

MARKET HIGHLIGHTS

NORTHEASTERN UNITED STATES

The **Northeastern US** is a significant US market, and accounts for close to one-half of overall US visitation to Nova Scotia. In the Northeastern US, Tourism Nova Scotia targets the New England states (Massachusetts, Connecticut, Maine, New Hampshire, Rhode Island, and Vermont) and the Mid-Atlantic states (New Jersey, New York, and Pennsylvania). Visitors from these two regions have different characteristics, such as how they travel to the province as well as how much they spend while they are here. Visitation to Nova Scotia from these regions increased by 46% between 2013 and 2018. Visitation has moderated in 2019.



NORTHEASTERN US KEY FACTS



110,300 VISITORS from Northeastern US in 2018



New England | Mid-Atlantic
80% | **58%**
Drive to Nova Scotia
🕒 1-2 DAYS



4.6%
of Nova Scotia VISITORS



46%
VISITATION GROWTH
2013-2018



New England | Mid-Atlantic
20% | **42%**
Fly to Nova Scotia
🕒 1.5-3 HOURS

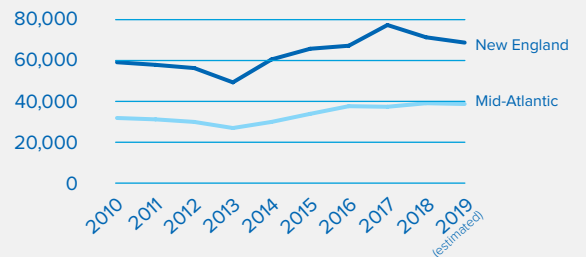
Airports with service to Nova Scotia:
NEW YORK LAGUARDIA
NEWARK
PHILADELPHIA
BOSTON



165,800
AVAILABLE SEATS
on non-stop flights
to Nova Scotia (2019)

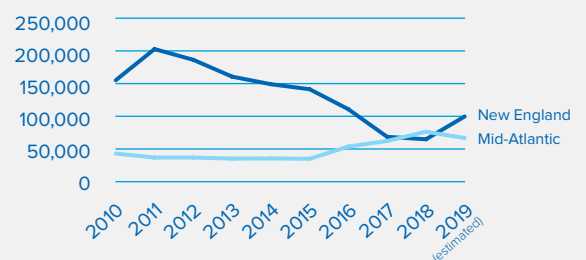
VISITATION

Non-Resident Overnight Visitation



NON-STOP AIR CAPACITY

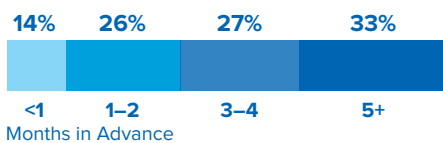
Annual Inbound Seat Capacity to Nova Scotia



CHARACTERISTICS OF NORTHEASTERN US PLEASURE VISITORS

Tourism Nova Scotia works to attract people travelling for pleasure. These visitors are more likely to stay in paid accommodations and spend more during their trip than those visiting friends and relatives. 73% of visitors from the Northeastern US are pleasure visitors.

WHEN THEY DECIDE TO VISIT NOVA SCOTIA



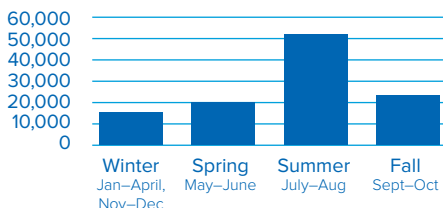
HOW THEY BOOK



WHEN THEY VISIT

Most visitors (79%) come to Nova Scotia between June and October.

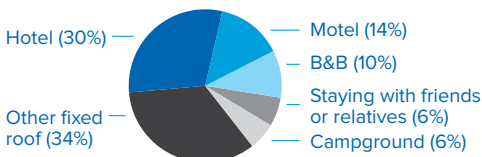
Visitation by Season (2018)



AVERAGE LENGTH OF STAY



WHERE THEY STAY



AVERAGE SPEND PER TRIP



TARGET TRAVELLER SEGMENTS

The Explorer Quotient® (EQ) traveller segmentation approach helps identify and understand why people travel, why different types of travellers seek different experiences, and how tourism operators can engage with visitors based on their travel preferences. Tourism Nova Scotia has identified three key target traveller segments. While all three groups are interested in Nova Scotia's local food, seek authentic experiences, and enjoy natural beauty, traveller segments differ in how they prefer to experience these elements. Operators can consider how these target segments are attracted, or could be attracted, to their business.

Authentic Experiencers:

- Travel for learning and personal development
- Prefer to do their own thing and explore off-the-beaten-path, away from crowds
- Like to be immersed in the local culture and history
- Don't need to be pampered; prefer to blend in with the locals

Cultural Explorers:

- Travel for discovery and shared learning experiences
- Value connecting with local culture, including festivals and events
- Enjoy outdoor adventures with fun companions
- Like to explore hidden gems
- Spontaneous travellers

Free Spirits:

- Travel for fun and escape
- Seek adventure and excitement; like to try new things
- Seek the best they can afford; will indulge on vacation
- Pack a lot into their itineraries; want to take in all the main attractions
- More likely to participate in group travel

