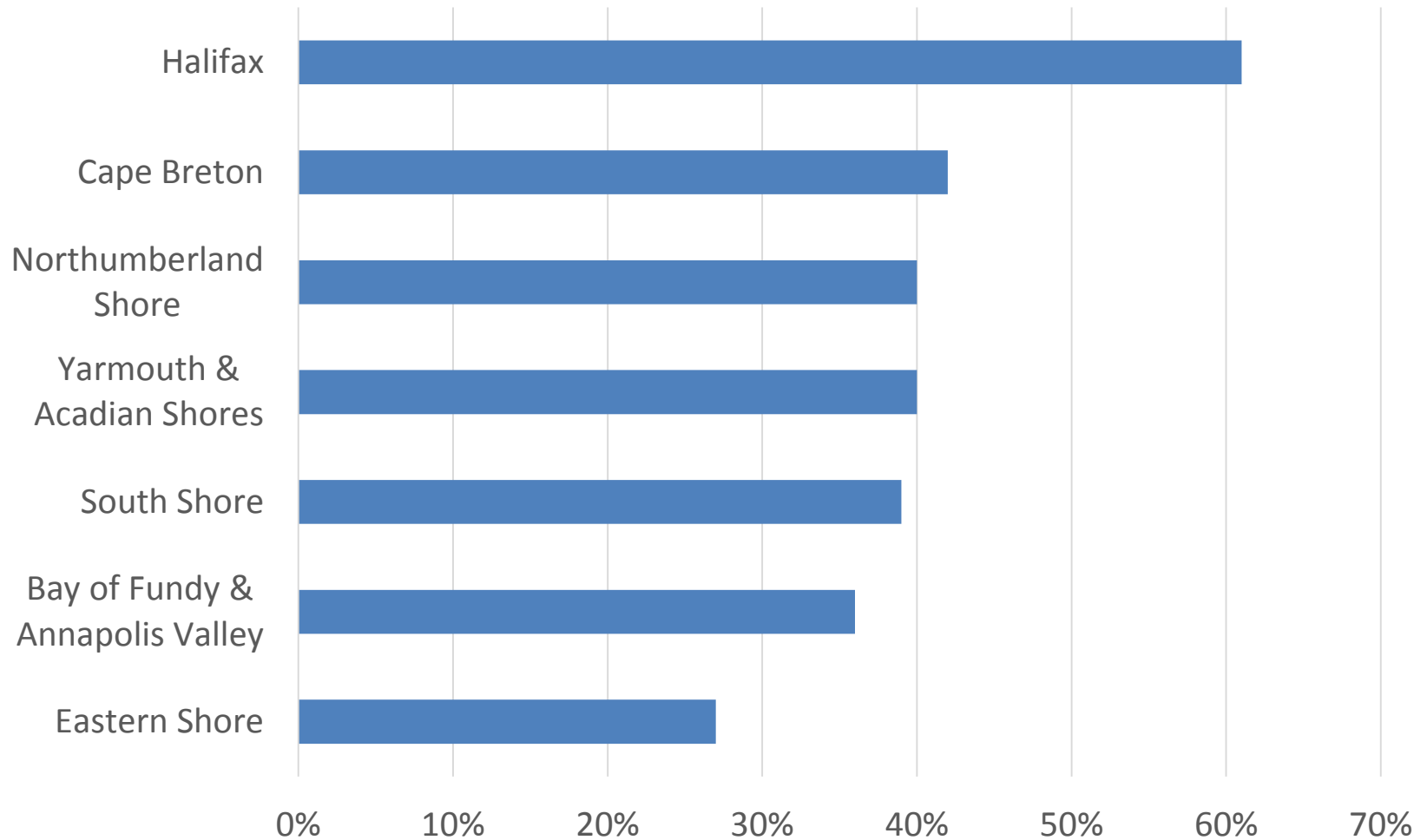


**3% increase in
room nights
sold**



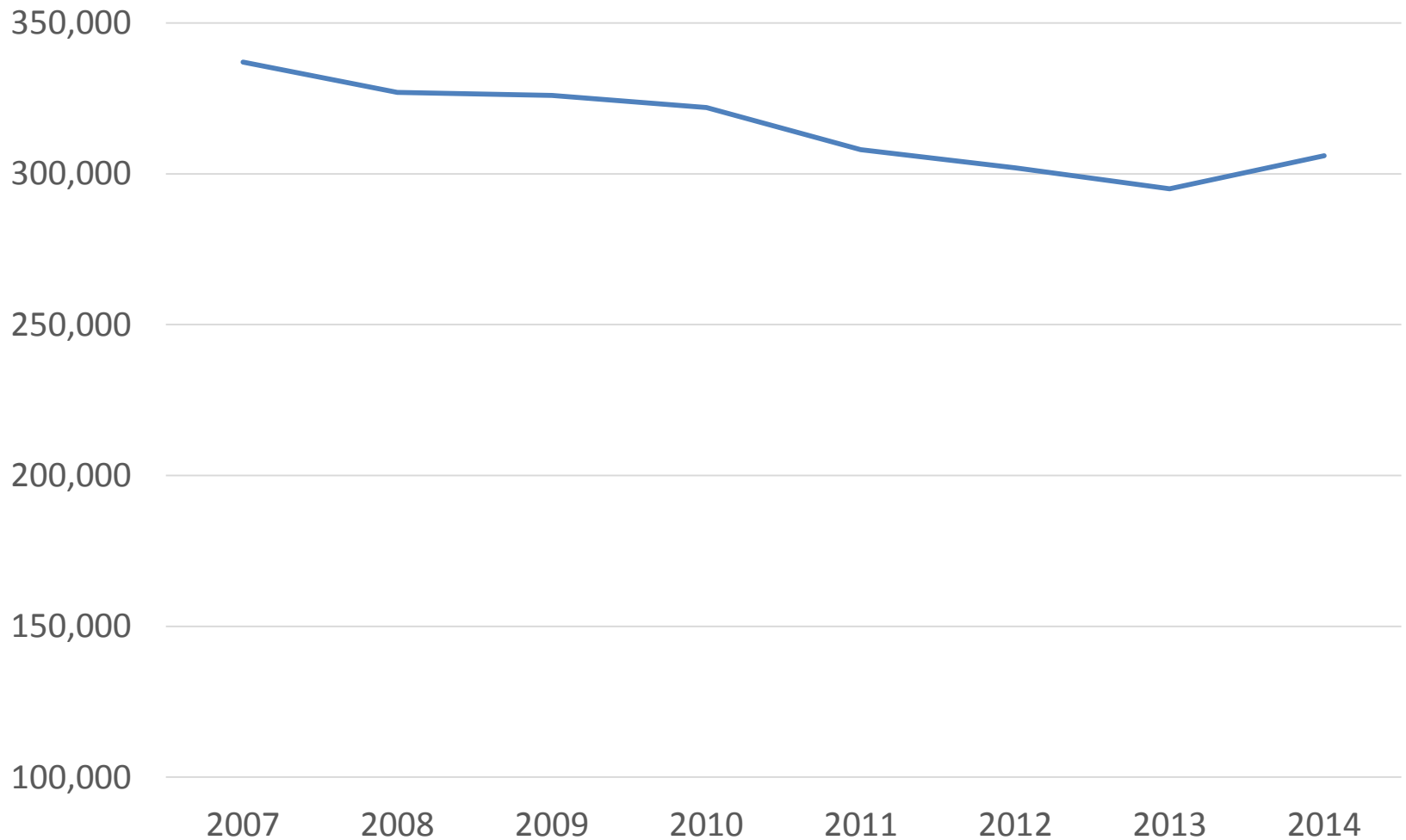


2014 Occupancy Rate

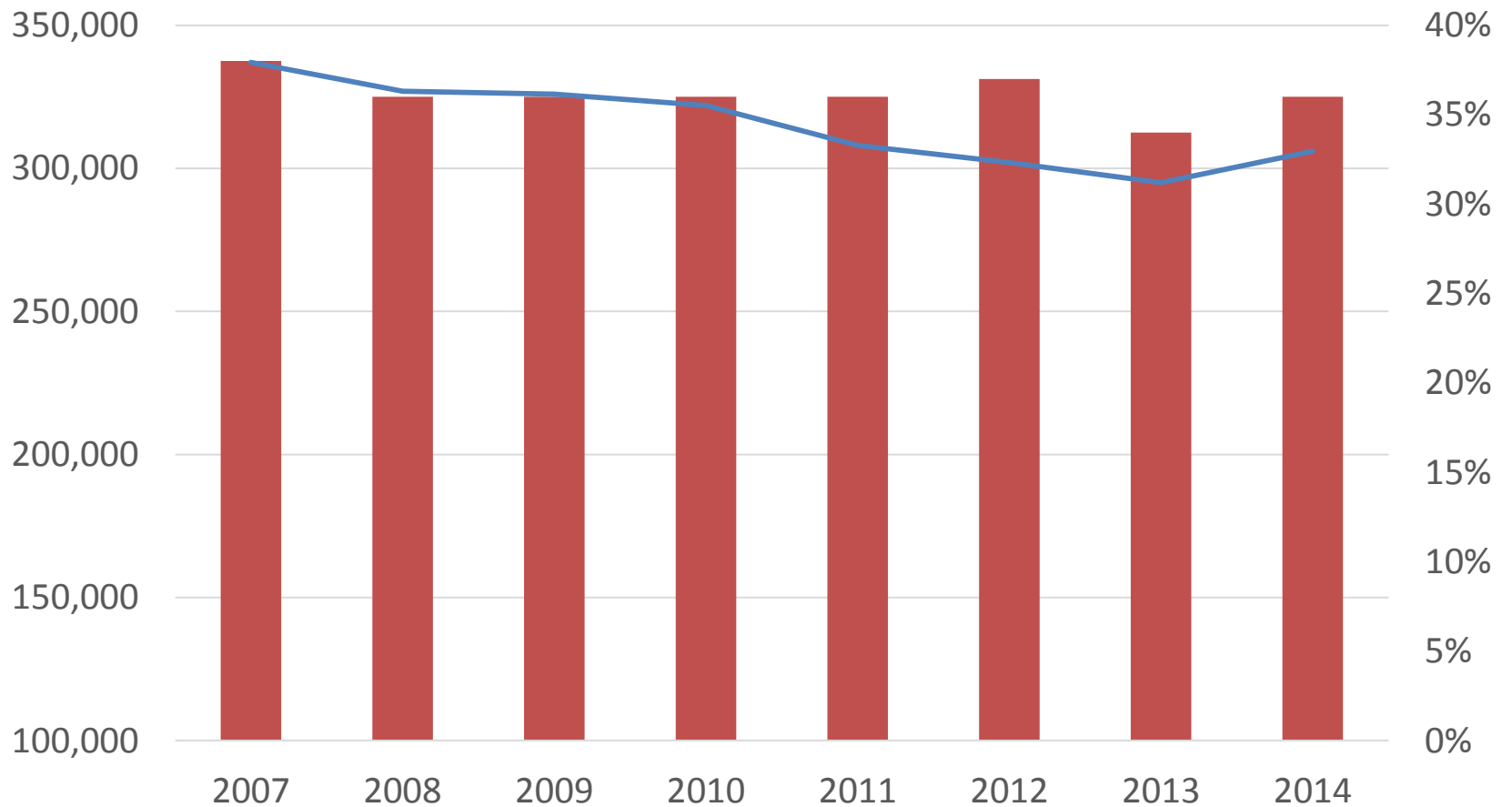


Fundy Shore & Annapolis Valley

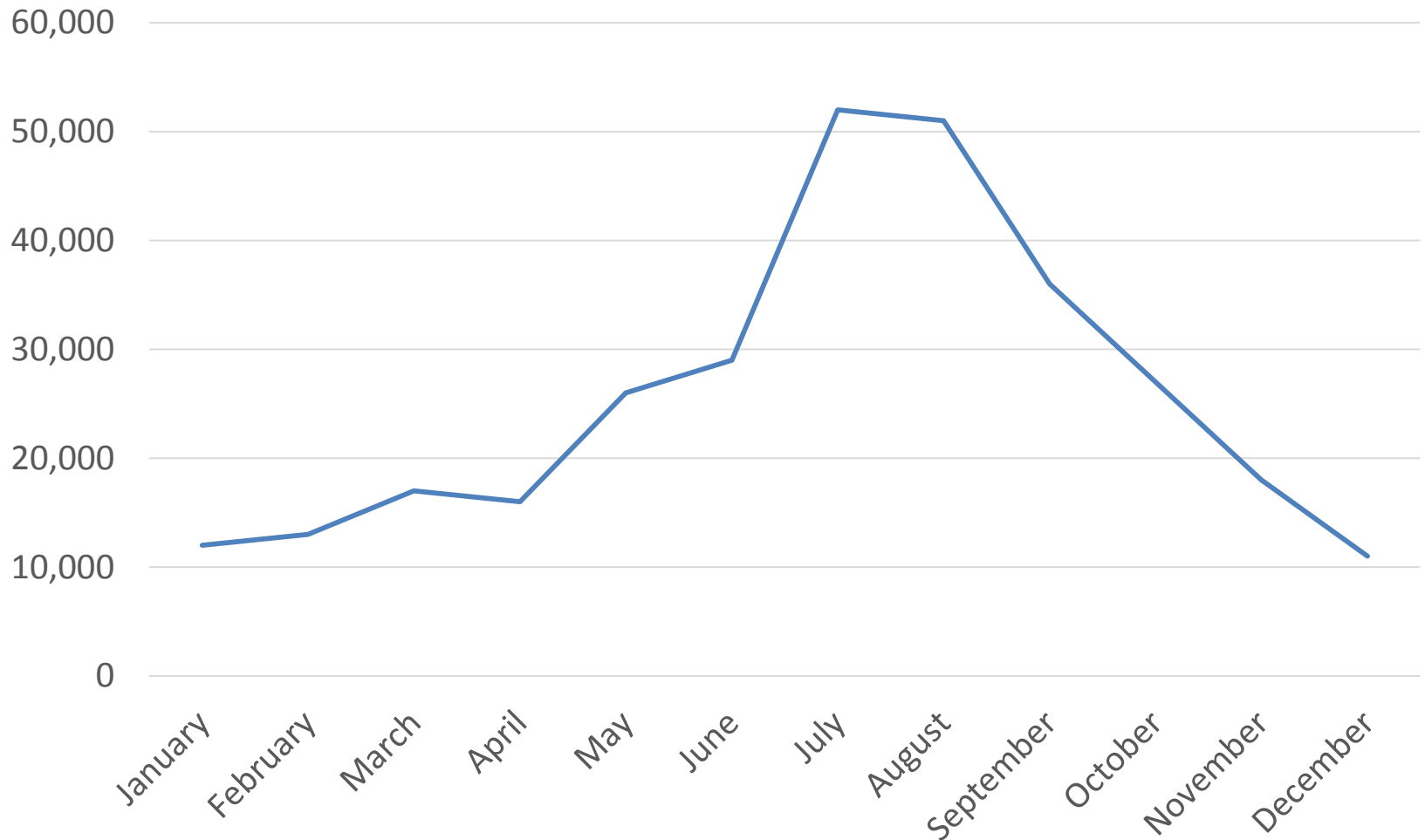
Fundy Shore & Annapolis Valley Room Nights Sold



