

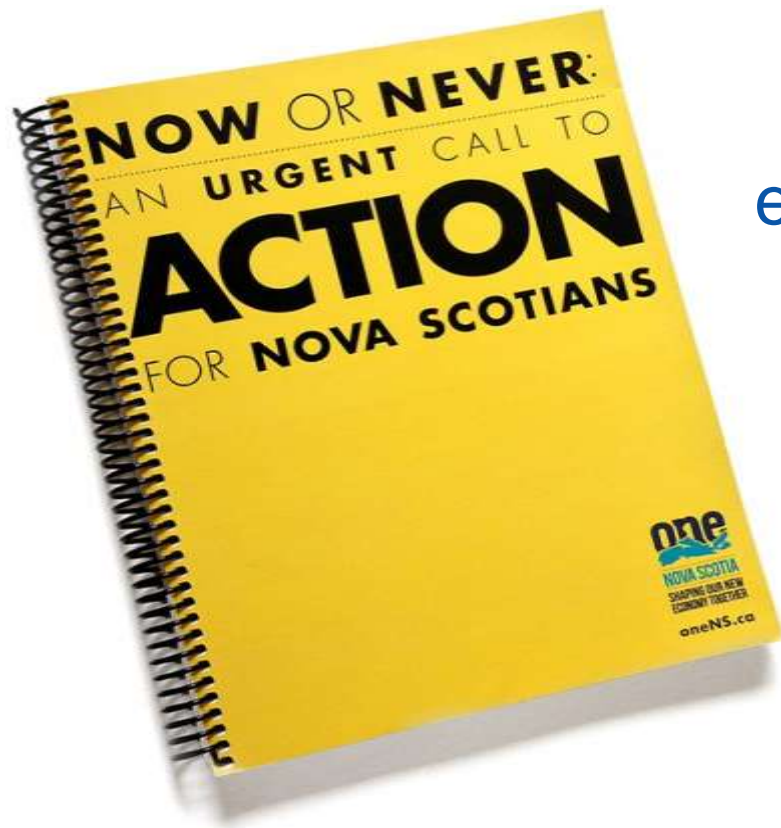


**On Target:
Creating
Experiences
with EQ**

November 22, 2016



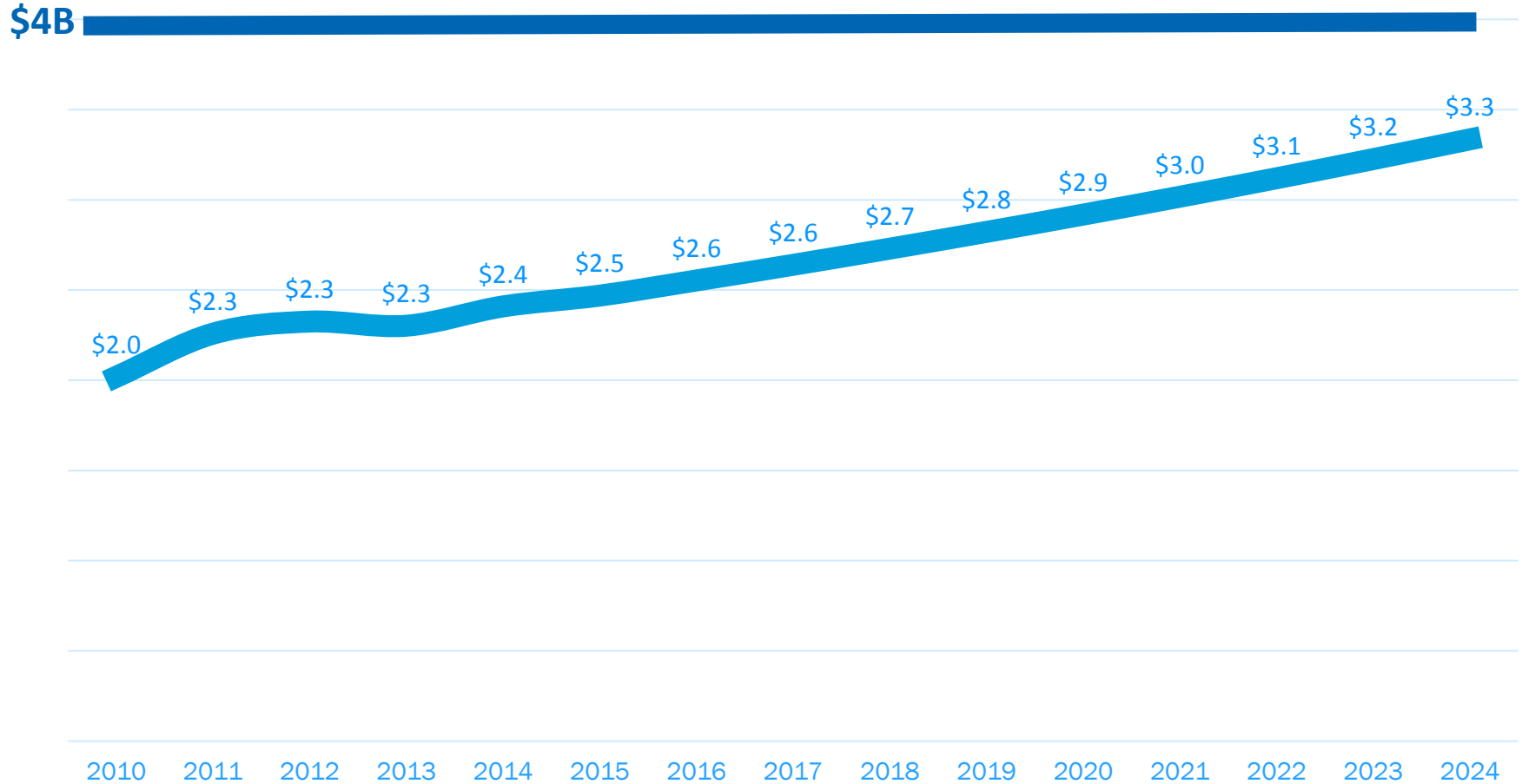
Our Goal: Tourism Expansion



As Nova Scotia's leading source of service sector exports, revenues from tourism will reach

\$4 billion by 2024

Revenue: Steeper Growth Needed to Reach \$4B



WORLD CLASS EXPERIENCES

Collaborate and Co-Invest



Tourism Nova Scotia's Strategy



Invest in markets of highest return.



Attract first-time visitors to Nova Scotia.



Focus on world class experiences.



Build Nova Scotia's Tourism confidence.

New is Necessary

Status quo growth will not get us to \$4B.

We will strategically elevate and grow existing and new opportunities and partnerships to create:

- New experiences
- New ways to experience our icons
- New icons to experience
- New media buzz
- New markets and visitors amplifying Nova Scotia

Shift: Experience Innovation

Elevate and Create World Class Experiences

- Focus on what motivates visitors to travel
- Partner with private sector to increase revenues
- Holistic experience development approach
- Increase industry capacity to develop experiences



Nova Scotia's World Class Experiences

World class experiences live the brand – they are magnetic and feature what is truly unique, differentiating and engaging about Nova Scotia to key global markets.



Explorer Quotient (EQ) Segments



Explorer Quotient

- Tourism Nova Scotia has licensed Destination Canada's segmentation approach, Explorer Quotient®
- Segments the market by travel values
- Moves away from more traditional demographic/activities-based segmentation

IMMEDIATE FOCUS



MID-TERM FOCUS



Target Segments

EQ Segment	NS Visitors	novascotia.com Visitors	Canadian Traveller Pop.
Authentic Experiencers	27%	29%	12%
Cultural Explorers	15%	23%	9%
Free Spirits	9%	12%	12%



