

MARKET HIGHLIGHTS

NORTHEASTERN UNITED STATES

The **Northeastern US (NEUS)** is a significant US market, and accounts for close to one-half of overall US visitation to Nova Scotia. NEUS is comprised of the New England states (Massachusetts, Connecticut, Maine, New Hampshire, Rhode Island, and Vermont) and the Mid-Atlantic states (New Jersey, New York and Pennsylvania). Visitation has moderated in 2018 following four years of strong growth.



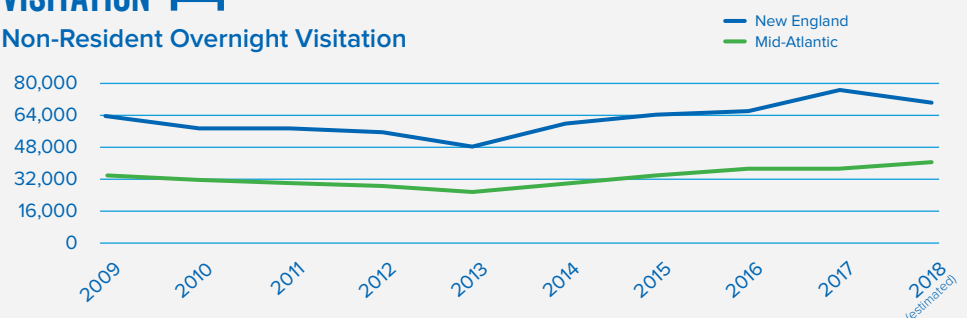
AVERAGE PLEASURE PARTY SPEND

New England
\$1,900

Mid-Atlantic
\$2,400

VISITATION

Non-Resident Overnight Visitation



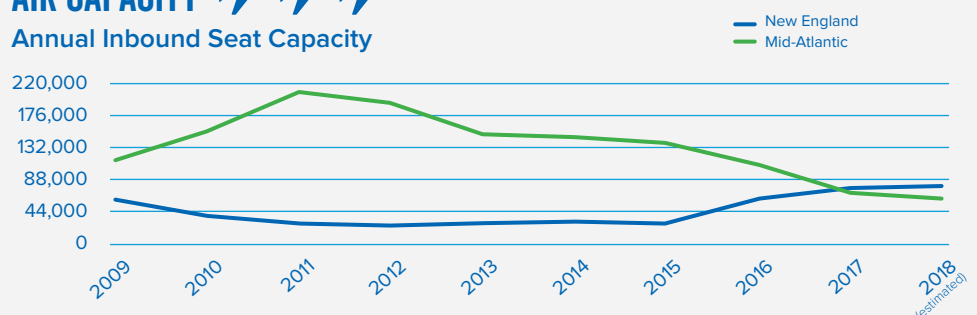
AVERAGE LENGTH OF STAY PLEASURE VISITORS

New England
7.5 nights

Mid-Atlantic
6.7 nights

AIR CAPACITY

Annual Inbound Seat Capacity

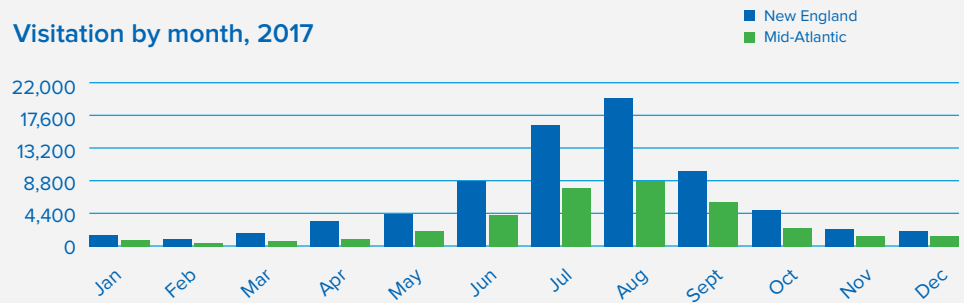




TRAVEL SEASON

Most visitation to Nova Scotia occurs between June and September.

Visitation by month, 2017



TRAVEL DECISION TIMELINE



How far in advance decision to visit NS was made (pleasure visitors):

New England:

Less than one month	16%
1–2 months	25%
3–4 months	25%
5 or more months	34%

Mid-Atlantic:

Less than one month	12%
1–2 months	28%
3–4 months	31%
5 or more months	29%

TARGET TRAVELLER SEGMENTS

The Explorer Quotient® (EQ) traveller segmentation approach helps identify and understand high-potential visitor prospects by understanding why people travel, why different types of travellers seek different experiences, and how tourism operators can engage with visitors based on their travel values. Tourism Nova Scotia has identified three key target visitor groups:

- **Authentic Experiencers:** These are understated travellers looking for authentic, tangible engagement with destinations. They prefer to do their own thing and having control over what they see and when they see it.
- **Cultural Explorers:** These are travellers who love to travel often and embrace continuous opportunities to discover and immerse themselves in the culture, people, and settings of their chosen destinations.
- **Free Spirits:** These are highly social and open-minded travellers. They are experimental and adventurous and will indulge in high-end experiences that are shared with others.