■ Occupancy Rate
— Fundy Shore & Annapolis Valley Room Nights Sold

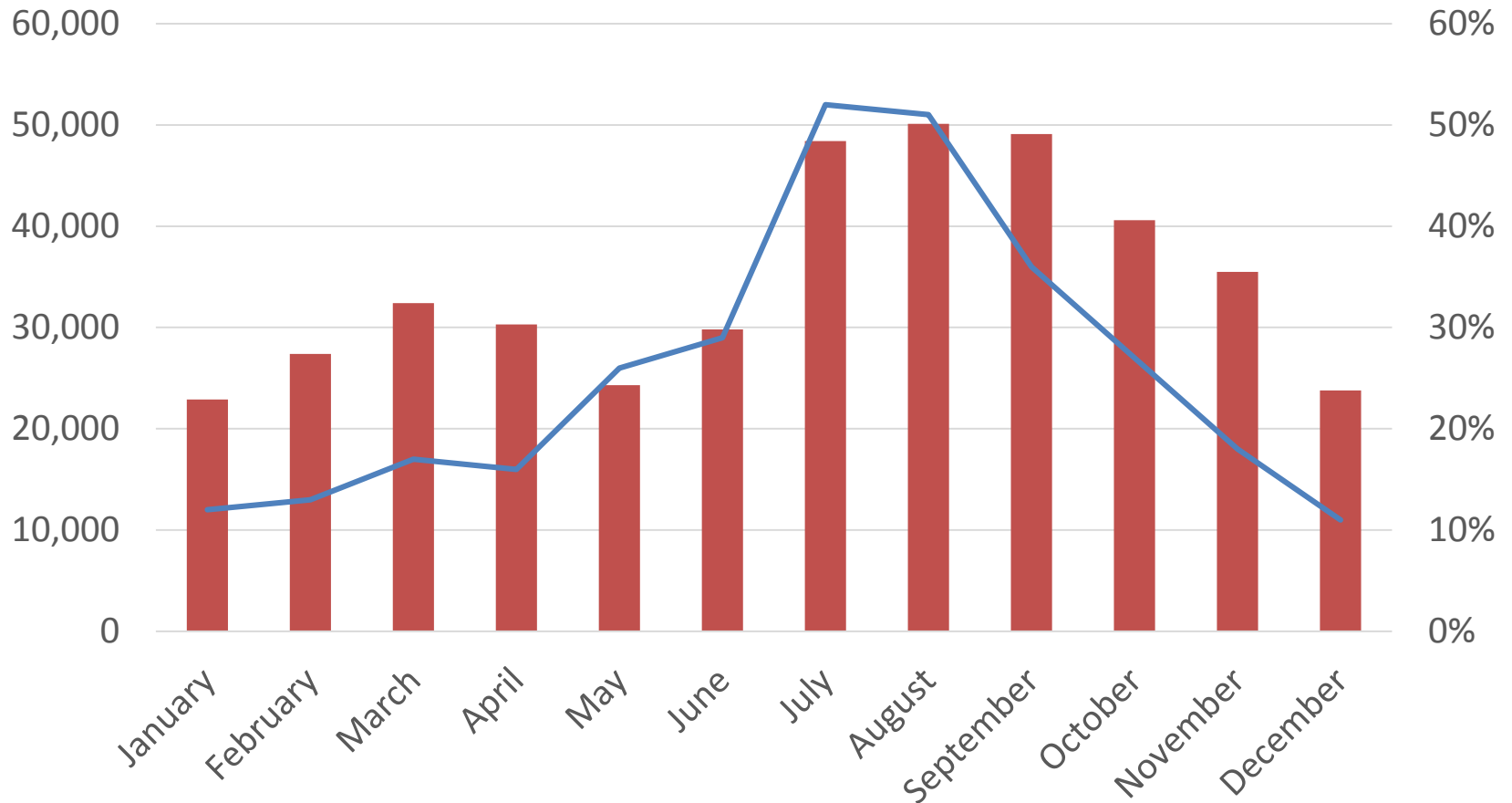


— 2014 Fundy Shore & Annapolis Valley Room Nights Sold



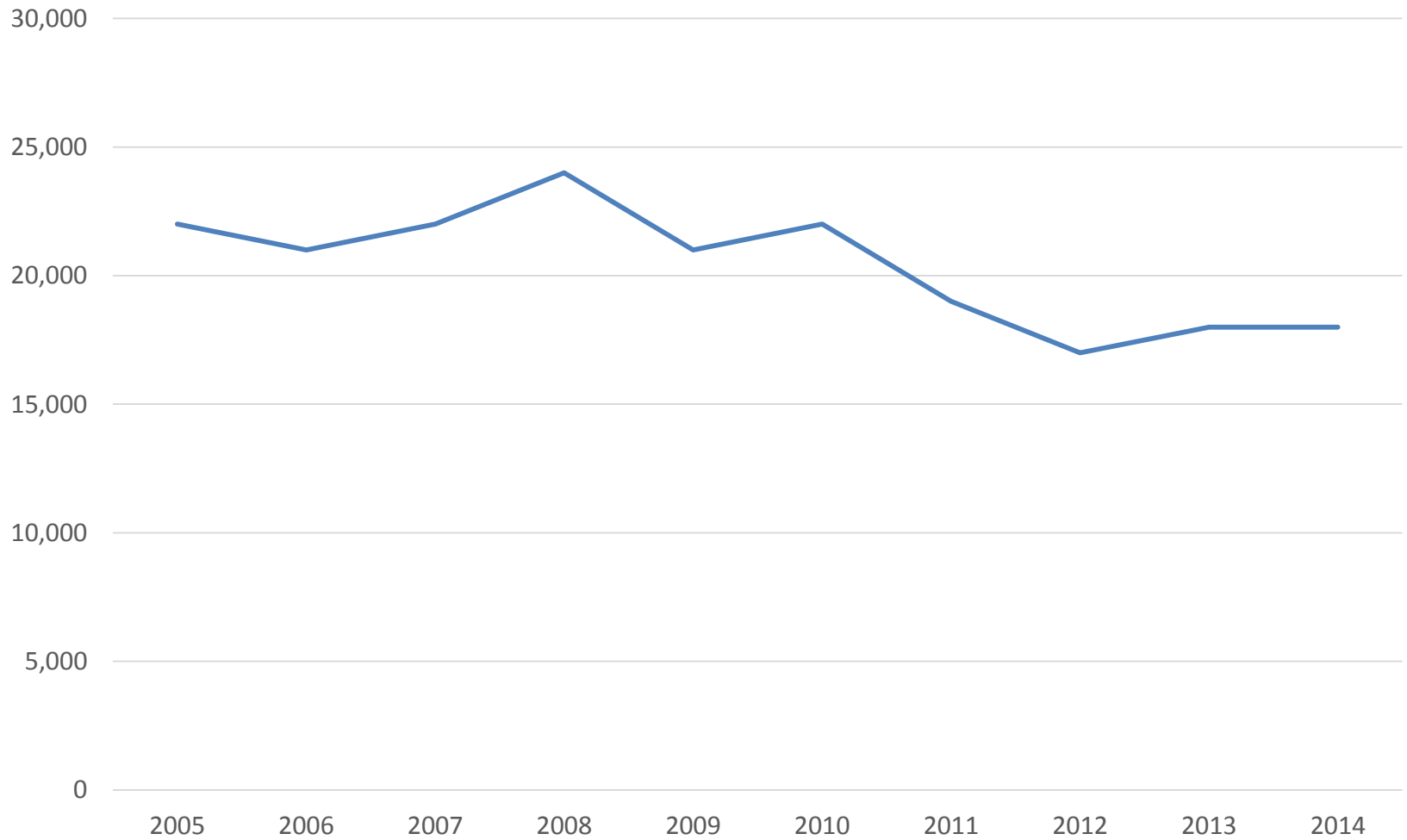
■ Occupancy Rate

— 2014 Fundy Shore & Annapolis Valley Room Nights Sold

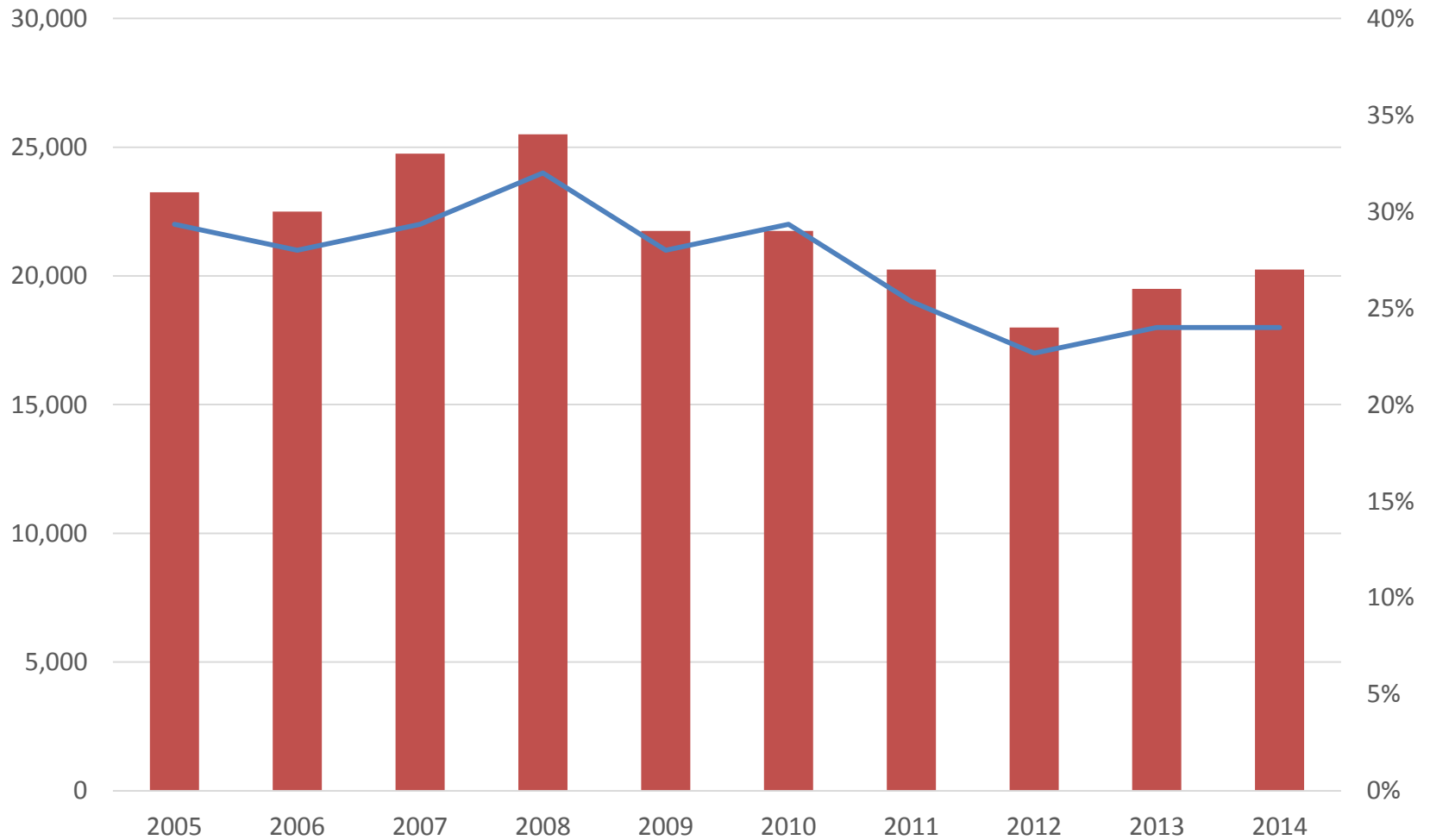


Eastern Shore

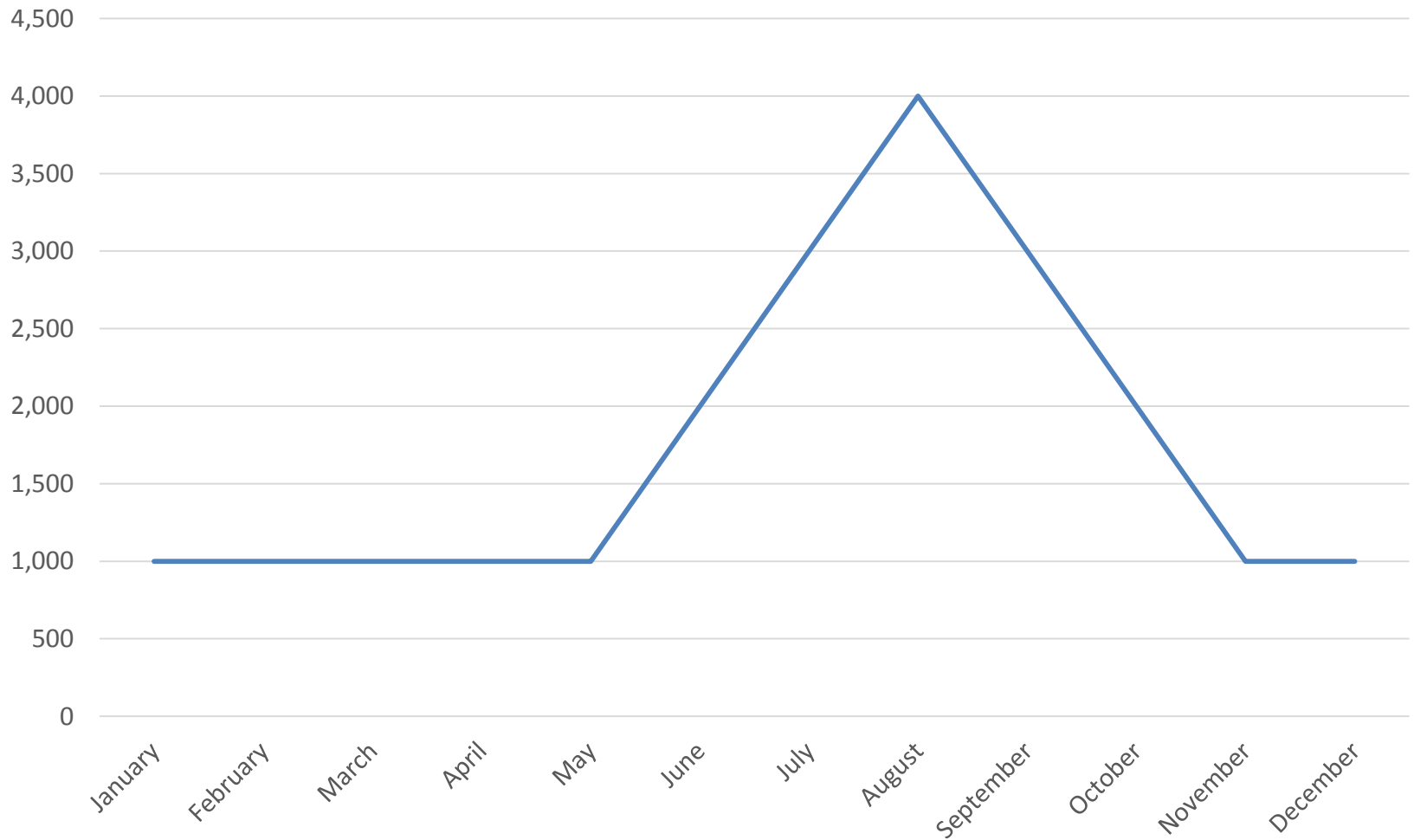
— Eastern Shore Room Nights Sold



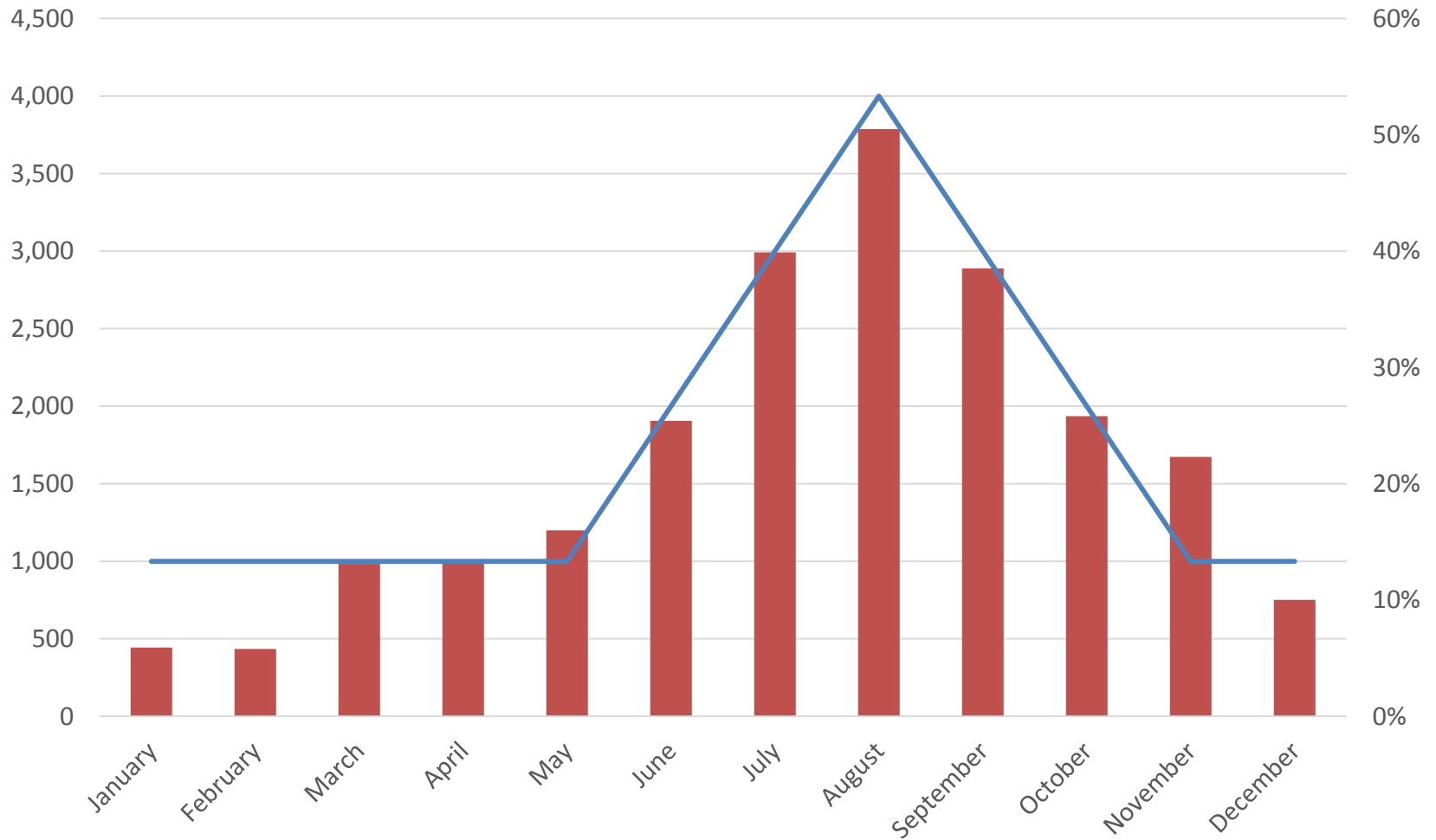
■ Occupancy Rate — Eastern Shore Room Nights Sold