Market Match



Cultural Explorers



Authentic Experiencers

Fortress of Louisbourg



Lunenburg UNESCO World Heritage Site



Sailing on Bluenose II



Good Cheer Trail



**INTRODUCING CANADA'S FIRST WINERY,
CRAFT BREWERY AND DISTILLERY TRAIL**

Halifax Citadel National Historic Site



Cooking on Farm with Kilted Chef



Whale Watching



Bay of Fundy -Tidal Bore Rafting





Free Spirits

Free Spirits & Travel

- Enjoy authentic local experiences – look for the highlights, connect with locals
- Love luxury and high-end experiences
- Travel is a time to escape their lives back home, have fun and indulge themselves
- Highly motivated to succeed and like to show off their success
- Love to share, highly social and open-minded, enjoy active adventure

Free Spirits

Love trips that:

- Offer fun, exciting experiences with learning on the side
- Make them feel pampered through luxuries
- Allow them to see all the main attractions



Free Spirits: Activities as Travel Motivators

- seeing beautiful coastline, beaches
- visiting well known natural wonders
- visiting national/provincial parks to see wildlife
- swimming/tubing/sunbathing
- staying at waterfront resorts
- visiting world heritage sites



Free Spirits & Marketing

- Use strong, direct, fun and lively messaging
- Address Free Spirit values:
 - show successful, stylish, younger people
 - emphasize fun and socializing
 - convey adventure and risk
 - speak to trying new things



Images for Free Spirits

- Show beautiful scenery, vibrant city scenes, large social gatherings and/or events, and stylish people having fun and being pampered
- Events and adventurous activities that they can participate in and enjoy with others more appealing than observational activities.

Developing World Class Experiences



















Experience Development Team Focus

World Class Experiences:

- identifying opportunities
- informing through research
- initiating experience development with industry operators, and
- influencing through coaching, advice and connections:
 - sales/media/marketing channels
 - businesses
 - municipalities, provincial and national partners



EXCELLerator Program

Development of **new** and **more** world class experiences targeting high-yield first time visitors is critical in reaching tourism revenue growth of \$4B by 2024

Experience Evolution

Experience Idea

Tourism Nova Scotia Experience EXCELLerator Program

World Class Experience

Shift: Focused on Visitor Travel Values

How do we know what visitors want?

We ask them.

Then we develop experiences with strategic partners that are on target with market values.