WHAT THEY LIKE TO DO IN NOVA SCOTIA



Eat lobster



Go hiking



Explore beaches



Enjoy coastal sightseeing



Visit museums/historic sites



Visit wineries, breweries, and distilleries



Visit Halifax Waterfront



Visit Peggy's Cove



Visit UNESCO sites

NORTHEASTERN US SWOT ANALYSIS

STRENGTHS

- Northeastern US is the largest US market and largest target market outside of Canada
- Nova Scotia offers many things that appeal to travellers from the Northeastern US
- New England's proximity to Nova Scotia allows for easy access via air, road, and ferry
- Four airports with frequent, short flights to Nova Scotia
- Favourable exchange rate
- Primary market for the Atlantic Canada Agreement on Tourism
- Strong alignment with Destination Canada target travellers
- Largest cruise market for Nova Scotia
- Nova Scotia advertising is considered compelling and highly effective
- Nova Scotia is top Atlantic Canadian province of choice
- Digital marketing tactics developed with industry partners through the Digital Content Marketing Program have increased awareness

WEAKNESSES

- Limited traveller knowledge of the breadth of available activities in Nova Scotia
- Highly competitive advertising market; difficult to break through the clutter
- 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 42% of Americans have passports)
- Visitation is primarily seasonal (79% of visitation occurs June—Oct)

OPPORTUNITIES

- Increase air capacity
- Gain greater reach in market with increased marketing investment
- Improve product differentiation from New England
- Significant room to grow this market through increased awareness
- Increase promotion of Nova Scotia offerings where travellers are looking for information, such as online booking platforms
- Increase the variety of compelling experiences to motivate visitation during peak and off-peak months
- Take advantage of Destination Canada's goal of increasing travel to less-visited parts of Canada
- Stabilize Yarmouth-Maine ferry schedule

THREATS

- Increased marketing investment by competing travel destinations
- Gas price volatility
- Cost of air travel
- Exchange rate volatility
- Global affairs and potential restrictions on cross-border movement
- Long-term consistency of ferry routes

TOURISM NOVA SCOTIA MARKETING AND TRADE ACTIVITIES

Consumer-focused Advertising

Tourism Nova Scotia's consumer-focused marketing activities generate awareness of, and interest in, Nova Scotia as a travel destination.

- **Consumer Advertising:** Tourism Nova Scotia runs a consumer campaign targeting the NEUS comprising of TV, direct-to-consumer digital activities including video, display, search engine marketing, and social media.
- **Marketing Partnerships:** Tourism Nova Scotia partners with the Atlantic Canada Agreement on Tourism and Destination Canada to run a direct-to-consumer campaign in the Northeastern US. The 2019 campaign was a digital buy consisting of digital video, display, social media, and influencer content. Tourism Nova Scotia invests with partners through the Digital Content Marketing Program to develop digital marketing tactics and content to increase awareness of Nova Scotia.

Travel Media and Travel Trade

Tourism Nova Scotia's travel media and travel trade activities leverage partnerships to create awareness of Nova Scotia, develop and sell travel packages, and inspire people to visit Nova Scotia.

- **Travel Trade Familiarization (FAM) Tours:** Tourism Nova Scotia hosts travel agents and tour operators from throughout North America, Europe, and China to experience Nova Scotia for themselves so they may develop Nova Scotia itineraries and travel packages.
- **Travel Media Press Trips:** Journalists and influencers visit Nova Scotia so they can promote Nova Scotia tourism products through national and international travel media.
- **Media and Travel Trade Marketplaces:** Tourism Nova Scotia promotes Nova Scotia through participation in media and travel trade marketplaces in the US.

OPPORTUNITIES FOR INDUSTRY

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

Tourism Nova Scotia encourages tourism operators to take advantage of the many opportunities available for marketing, working with the travel trade, and business development.

MARKETING OPPORTUNITIES

- **Doers & Dreamers Guide:** Industry can purchase advertising in addition to receiving a free listing.
- **Novascotia.com:** Opportunity to purchase advertising and free business, package, and events listings for those in the Doers & Dreamers Guide.
- **Social Media Channels:** Operators can use the #VisitNovaScotia hashtag to be featured in Nova Scotia tourism posts on Facebook, Instagram, Twitter, and YouTube.
- **Digital Content Marketing Program:** Operators can co-invest with Tourism Nova Scotia to develop digital marketing assets and tactics to extend their marketing reach.
- **Barberstock:** Free access to Barberstock, Tourism Nova Scotia's online library of videos and photos. Operators can also use Barberstock to easily share their videos and photos with travel trade and travel media.

TRAVEL TRADE AND MEDIA OPPORTUNITIES

- **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.
- **Tour Operator Partnership Program:** This program provides opportunities for Nova Scotia-based tour operators to partner in the strategic marketing of Nova Scotia travel packages in key markets.
- **New England Cruise Symposium:** This cruise conference focuses on the ports and destinations of the Canada-New England cruise corridor. The symposium is an opportunity for 200 industry delegates representing ports, cruise lines, tourism agencies, government, and tour operators to share their experiences, build relationships, and discover the newest trends in cruising.
- **National Tour Association:** This seller-seated marketplace allows buyers and sellers to meet for 10 minute appointments. It is hosted by the National Tourism Association, a business association for professionals serving customers traveling to, from, and within North America. It has 700 buyer members consisting of tour operators and travel planners who package travel products domestically and around the world.
- **United States Tour Operator Association:** This annual members-only marketplace is an opportunity to meet one-on-one with representatives from worldwide tour operators.

BUSINESS AND EXPERIENCE DEVELOPMENT OPPORTUNITIES

- **World-class Experience EXCELLerator Program:** Operators can collaborate with Tourism Nova Scotia to develop experiences that build buzz and inspire travellers to visit 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 creating experiences, to information on marketing activities, this kit contains practical tools and worksheets to inform experience development and business growth.
- **Industry Outreach and Coaching:** Tourism Nova Scotia provides advice through workshops, online tourism planning guides, and the Explorer Quotient® market segmentation tool.
- **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.