— 2014 Eastern Shore Room Nights Sold

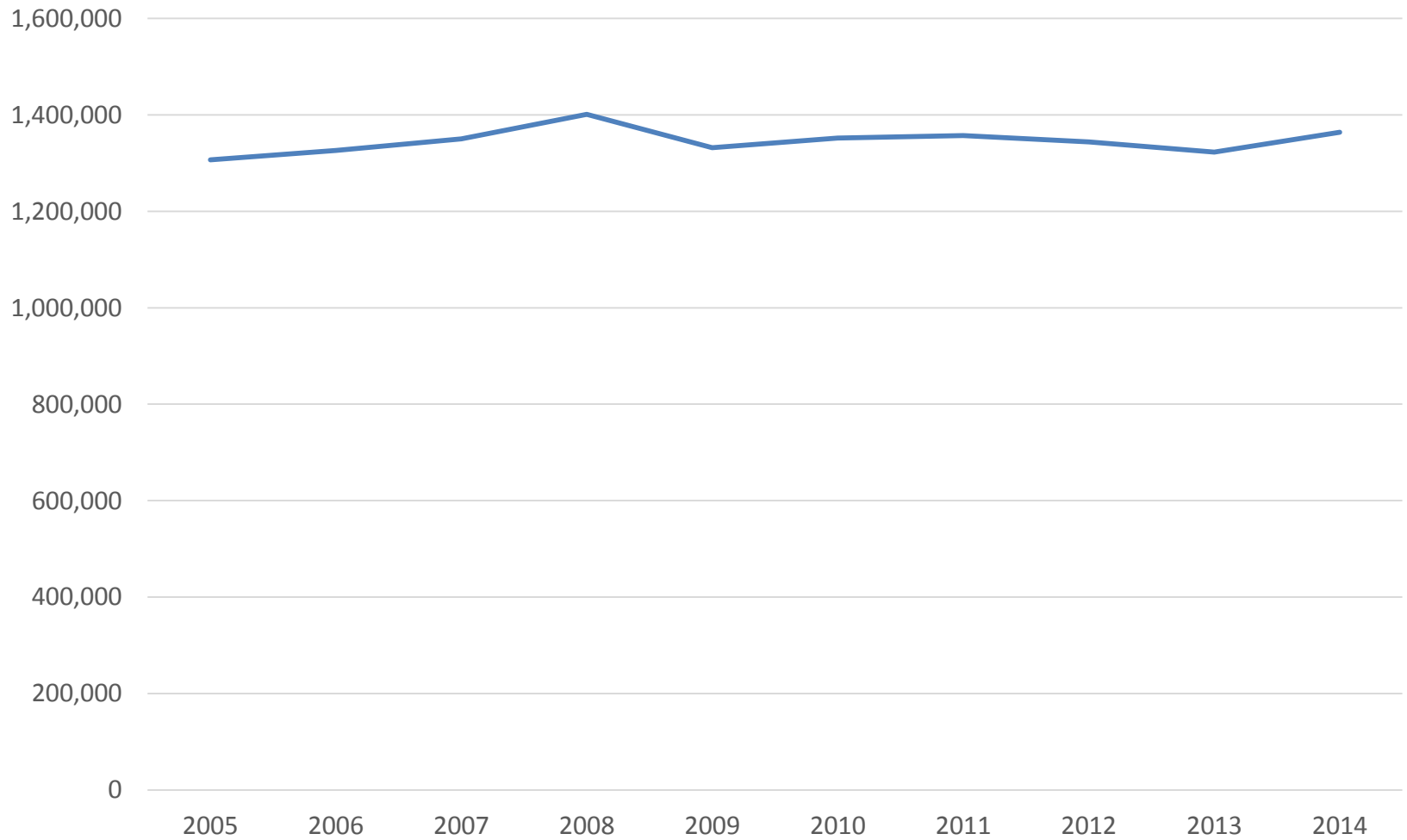


■ Occupancy Rate — 2014 Eastern Shore Room Nights Sold

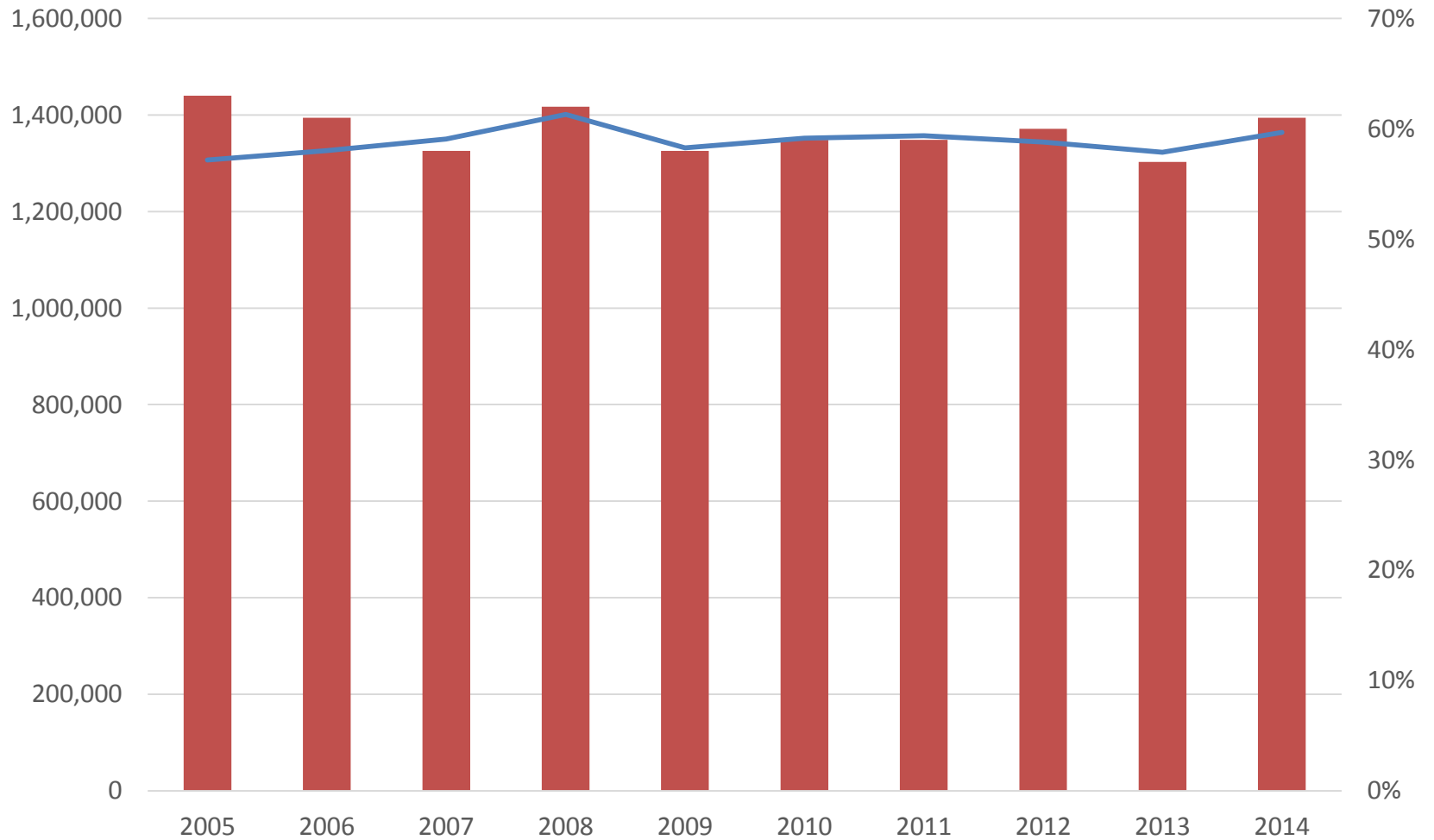


Halifax Metro

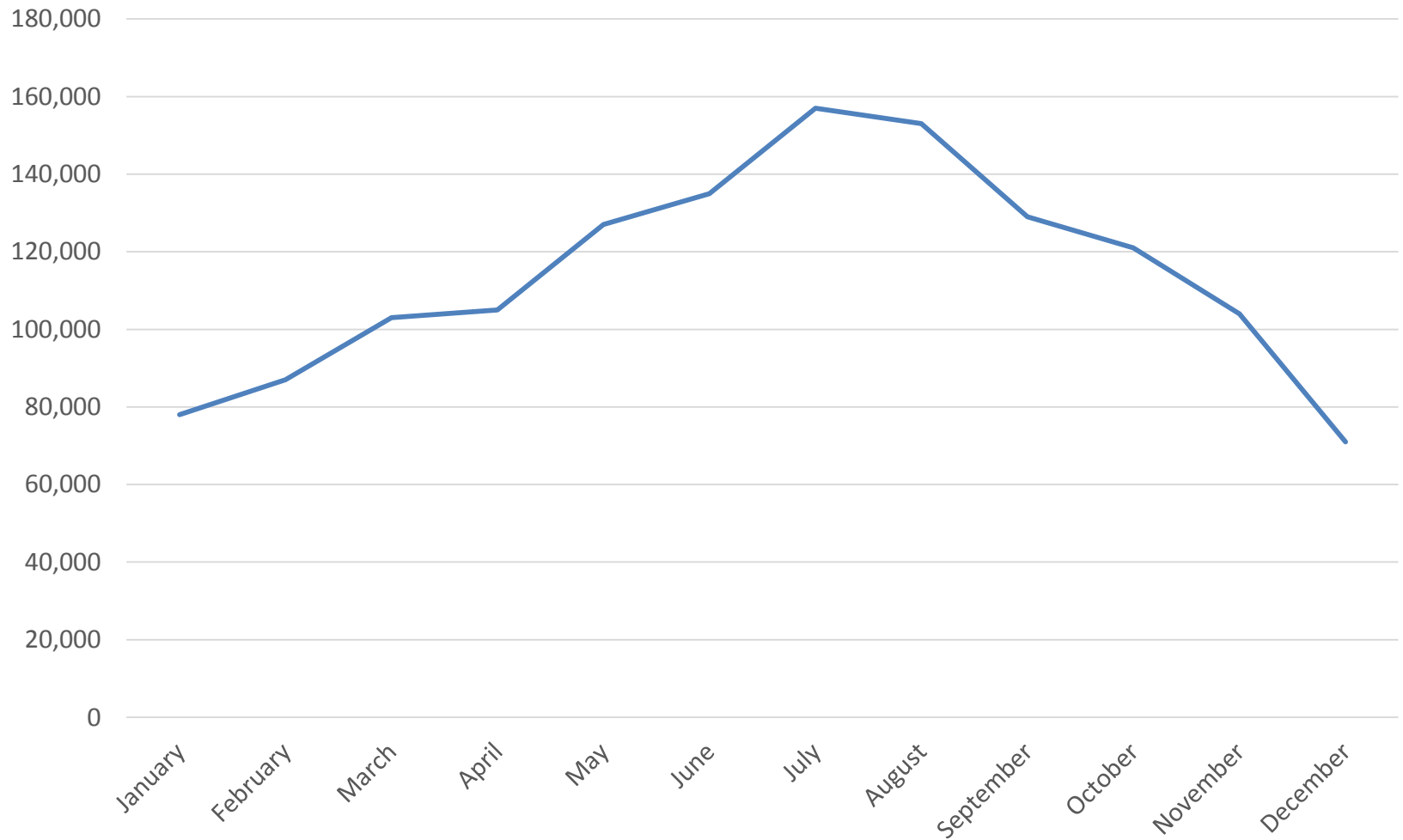
— Halifax Metro Room Nights Sold



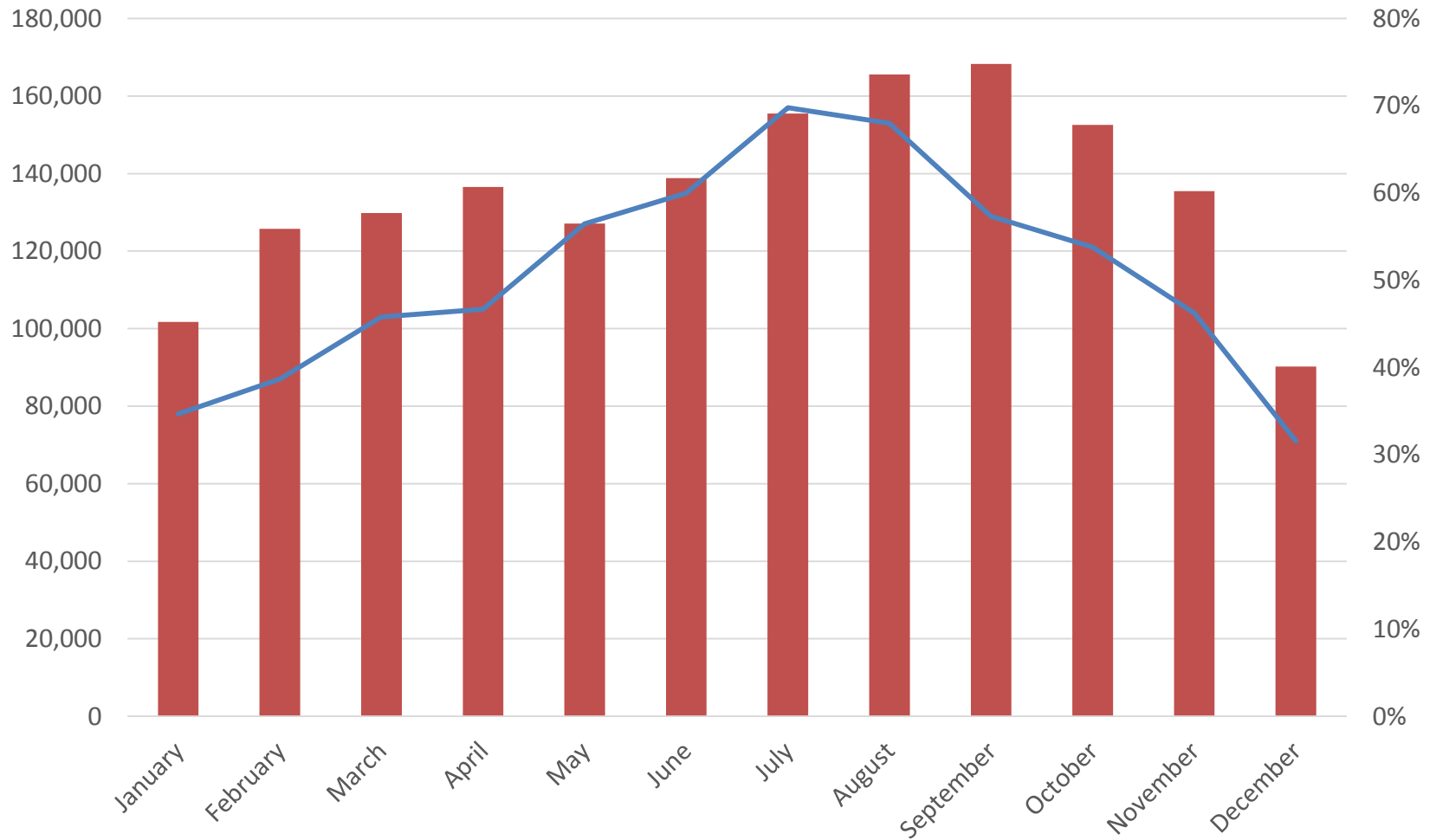
■ Occupancy Rate — Halifax Metro Room Nights Sold