APPEAL OF NOVA SCOTIA

Nova Scotia is a strong match for what visitors from the Northeastern US look for in a vacation. These visitors love to visit places that allow them to:



Experience local cuisine



Visit historic sites



Stroll around to observe buildings & architecture



Visit natural attractions



Tour the countryside





NORTHEASTERN US SWOT ANALYSIS

STRENGTHS

- Significant US market
- Strong product match
- New England's proximity to NS allows for easy access via air, road and ferry
- Favourable exchange rate
- Primary market for Atlantic Canada Agreement on Tourism
- Largest cruise market for NS
- NS advertising is compelling and highly effective
- NS is top Atlantic Canadian province of choice
- Appeal of legal cannabis
- Digital Content Marketing Program helps extend reach

WEAKNESSES

- Limited traveller knowledge of the breadth of available activities in NS
- Difficult to break through the advertising clutter in such a highly-competitive market
- Challenging to differentiate product offerings from nearby locations (e.g., Maine)
- Natural inclination for Americans to consider in-country travel before travel to Canada
- Passport required (only 40% of Americans have passports)
- Seasonal – visitation primarily occurs June-September

OPPORTUNITIES

- Increase air capacity
- Improve product differentiation from New England
- Highlight Halifax as an urban destination
- Significant room to grow this market through increased awareness

THREATS

- Inconsistency of funding sources for marketing investment
- Exchange rate volatility
- Global affairs and potential restrictions on cross-border movement
- Long-term consistency of ferry routes

TOURISM NOVA SCOTIA (TNS) MARKETING AND TRADE ACTIVITIES

- **Travel Trade FAM Tours:** TNS introduces travel agents, reservation agents, tour operators, wholesalers, and group leaders from throughout North America, Europe, and China to experience NS for themselves.
- **Travel Media Press Trips:** These trips promote NS tourism products through national and international media.
- **Direct-to-Consumer Advertising:** TNS runs a direct-to-consumer campaign targeting the NEUS comprising of TV, digital video, display, search engine marketing and social media.
- **Marketing Partnerships:** TNS partners with Atlantic Canada Agreement on Tourism and Destination Canada to run a direct to consumer campaign in the NEUS. The 2018 campaign was a digital buy consisting of digital video, display, social media and influencer content.

OPPORTUNITIES FOR INDUSTRY

For more information, please contact
tourismdevelopment@novascotia.ca
TourismNS.ca

MARKETING OPPORTUNITIES

- **Doers & Dreamers Guide:** Industry can purchase advertising and receive a free listing.
- **Novascotia.com:** Free listings for those in the Doers & Dreamers Guide as well as free package and event listings.
- **E-newsletter:** Opportunity for industry coverage in e-newsletter distributed to about 50,000 potential visitors.
- **Social Media Channels:** Operators can use #VisitNovaScotia to be featured in Nova Scotia tourism posts on Facebook, Instagram, Twitter, and YouTube.
- **Digital Content Marketing Program:** A co-investment program to extend partners' marketing reach and develop marketing assets.
- **Barberstock:** Free access to Tourism Nova Scotia's video and photo assets, and a database where operators can share their digital assets.

TRADE OPPORTUNITIES

*Registration fees and travel costs responsibility of operators unless otherwise noted

- **Rendez-vous Canada:** Canada's largest travel marketplace allows qualified tourism businesses to meet with international tour operators in one-on-one, pre-scheduled appointments.
- **GoMedia Marketplace:** Destination Canada's premier international media marketplace attracts over 120 qualified media from Canada and international markets. Operators can meet with media and pitch stories about their destination or experience, and attend educational seminars and networking sessions.
- **Atlantic Canada Showcase:** Qualified tourism businesses can promote their products and experiences to national and international buyers.
- **American Bus Association (ABA):** Opportunity to meet with North American tour operators (predominately US) in one-on-one meetings.
- **New England Cruise Symposium:** This cruise conference focuses on the ports and destinations of the Canada-New England cruise corridor.
- **National Tour Association (NTA) Travel Exchange:** Travel Exchange brings tourism professionals from all industry sectors together in one location. NTA's annual convention features buyers of all sizes who package travel to, from, and within North America.
- **Tour Operator Partnership Program:** This program provides opportunities for Nova Scotia-based tour operators to partner in the strategic marketing of packaged Nova Scotia products in key markets.

DEVELOPMENT OPPORTUNITIES

- **World-Class Experience EXCELLerator Program:** Operators can collaborate in developing experiences that create a buzz and inspire first-time visitors to travel to Nova Scotia. Participants benefit from one-on-one coaching, research insights, professional development, photo and video production, and more.
- **Experience Development Toolkit:** From tips on curating and promoting experiences, to information on marketing activities – this kit contains practical tools and worksheets to inform experience development and grow business.
- **Industry Outreach and Coaching:** Through workshops, an online tourism planning guide, actionable destination development insights, and the Explorer Quotient® market segmentation tool – TNS can advise on the importance of authenticity and differentiation to growing tourism.
- **Atlantic Canada Travel Trade Readiness Program:** This program equips operators with tactics, processes, and best-practices on how to develop and expand their business through travel trade workshops, mentoring, webinars, and the Travel Trade Readiness Toolkit.