

MARKET HIGHLIGHTS

QUEBEC



Quebec is the closest Canadian market to Nova Scotia outside of Atlantic Canada, and a significant percentage of these visitors drive to the province (74%), rather than fly (26%). There has been strong visitation growth from Quebec in the past four years. Following an exceptionally strong 2017, which saw a 22% increase, visitation has moderated in 2018.

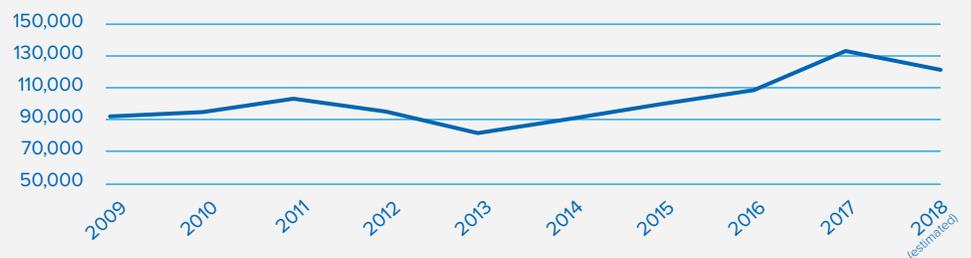


AVERAGE PLEASURE PARTY SPEND

\$1,700

VISITATION

Non-Resident Overnight Visitation

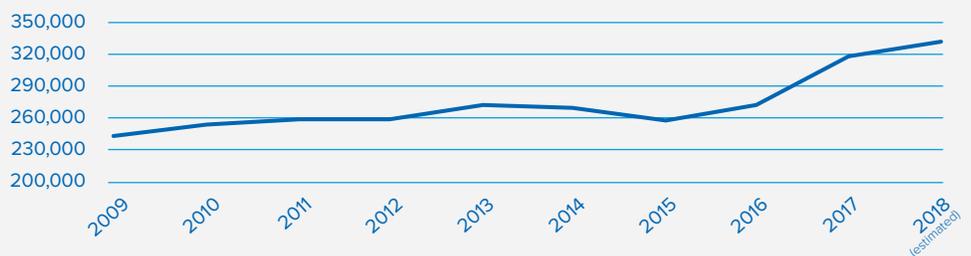


AVERAGE LENGTH OF STAY PLEASURE VISITORS

6.9 nights

AIR CAPACITY

Annual Inbound Seat Capacity



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.
- **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.
- **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.
- **Travel Media Association of Canada Marketplace (TMAC):** TMAC's annual two-day marketplace provides an opportunity to meet with top professional travel writers, bloggers, photographers, videographers and tourism industry experts in one-on-one meetings, as well as attend professional development and networking sessions.

DEVELOPMENT OPPORTUNITIES

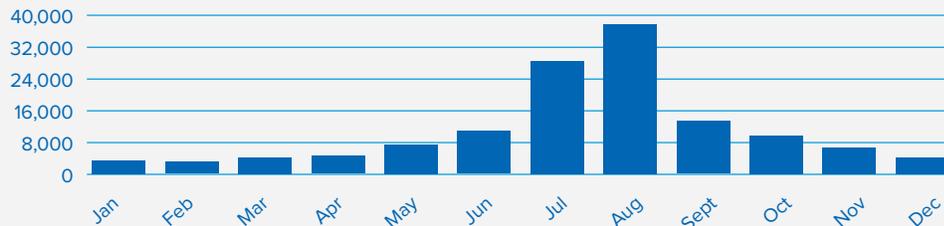
- **World-Class Experience EXCELLerator Program:** Operators can collaborate in developing experiences that create a buzz and inspire first-time visitors to travel to Nova Scotia. Participants benefit from one-on-one coaching, research insights, professional development, photo and video production, and 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.



TRAVEL SEASON

Most visitation to Nova Scotia occurs between June and October.

Visitation by month, 2017



TRAVEL DECISION TIMELINE



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

Quebec:

| | |
|---------------------|-----|
| Less than one month | 32% |
| 1–2 months | 23% |
| 3–4 months | 21% |
| 5 or more months | 21% |



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 Quebec look for in a vacation. These travellers love to visit places that allow them to:



Discover local food and drink



Visit historic sites and cultural attractions



Explore beautiful seacoasts



Take part in activities that allow them to experience the great outdoors



Experience a destination beyond the major attractions



QUEBEC SWOT ANALYSIS

STRENGTHS

- Close proximity – easy access by road and air
- Strong product match
- Acadian French history
- Digital Content Marketing Program helps extend reach
- NS advertising is compelling and effective, relative to the limited investment

WEAKNESSES

- Underdeveloped market; represents a relatively small investment in comparison to Ontario
- Past investment has been inconsistent
- Difficult to break through advertising clutter in such a highly-competitive market
- Perceived lack of differentiation between New Brunswick and Nova Scotia product – travellers often do not drive past New Brunswick
- Visitation is seasonal – primarily occurs June-October
- Limited French assets, e.g., French e-newsletter
- Marketing not tailored specifically for Quebecers

OPPORTUNITIES

- Develop marketing campaigns specifically for Quebecers
- Increase awareness and reach through consistent presence and enhanced investment
- Improve differentiation between New Brunswick and Nova Scotia offerings

THREATS

- Gas price volatility
- Potentially difficult to compete if New Brunswick increases marketing investment
- Stronger Canadian dollar could increase attractiveness of cross-border travel

TOURISM NOVA SCOTIA (TNS) MARKETING AND TRADE ACTIVITIES

- **Travel Trade FAM Tours:** TNS invites 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:** Direct-to-consumer advertising is the leading strategy in Quebec. The 2018 campaign included a content partnership with Les Chefs!, TV, digital video, display, and search engine marketing (SEM).
- **Marketing Partnerships:** TNS co-invests with industry partners through the Digital Content Marketing Program to extend the reach of Nova Scotia's message in Quebec.