2014 Halifax Metro Room Nights Sold

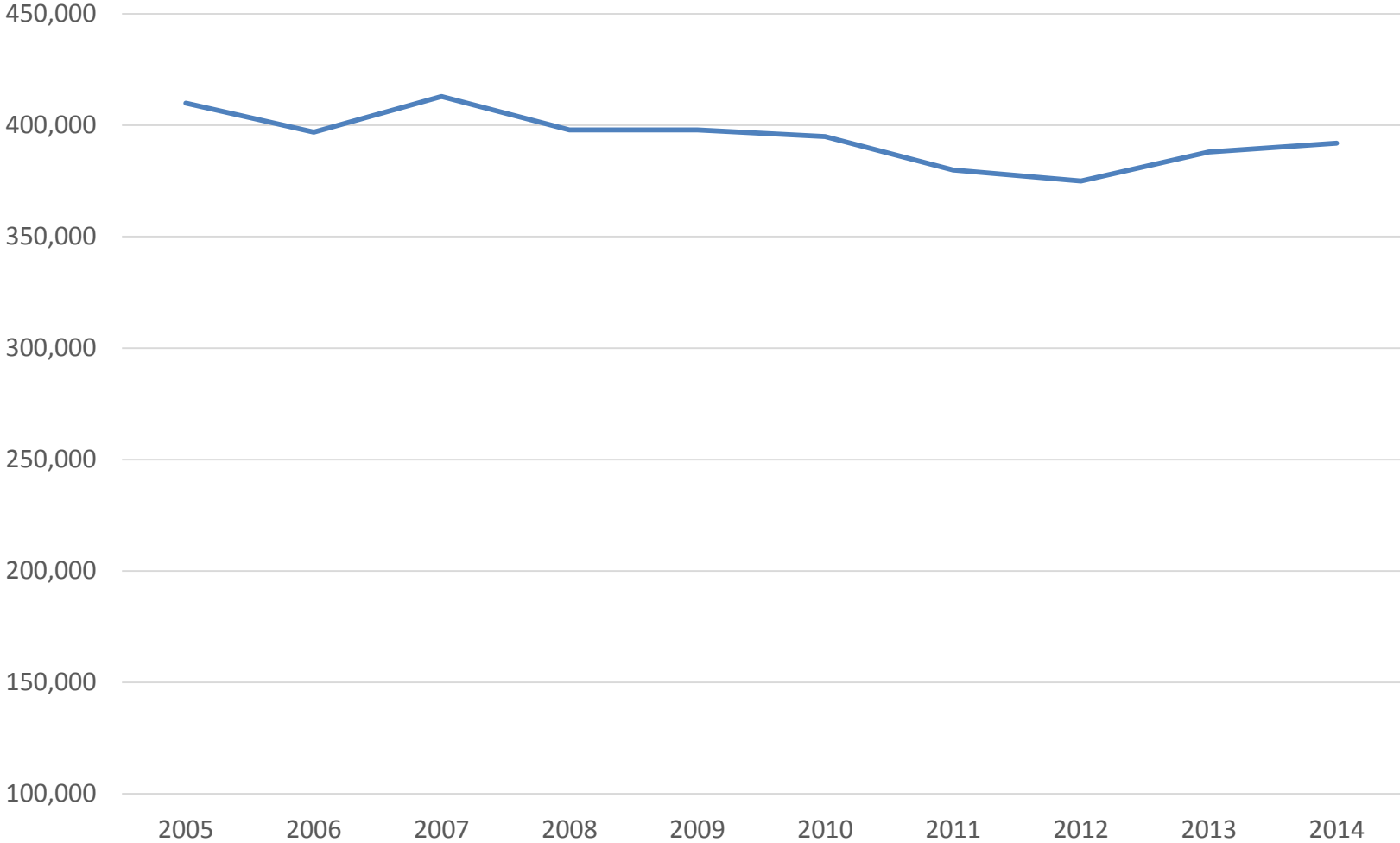


■ Occupancy Rate — 2014 Halifax Metro Room Nights Sold

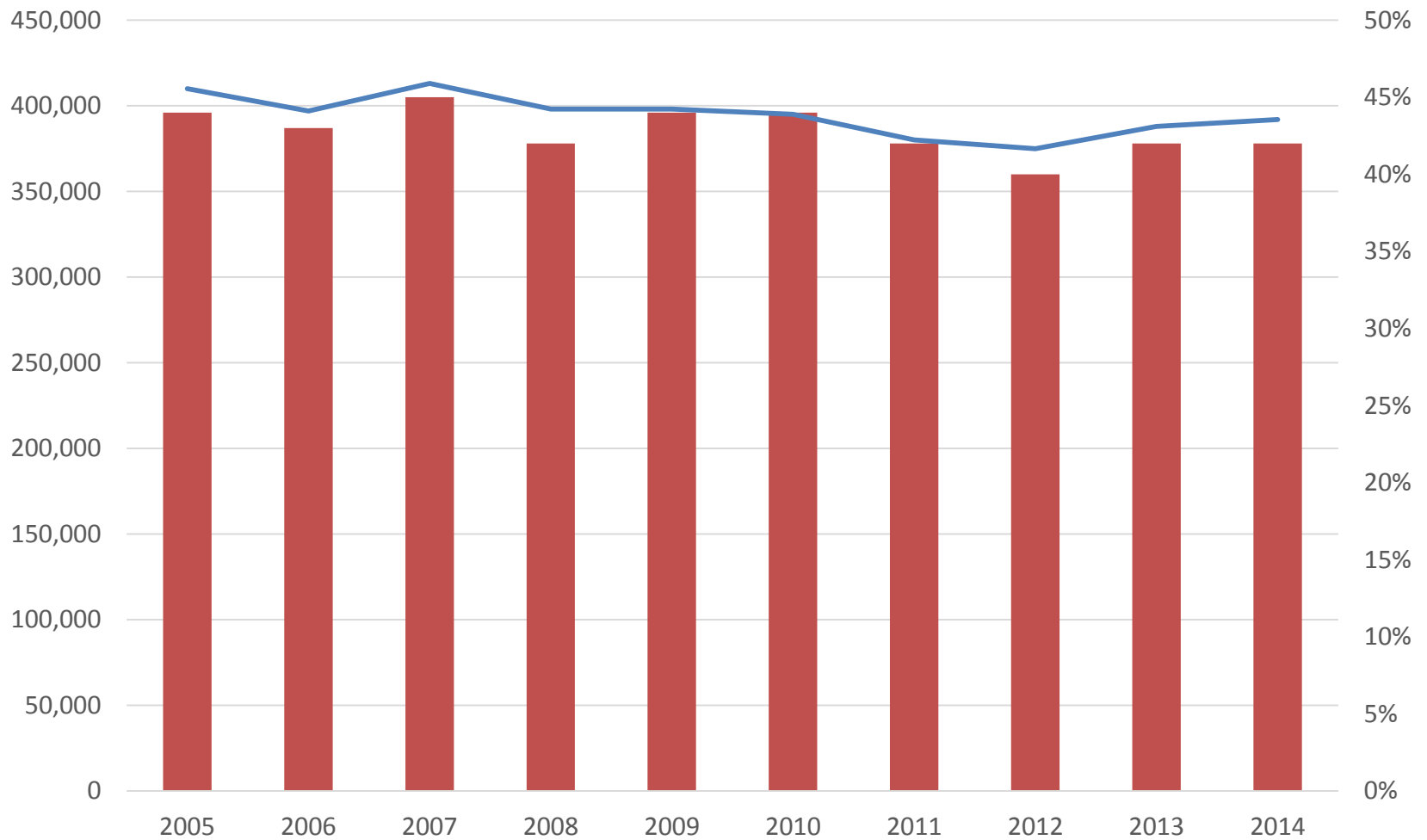


Cape Breton

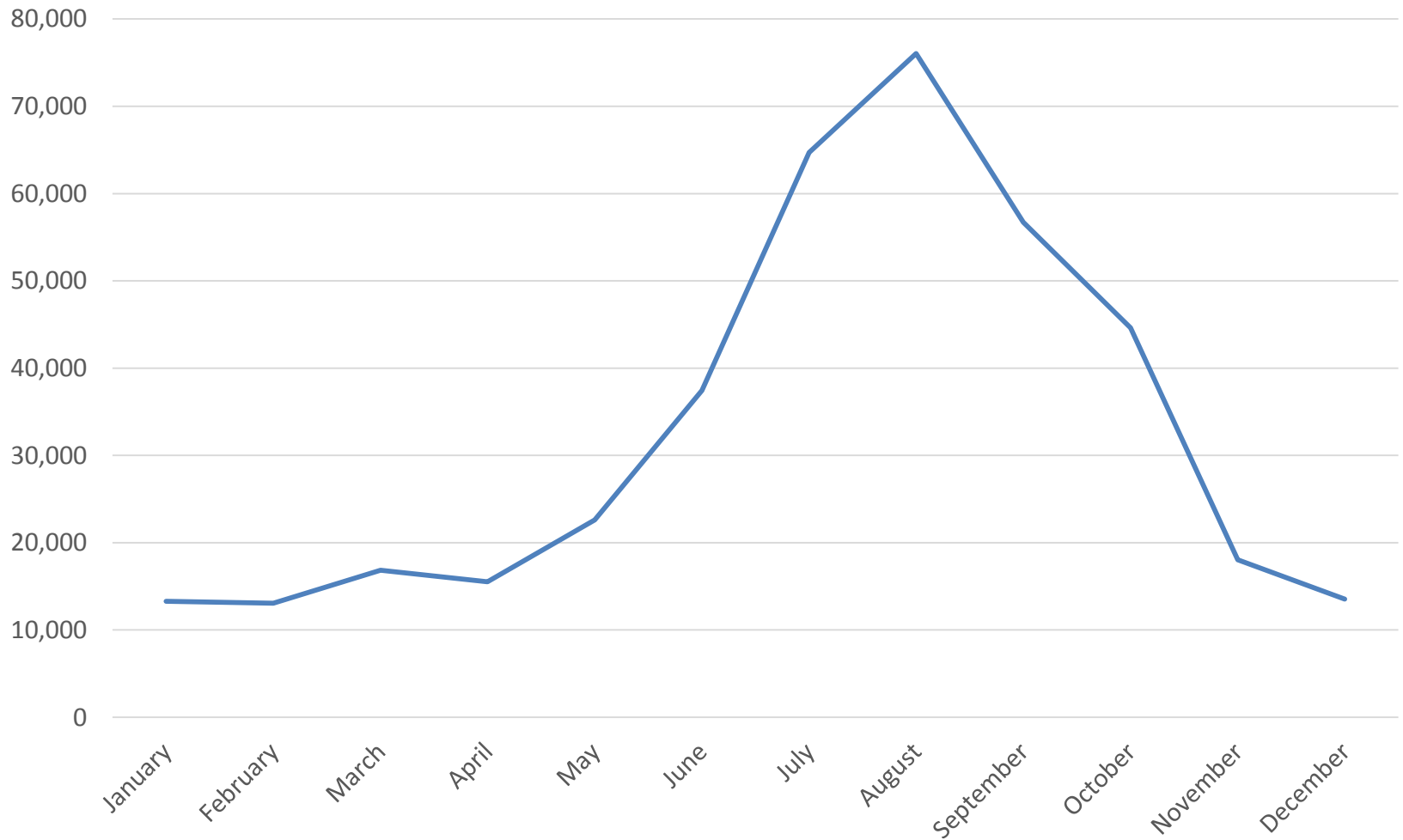
Cape Breton Room Nights Sold



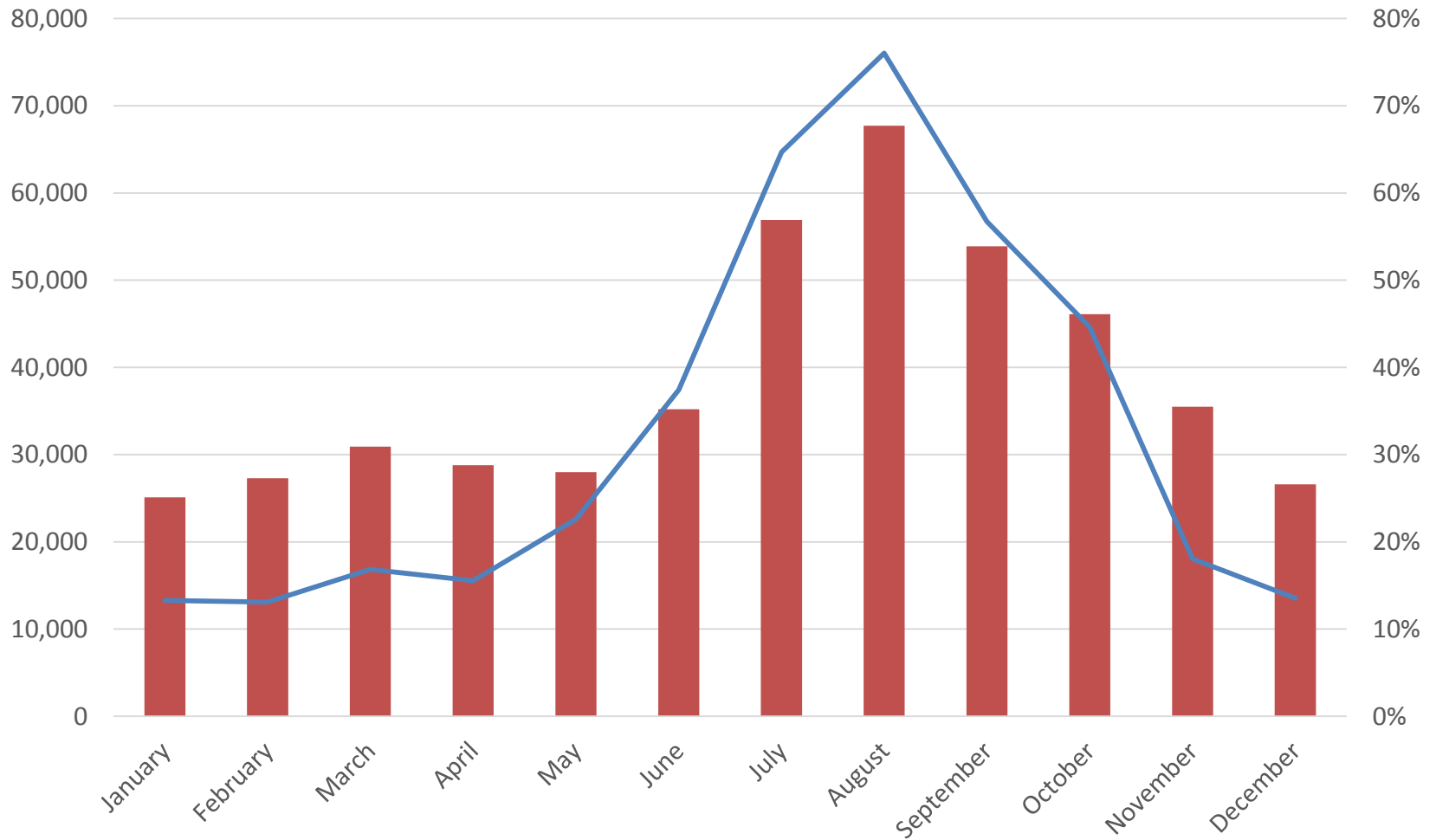
■ Occupancy Rate — Cape Breton Room Nights Sold