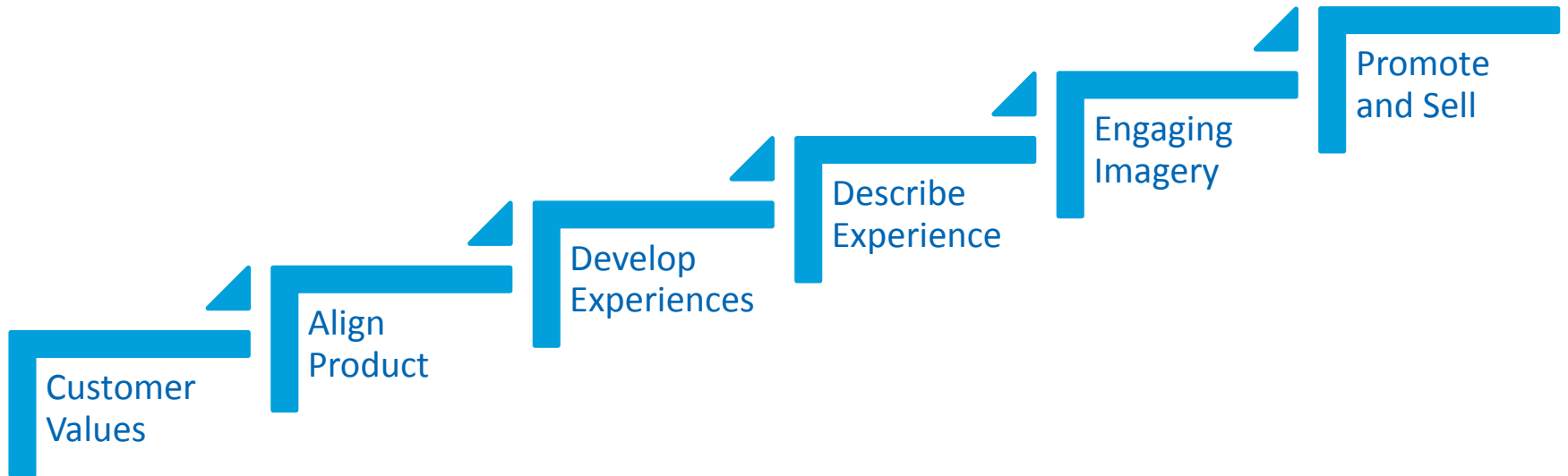


Shift: Co-Invest Model with Private Sector

- New Collaboration model
 - instead of funds out, co-invest funds in shared goal
 - business brings entrepreneurial spark, effort, resources
 - Tourism NS invests in research, experience coaching expertise, capture marketing assets
 - 3 year partnership in pilot program



Shift: Holistic Development Approach

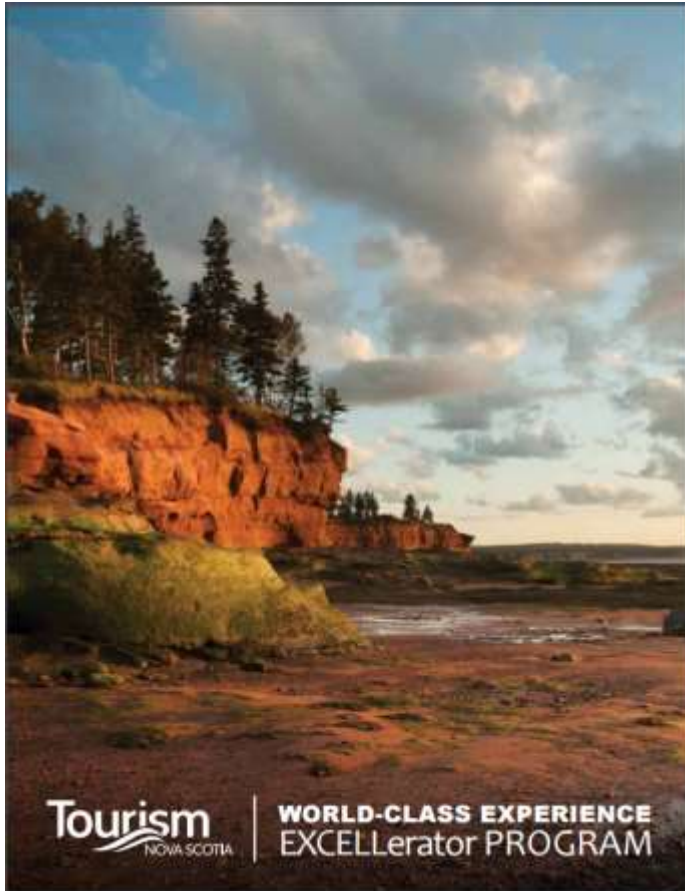


Shift: Increase capacity of businesses

- EQ Market insights workshop
- Experience development coaching
- Sales and trade insights



New Pilot: EXCELLerator Program Launched 2016



EXCELLerator concepts

Tourism Nova Scotia recently tested more than 20 EXCELLerator experience concepts with Free Spirits. The following have been identified as experiences with the greatest potential to motivate Free Spirits to visit Nova Scotia. How will you make one of these ideas shine?

Highest priority for development

Your Own Island Overnight Adventure

Imagine having one of the hundreds of islands that dot Nova Scotia's 2,600km coastline all to yourself! Bring your friends or family for a night of camping under the stars, lulled to sleep by the whispers of the waves. Don't worry about supplies – everything is provided – all you have to do is enjoy yourself. Wake up to sea breezes and fresh salt air, amazed by the beauty of your surroundings.

Nova Scotia's Ultimate Lobster Feast

Indulge in Nova Scotia's fresh lobster, prepared like you've never experienced! Foodies will delight in these expertly-prepared gourmet delicacies. Meet the lobster fishers and chefs, and get the inside story, from sea to table, of Nova Scotia's most famous food.