2014 Cape Breton Room Nights Sold

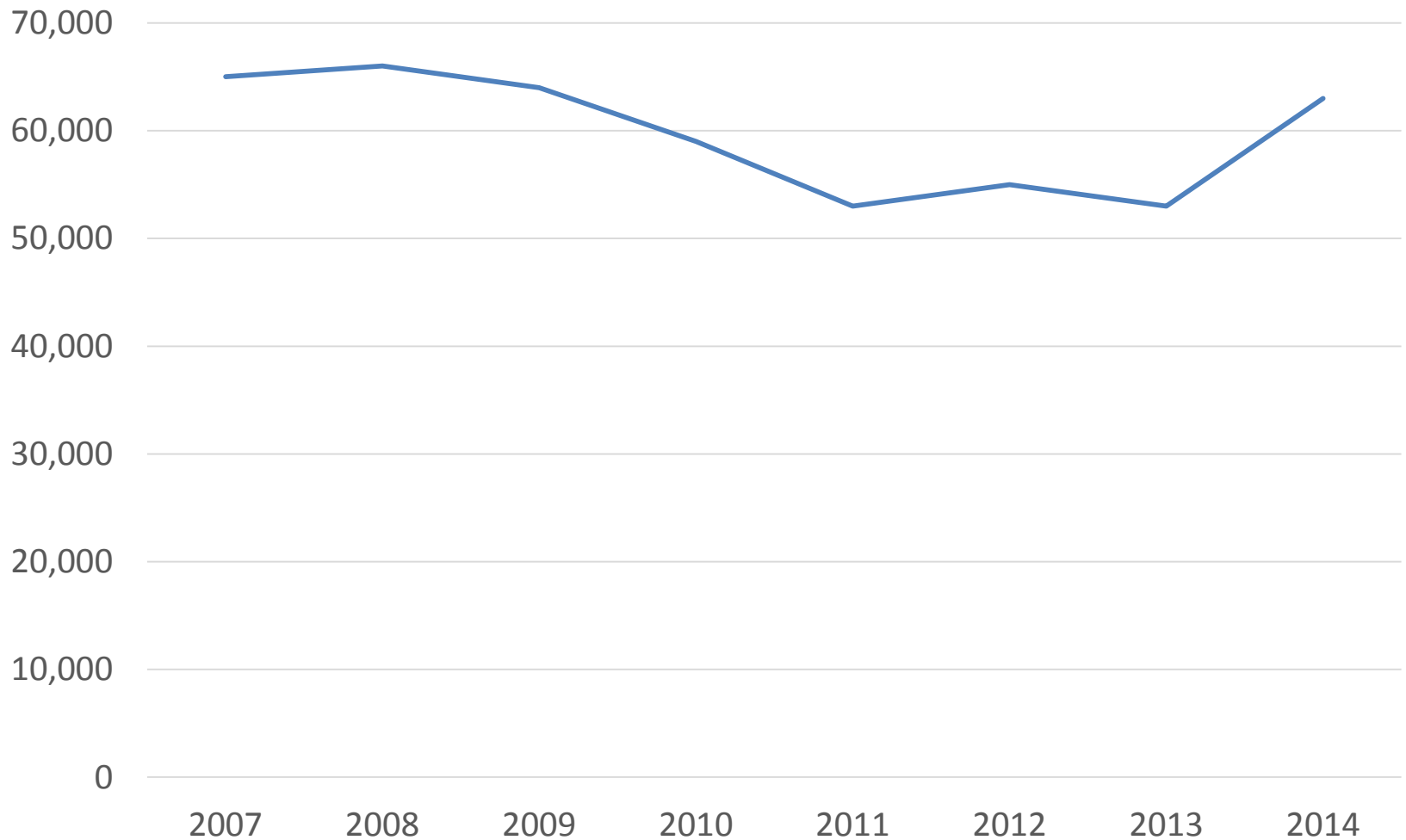


■ Occupancy Rate — 2014 Cape Breton Room Nights Sold

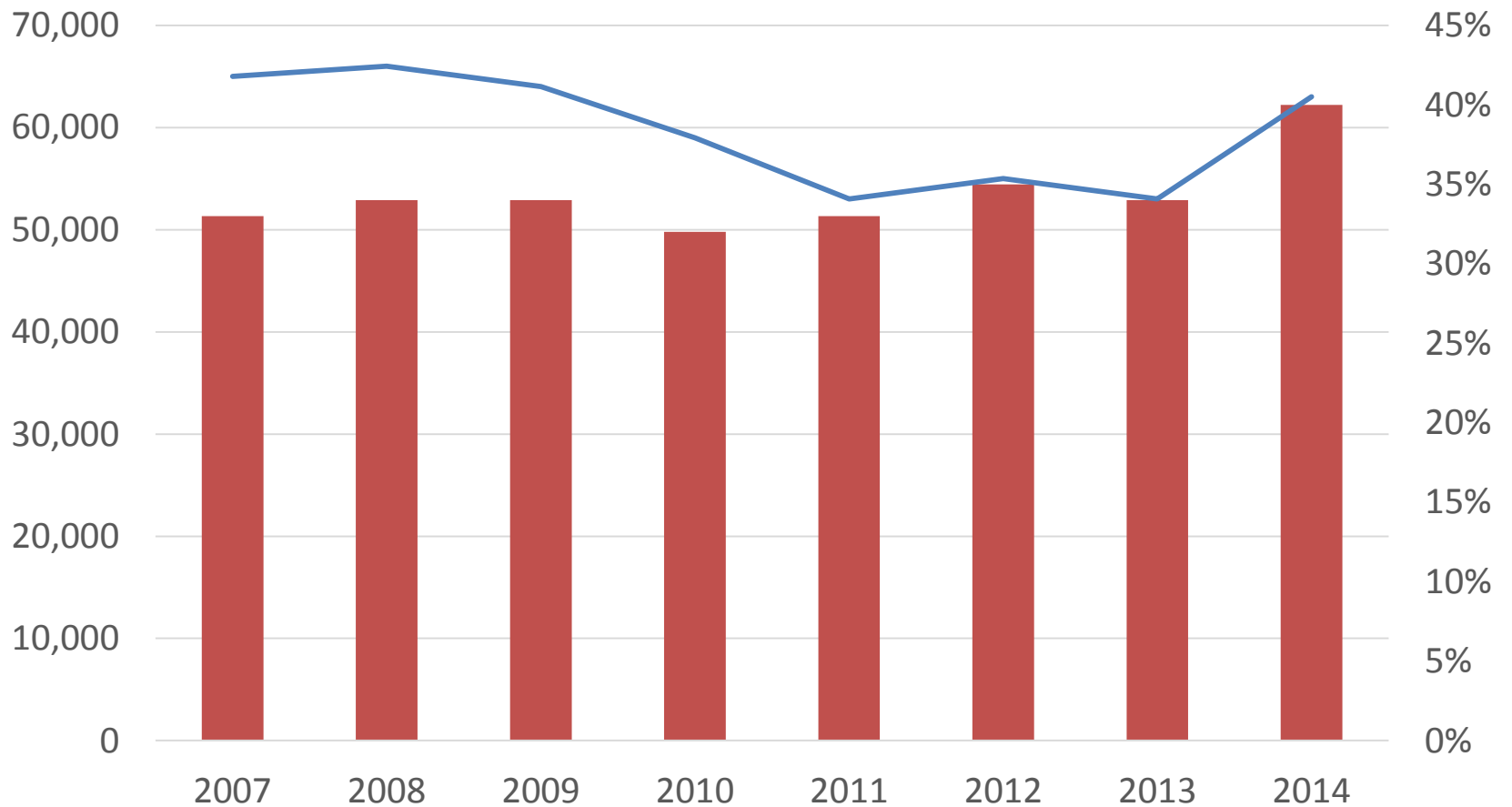


Yarmouth & Acadian Shores

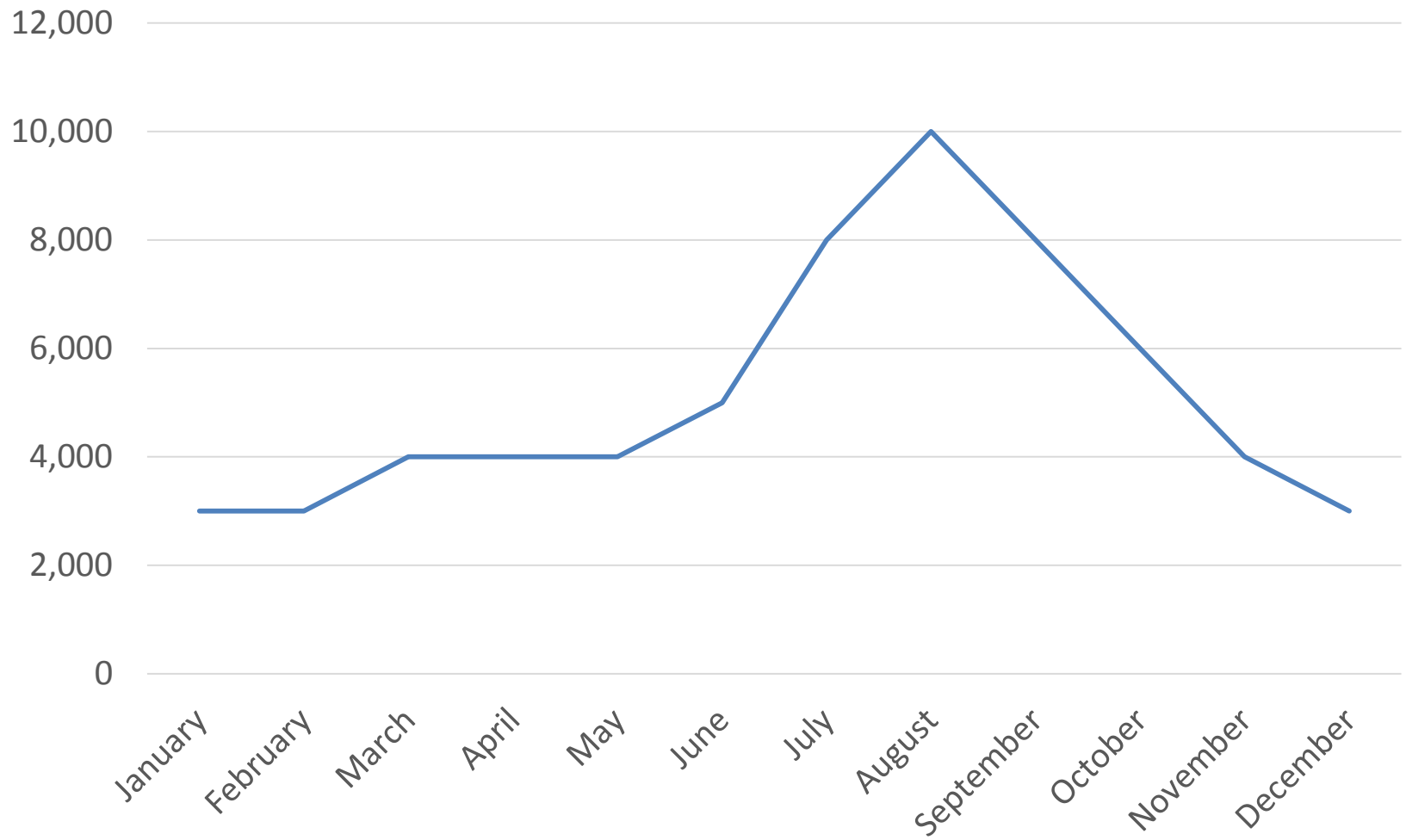
Yarmouth & Acadian Shores Room Nights Sold



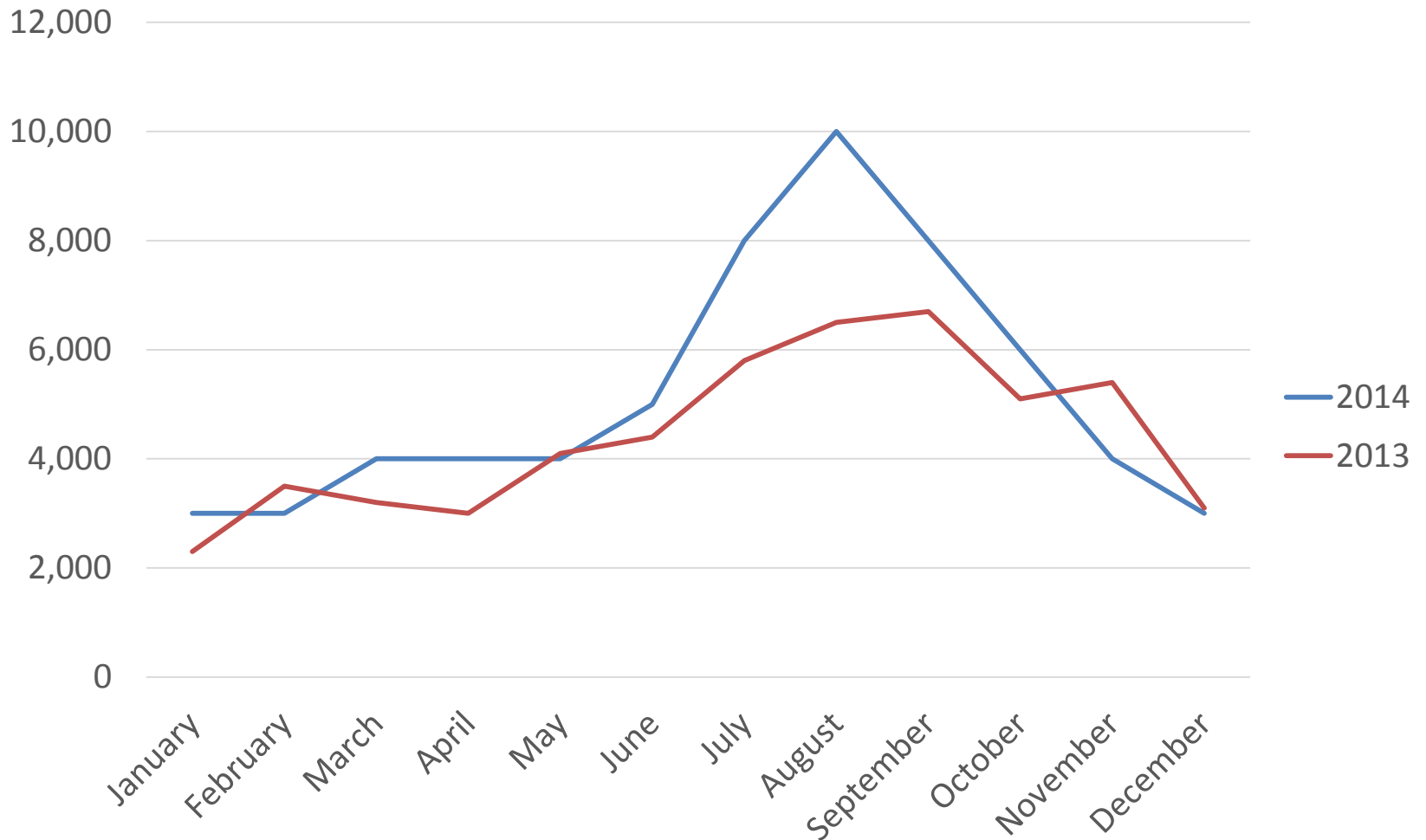
■ Occupancy Rate — Yarmouth & Acadian Shores Room Nights



2014 Yarmouth & Acadian Shores Room Nights Sold

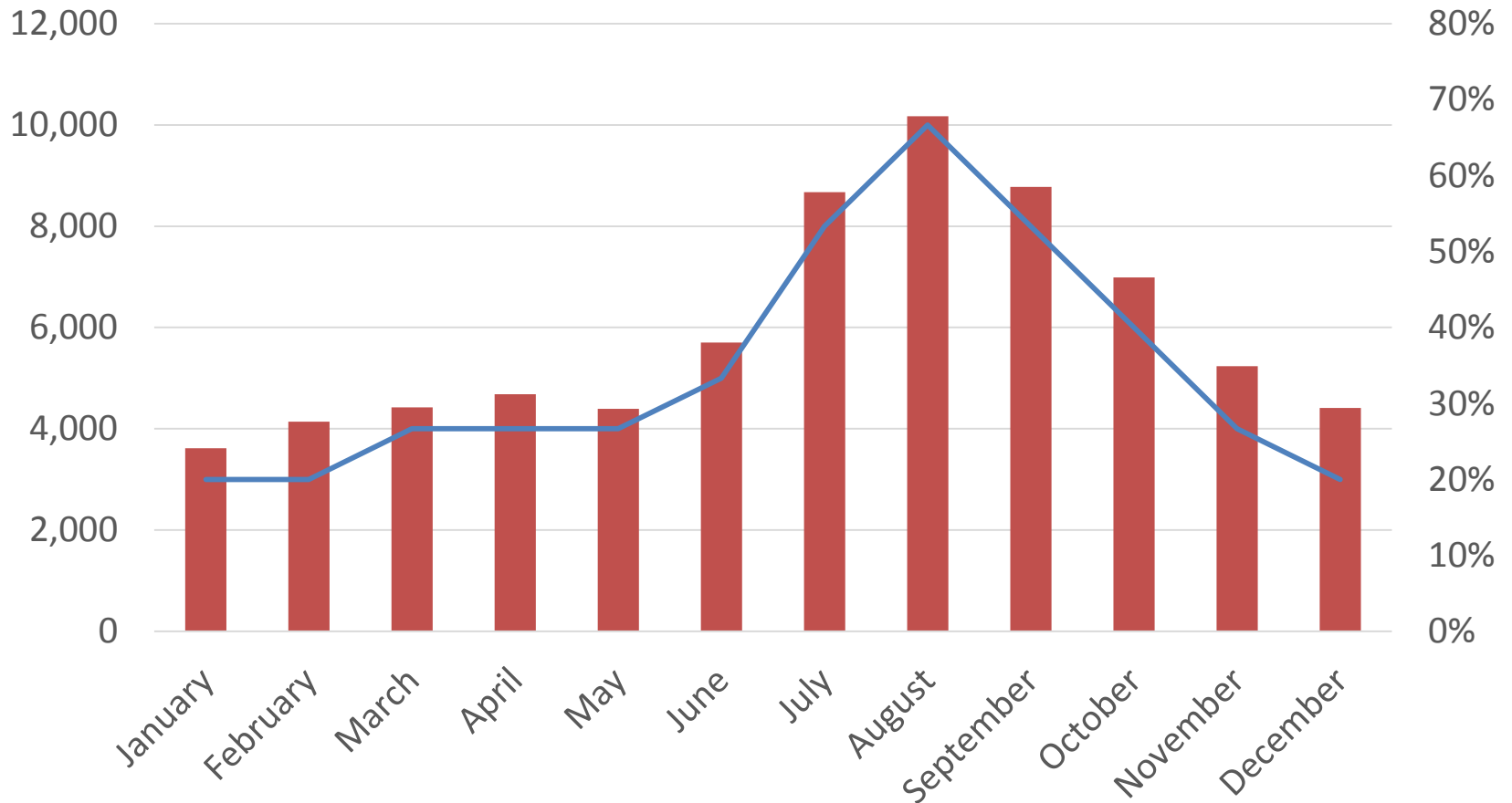


Yarmouth & Acadian Shores Room Nights Sold



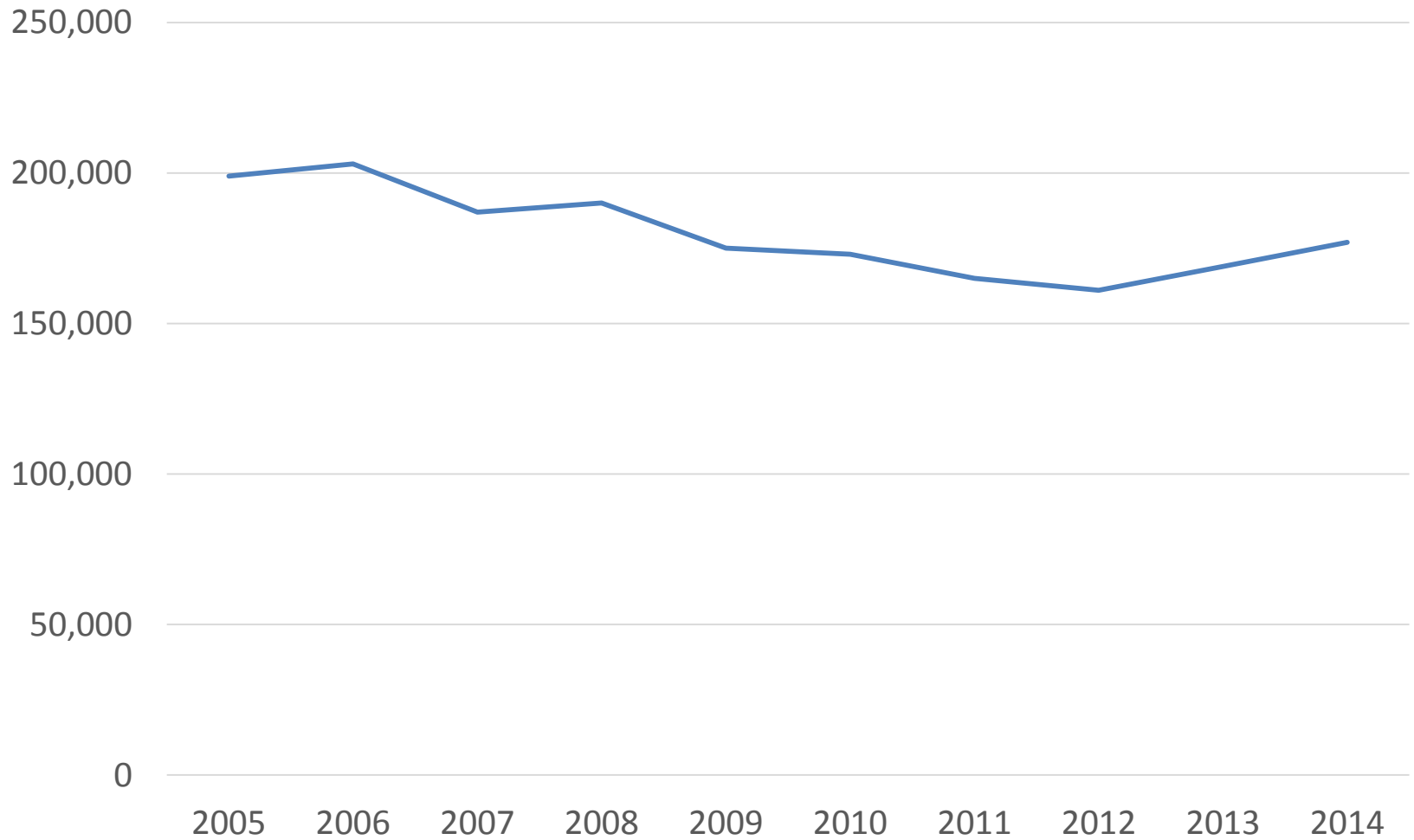
■ Occupancy Rate

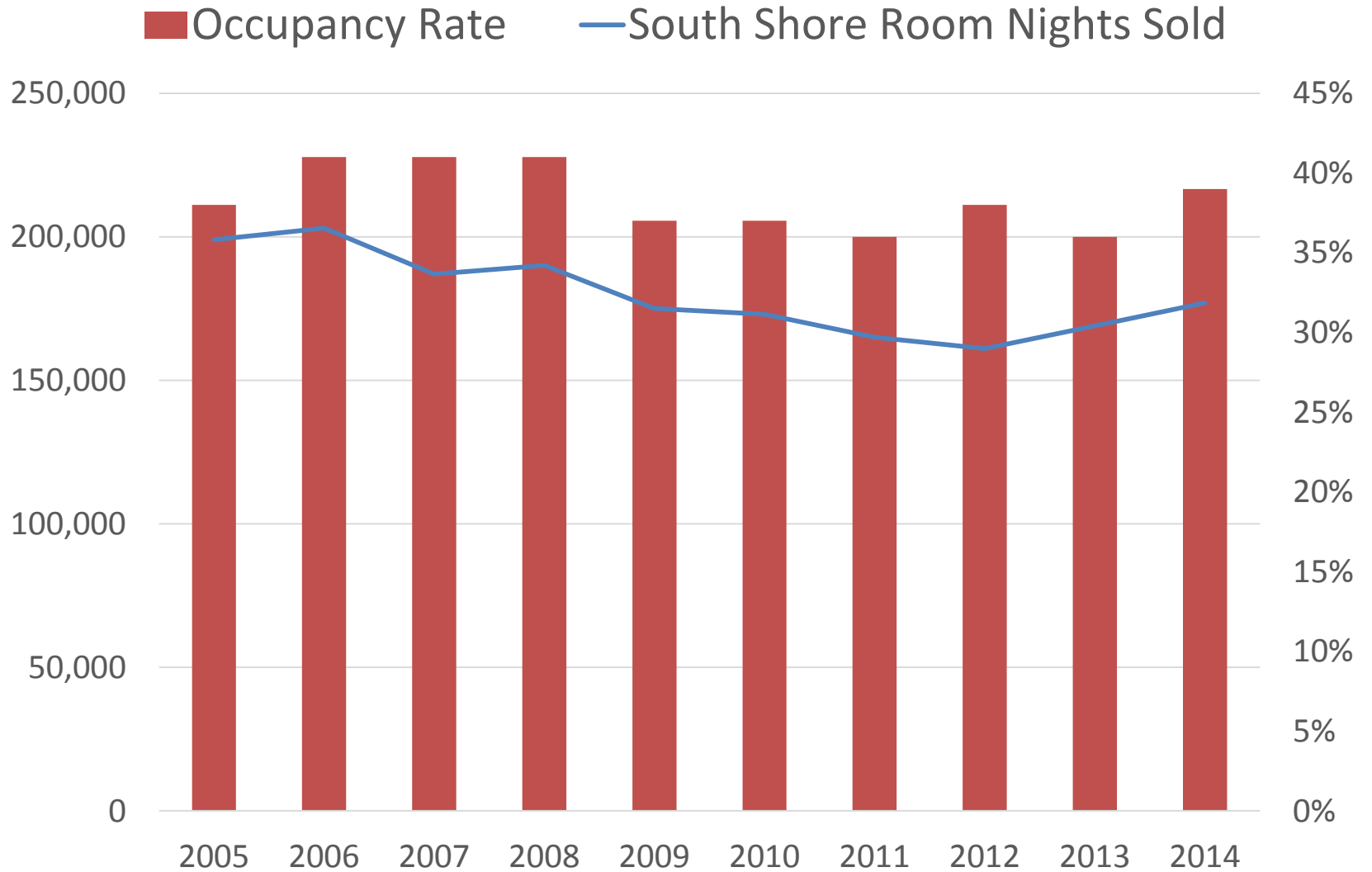
— 2014 Yarmouth & Acadian Shores Room Nights Sold



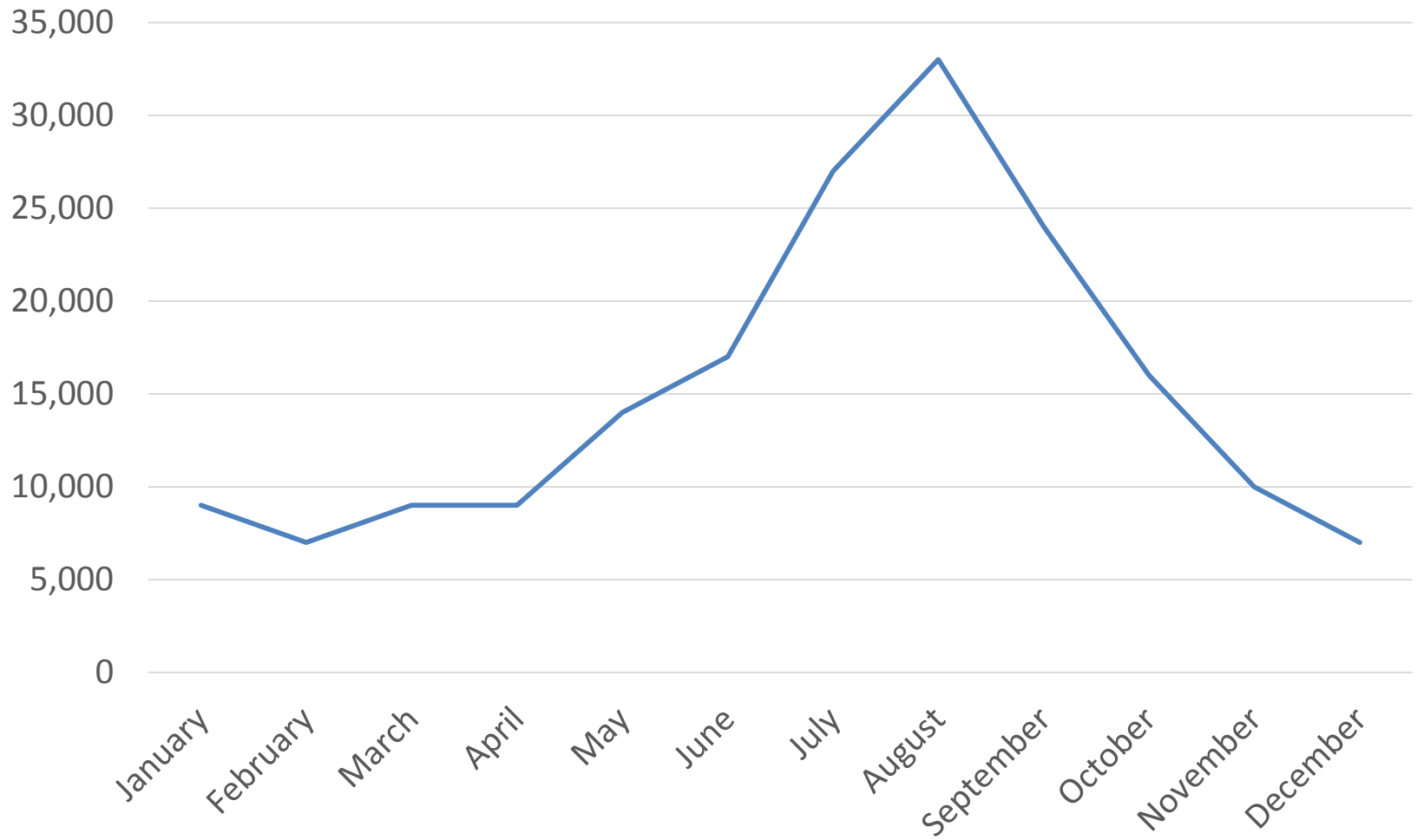
South Shore

— South Shore Room Nights Sold

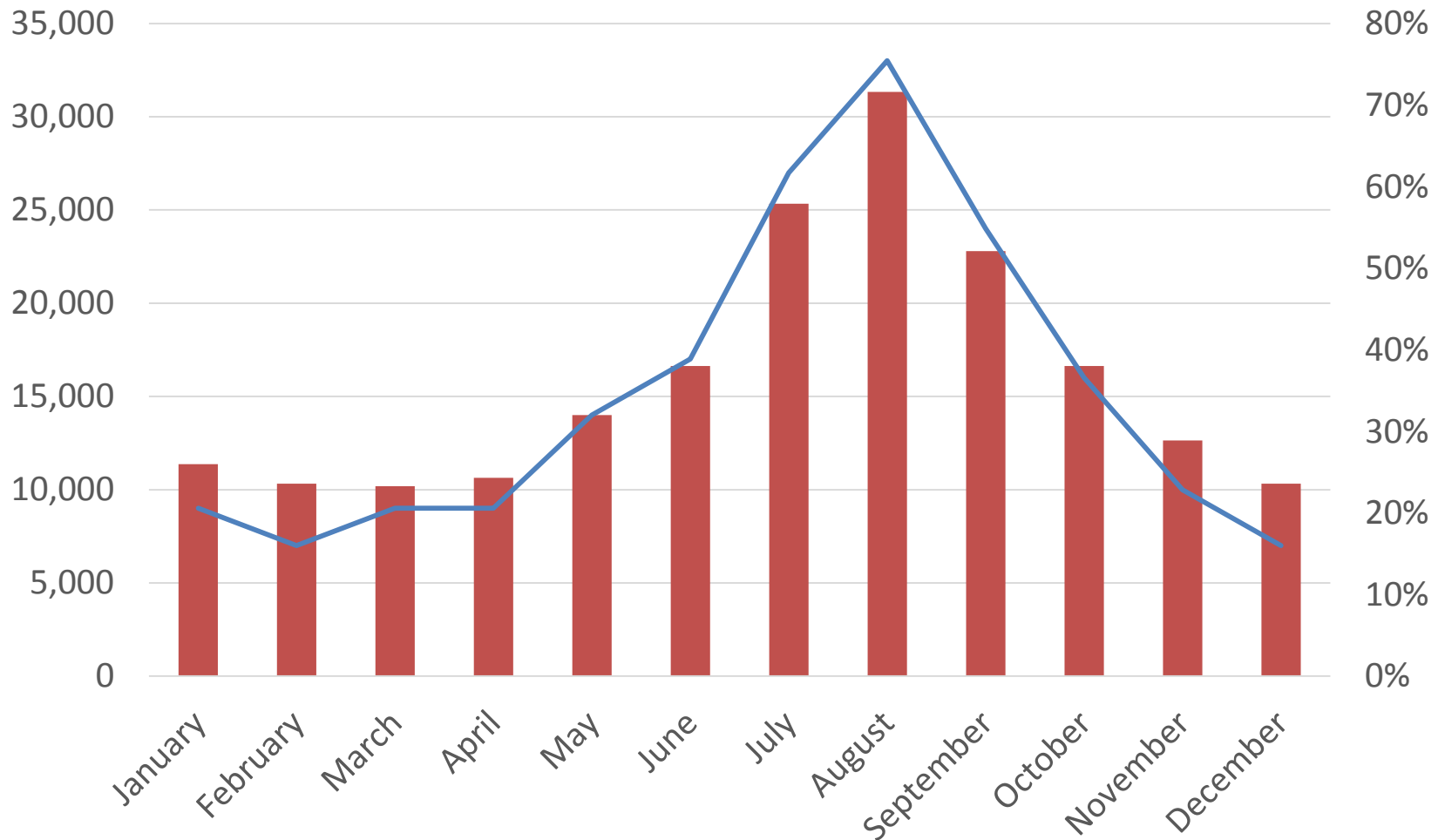




— 2014 South Shore Room Nights Sold

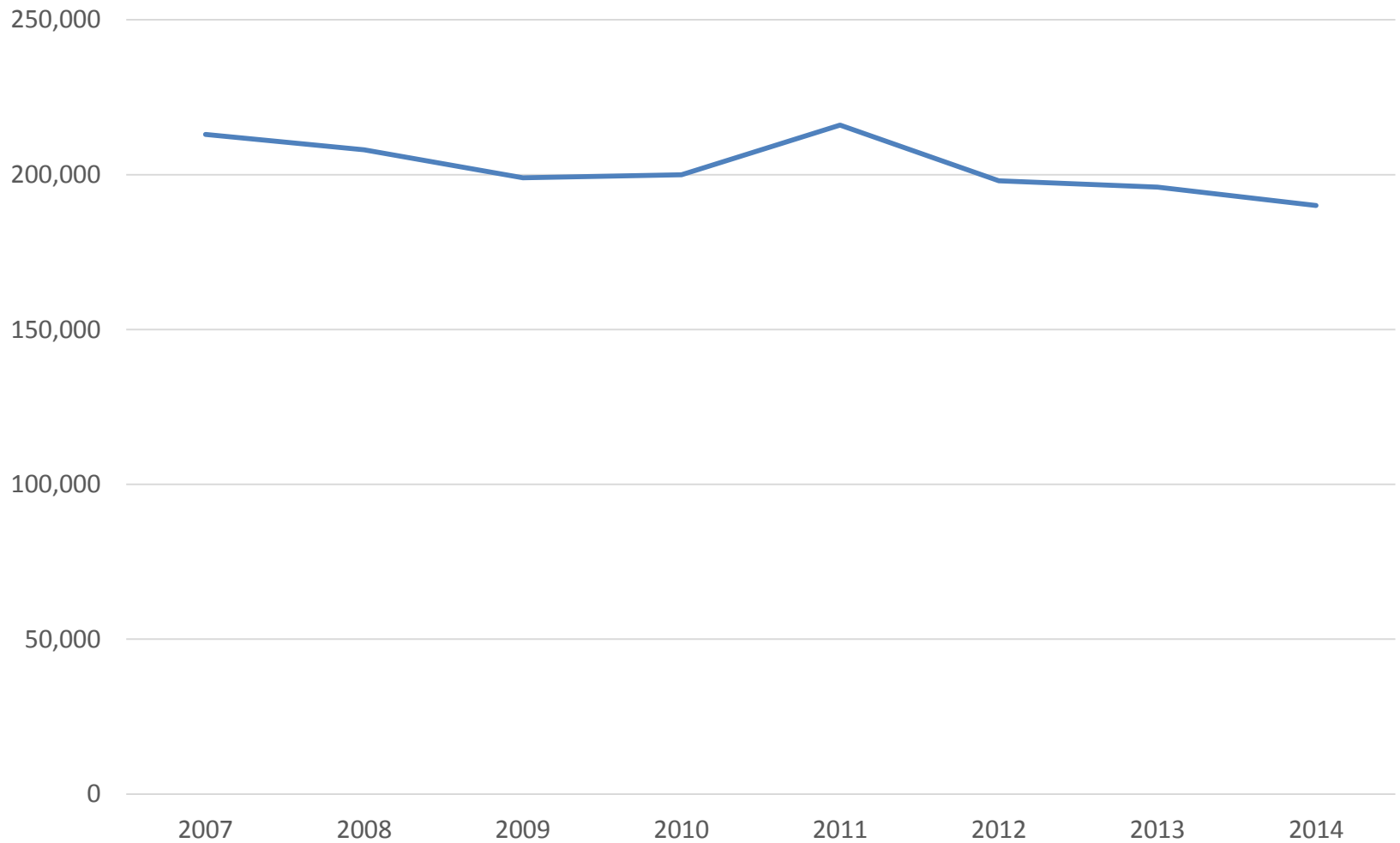


■ Occupancy Rate — 2014 South Shore Room Nights Sold



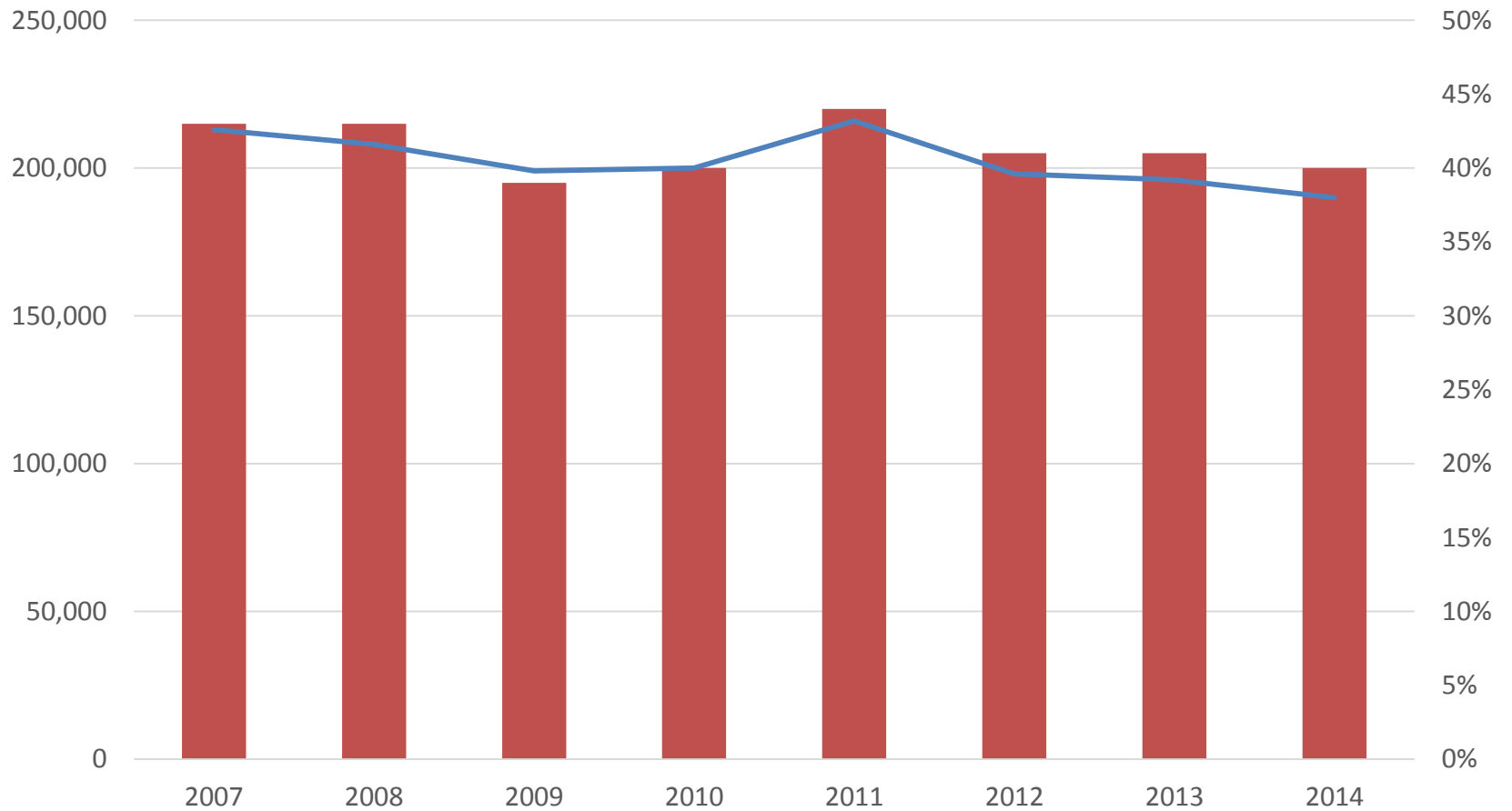
Northumberland Shore

Northumberland Shore Room Nights Sold

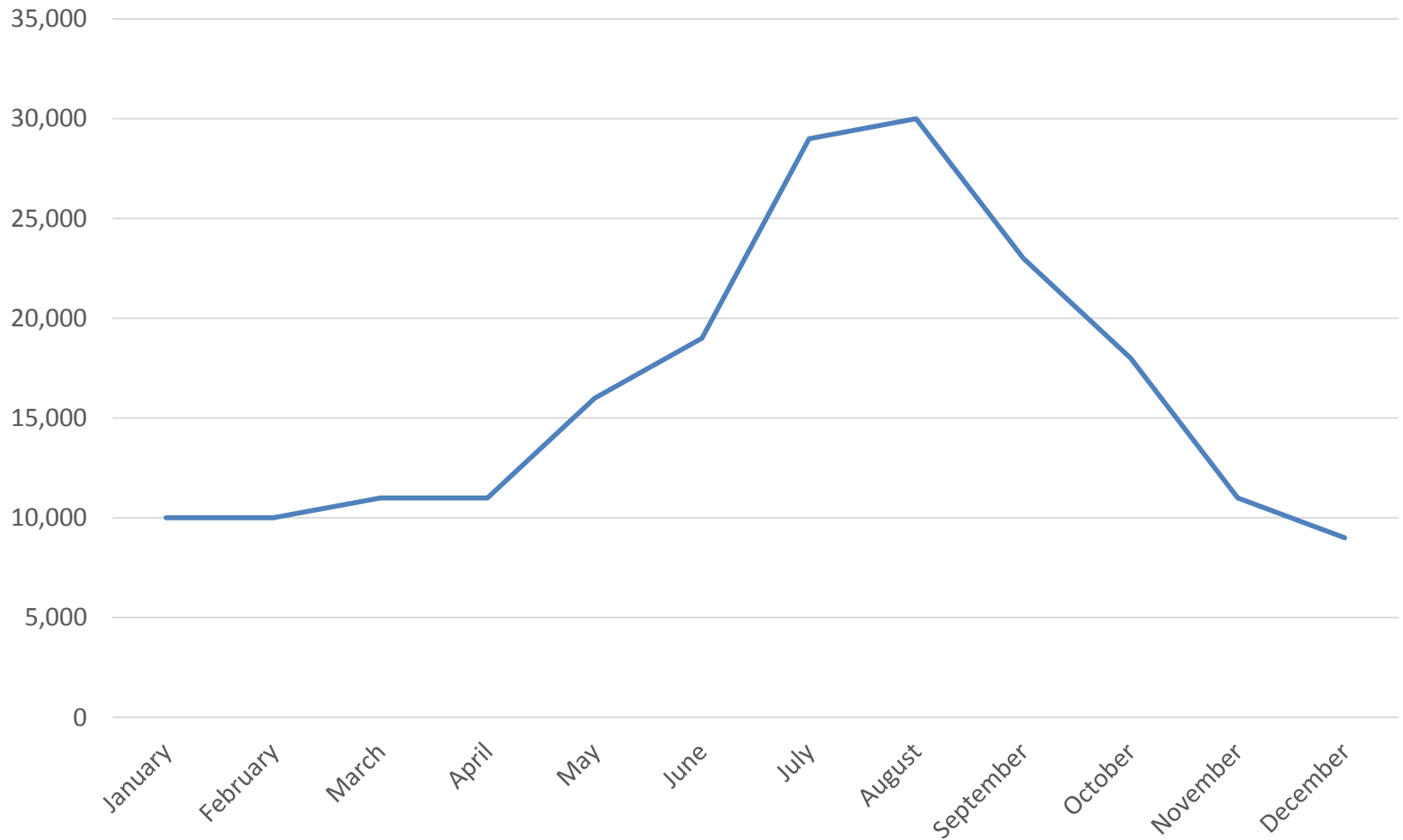


■ Occupancy Rate

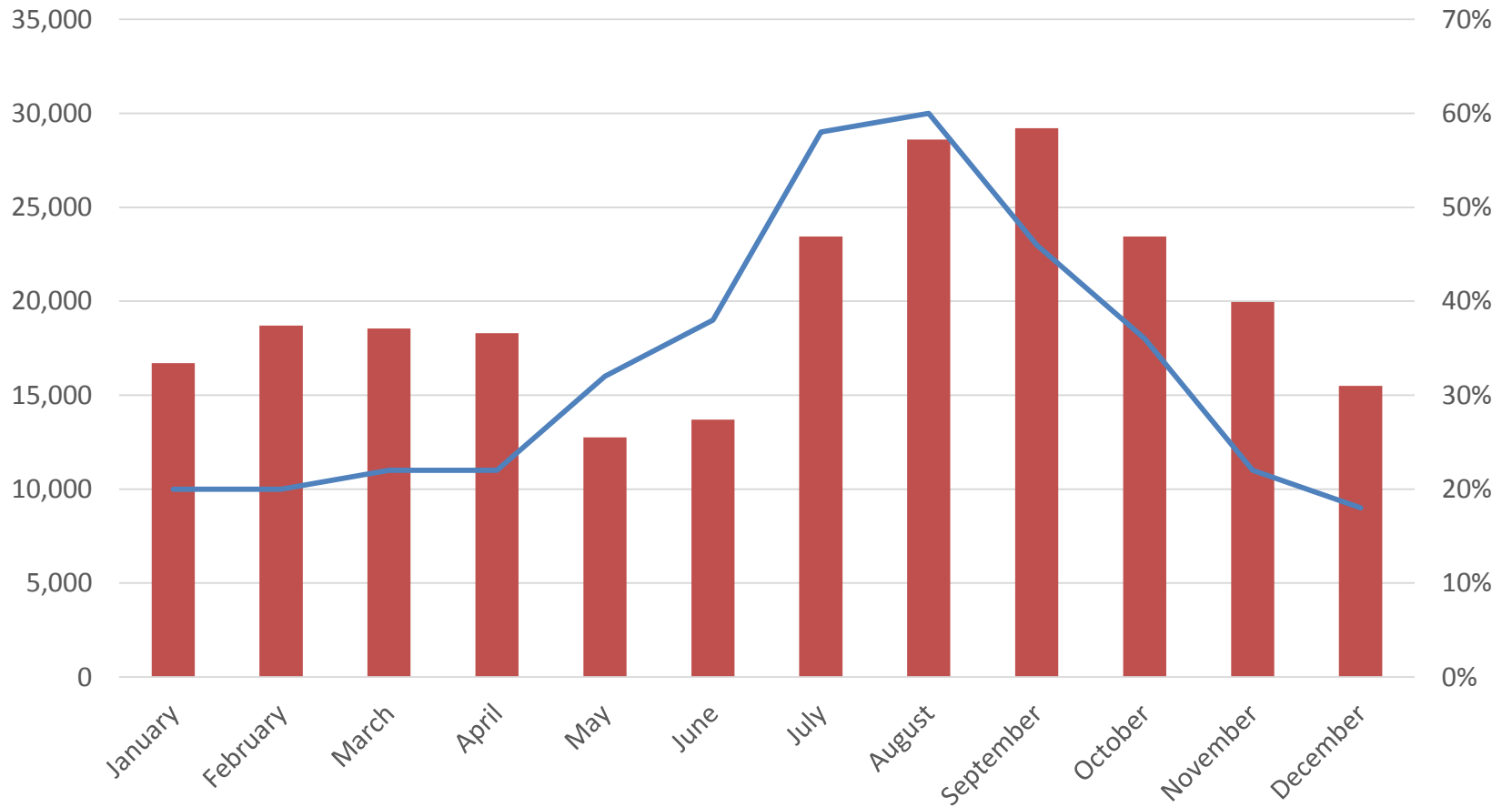
— Northumberland Shore Room Nights Sold



2014 Northumberland Shore Room Nights Sold



■ Occupancy Rate
 — 2014 Northumberland Shore Room Nights Sold



Brand Health

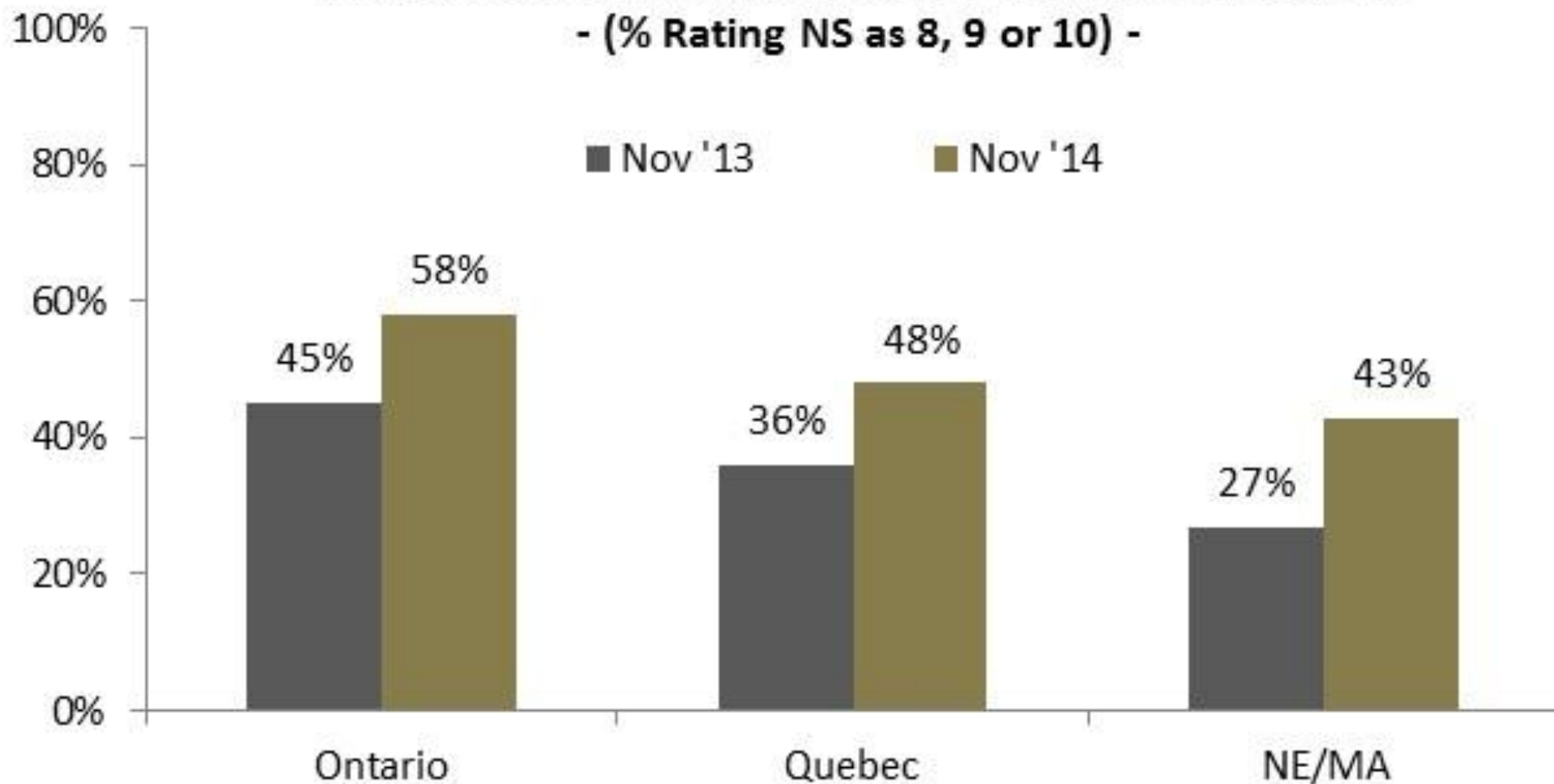