Taste of Halifax's Hottest Restaurants

Halifax loves foodies, and foodies love Halifax! Our restaurant culture celebrates the best of Nova Scotia's chefs, food, wineries, micro-breweries and craft distilleries. Explore Halifax's hottest restaurants on this exclusive tour showcasing the best food and drink in the heart of the city.

Lighthouse Wine Rooms of Taste

What better way to enjoy Nova Scotia's seafood bounty than prepared by a personal chef with a passion for local flavours, served to you in a stunning seaside setting at one of Nova Scotia's majestic and historic lighthouses. Capture a shot of these exquisite plates, sure to make your friends back home salivate!

Stellar Stargazing Feast and Nite

You haven't seen stars until you've seen them in Nova Scotia's designated dark sky zone. Fueled by a constellation-inspired feast featuring locally sourced food and drink, enjoy an exhilarating and star-studded night hike.



EXCELLerator Program | 2016

7

EXCELLerator Overview

- aligned with Free Spirit values
- focus on icons and underutilized assets
- existing operators seeking business growth



Benefits of EXCELLerator Collaboration

- Market Insights and EQ Training
- Experience development coaching
- Free-Spirit aligned marketing assets
- New experiential product for 2017
- Inclusion in Tourism Nova Scotia's marketing and promotion channels



EXCELLerator Timeline

- Announced program December 2015.
- Developed and tested experience concepts for free spirit segment appeal and ability to motivate travel to NS in early 2016.
- In April 2016, launched top 15 concepts to industry to apply to develop.
- Selected partners in May 2016.
- Experience focus: May-November 2016
- Goal: up to 10 new, market-ready world-class experiences to capture by fall 2016, sell in 2017 and market to Free Spirits in 2018.



Results

EXCELLerator Panelists



Stellar Stargazing Beach Feast

Donna Hatt, White Point



















Lighthouse Bites: Beacons of Taste

Angelo Spinazzola, North River Kayak



















Best of Halifax Foodie Adventure

Susan Downey Lim, Taste Halifax



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TASTE OF HALIFAX
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THE MYTH, THE LEGEND, THE REAL STORY OF

THE DONAIR

BEFORE PUTTING HALIFAX ON THE OCEANOGRAPHIC MAP, THE DONAIR WAS PASSED THROUGH SEVERAL OF THE WORLD'S NOTIONS AND CULTURES. HERE IS A BRIEF HISTORY OF THE DONAIR BEING MADE AT JOHNNY K'S.

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THE TRADITIONAL IDEAS TO INVENT
IT AS A COLD CUT OF MEAT AND
VEGETARIAN HISTORY OF HAMBURGERS.

1960

1960

THE G

TASTE HALIFAX
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Panelists Q&A: EXCELLerator Experience



What's working?

- Know why and how different people travel.
- Customer insights create more relevant and meaningful visitor experiences, added value.
- Guidance in implementing effective strategies that will advance business product development and marketing, with a goal of boosting profile and sales.
- Increasing our profile through media, influencers.
- Alignment with provincial and national tactics to grow tourism revenues.

Next for EXCELLerator Partners

- Finalize descriptions and confirm pricing
- Sale-abration – workshop on marketing, closing the sale and trade channels
- Leverage marketing and promotional opportunities
- Ongoing coaching
- Evaluation of pilot program

Program Evaluation

Process Evaluation

- Was the program implemented as intended?
- Did program activities achieve intended results?
- Could the program be run more efficiently?

Outcome Evaluation

- produced purchaseable EQ targeted experiences?
- were quality, EQ-aligned marketing assets created?
- created experience development tools which can be used by all industry, and to replicate this program in the future?
- have participants gained skills and knowledge?

In Development

- *Experience Nova Scotia: A Toolkit Refresh*
 - EQ segment insights
 - Updated worksheets
 - Market readiness assessment
 - Best practices
- EQ Insights for Industry
- EXCELLerator Program 2017



**Discover your EQ travel type at
<https://quiz.canada.travel/>**



Heather Yule
Experience Development
Tourism Nova Scotia
902-798-6768
heather.yule@novascotia.ca

Contact

www.tourismns.ca
www.novascotia.com