Nova Scotia Brand Health Monitor

This annual study assesses the health of the Nova Scotia tourism brand in key markets:

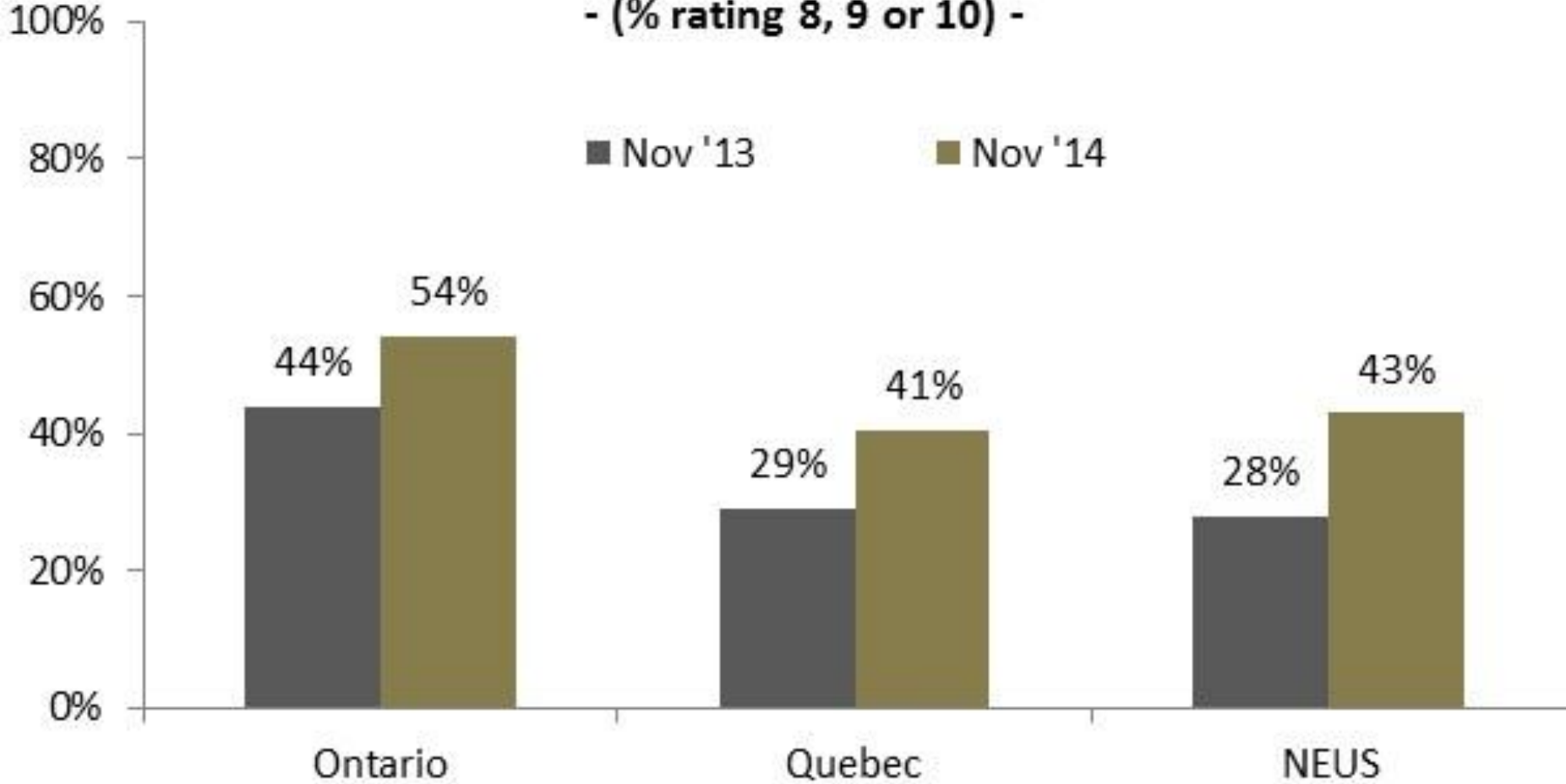
- Ontario
- Quebec
- New England/Mid-Atlantic

Conducted with leisure travellers in the three markets.

Attractiveness of Nova Scotia as a Vacation Destination - (% Rating NS as 8, 9 or 10) -



Interest in Visiting Nova Scotia - (% rating 8, 9 or 10) -



Brand Connection

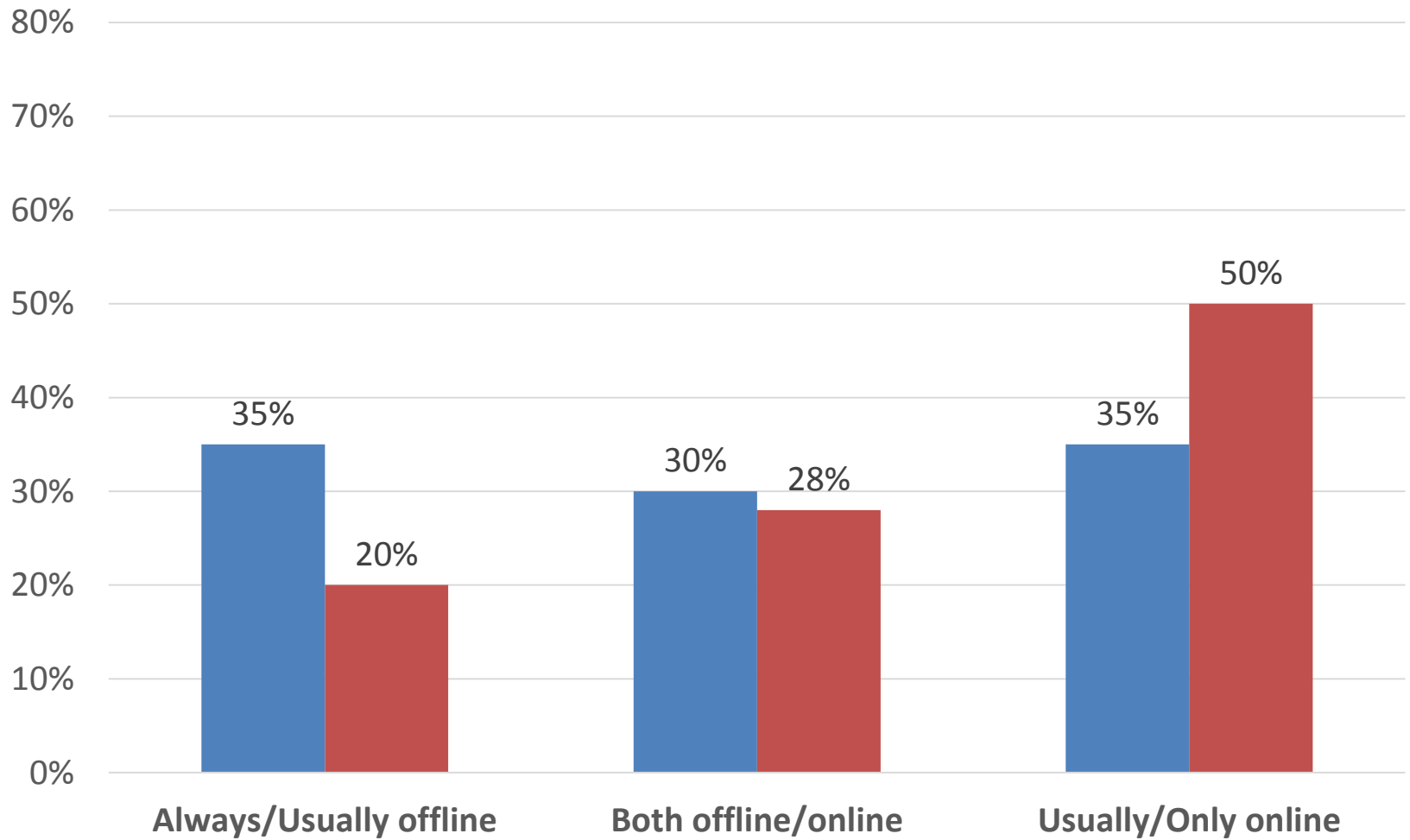
Brand Connection Statements	Ontario	Quebec	NE/MA
I can see myself on vacation in Nova Scotia	62%	44%	48%
Nova Scotia is a place that suits my vacation tastes	51%	36%	40%

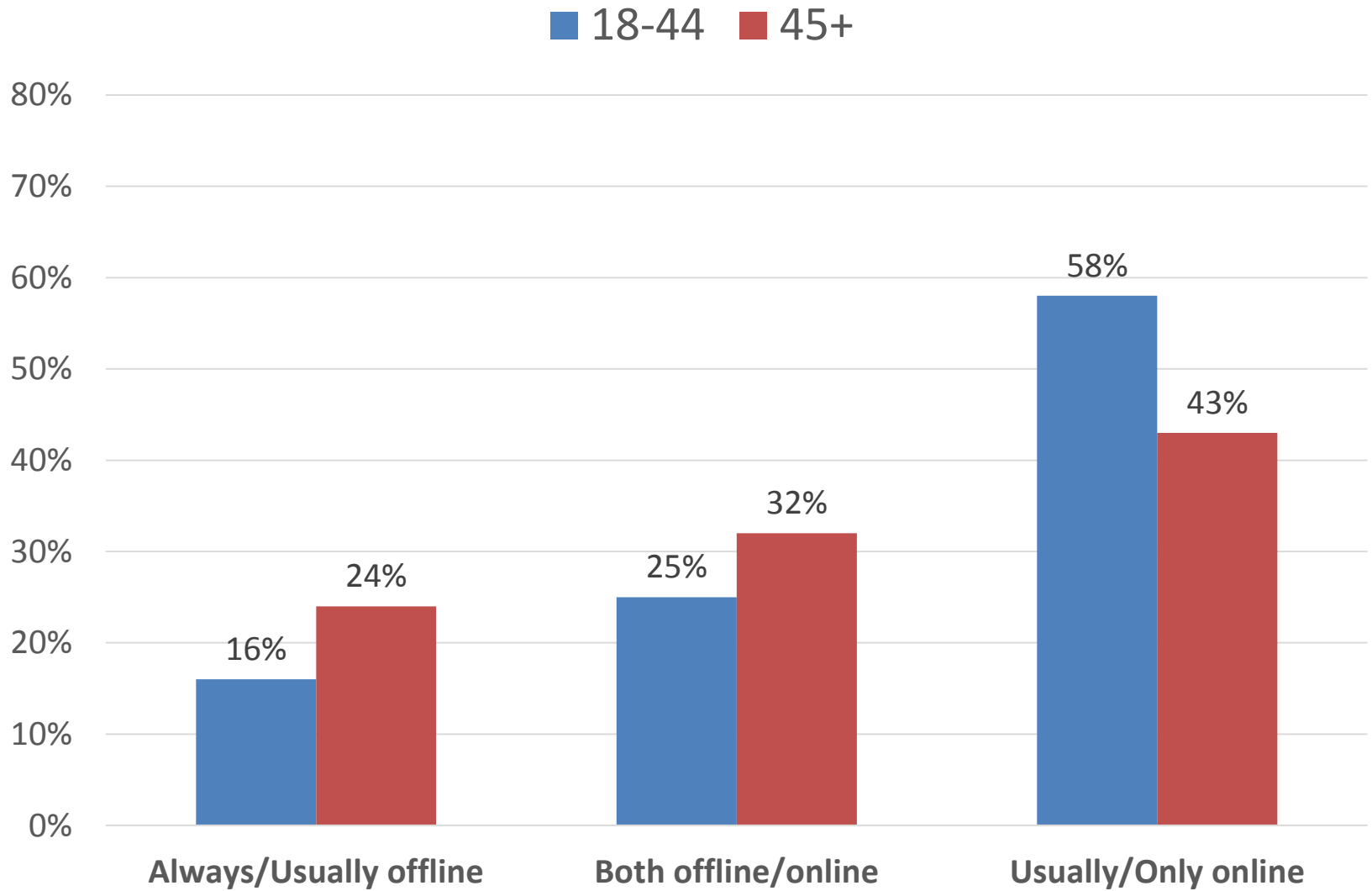
PhoCusWright Travel Survey of Canadians

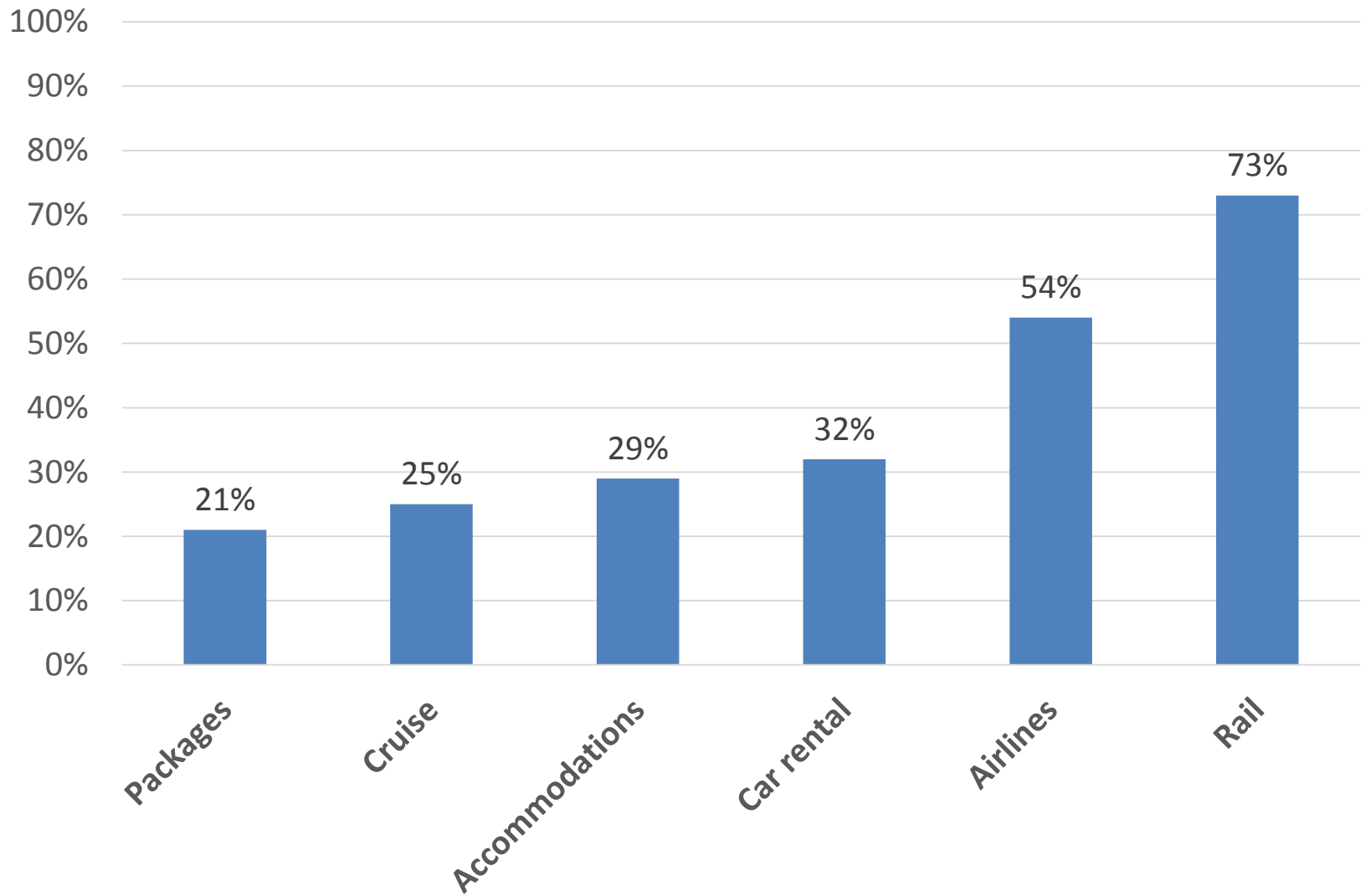
Canadian Travel Study of Canadians

- Online surveys with 2,028 Canadian travellers
- In-depth interviews with suppliers, tour operators, OTAs and other online travel and technology companies
- Review of third party data, including Statistics Canada, Canadian Tourism Commission, etc.

■ 2010 ■ 2014







Canadian Travel Study of Canadians

Mobile, mobile, mobile!

- Currently, there is limited use of mobile for online booking, however this is expected to change.

Implications?

Simply having a website is no longer sufficient for web-savvy travellers

- Websites should be mobile optimized.
- Websites need to allow for easy and secure online bookings.

Raise the Bar 2015: Culinary

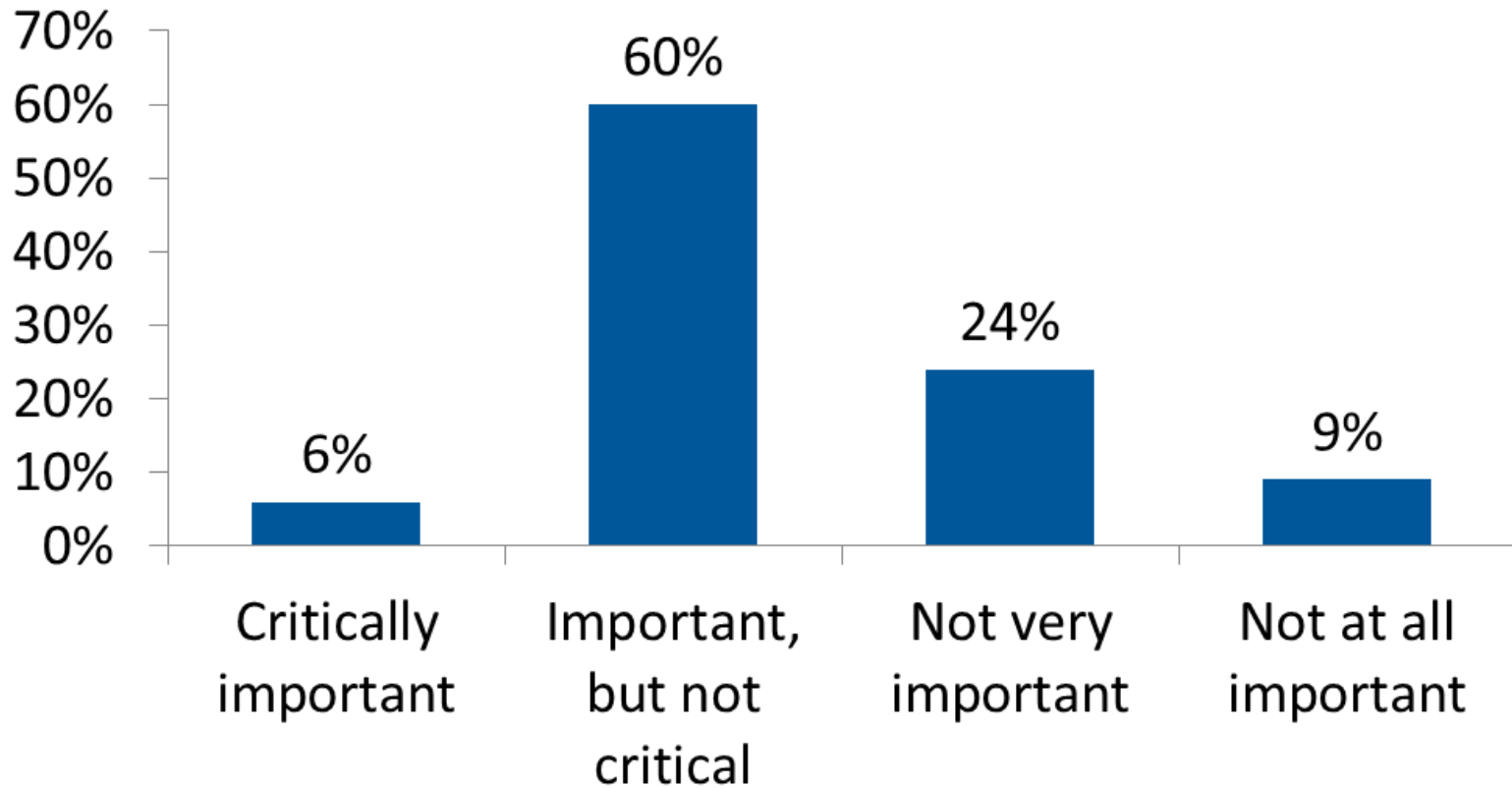
Raising the Bar 2015: Culinary

- In 2015, the various work teams at NSTA are working to strengthen Nova Scotia's reputation as a place to enjoy authentic, quality food experiences and food culture.

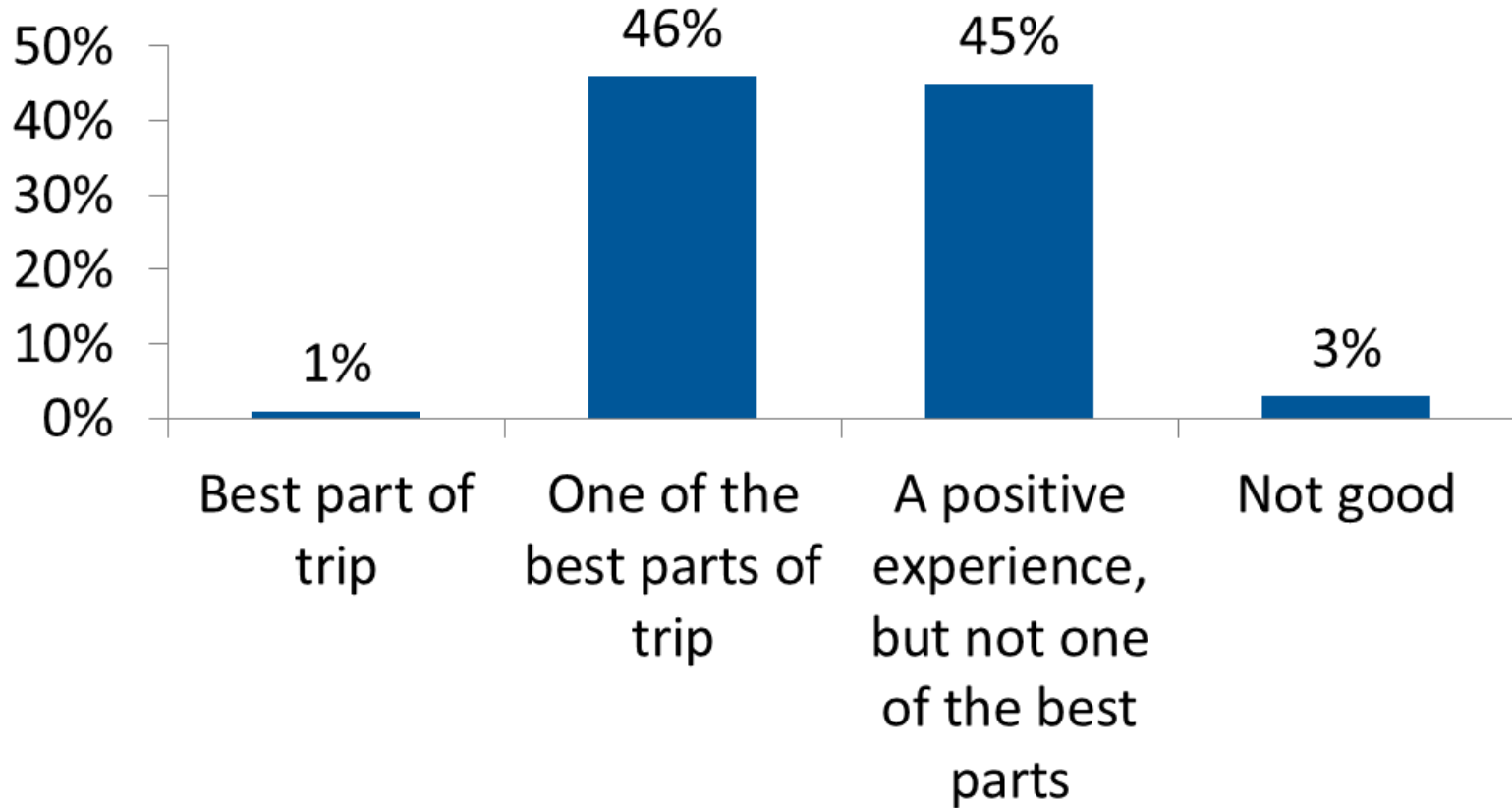
Study Objectives

- Understand what past visitors identify as Nova Scotia's culinary strengths and weaknesses.
- Understand the extent to which Nova Scotia's culinary offerings enhance the visitor experience.

Importance of Nova Scotia Food Culture on Decision to Visit



Impact of Nova Scotia Food and Drink Experiences



Lobster

Delicious

Fresh

Great Use of Local Products

High Quality

Authentic

**Traditional
Committed**

Blueberries

Beautiful Food

Chefs/ Artisans

**Uniquely Nova
Scotian**

**Farmers
Markets**

**Abundance of
Choice**

**Created with
Passion**

Creative

**Local Micro/Craft
Breweries**

Local Wineries

Surprising

**If each visitor to
Nova Scotian spend
just \$5 more on
food and drink
during their visit...**

**\$10 million in
additional tourism
revenues for Nova
Scotia!**

2015

Key 2015 Initiatives

- **Visitor Exit survey**
- **Brand health**
- **Update tourism revenue estimates**

Thank you!