

MARKET HIGHLIGHTS QUEBEC



Quebec is the closest Canadian market to Nova Scotia outside of Atlantic Canada. A significant percentage of visitors from Quebec drive to the province (69%). Following four years of strong growth between 2013 and 2017 (+60%), and a particularly strong 2017 (+22%), visitation has moderated in 2018 and 2019.

QUEBEC KEY FACTS



119,700 VISITORS from Quebec in 2018



69%

Drive to Nova Scotia

 1-2 DAYS



5%

of Nova Scotia VISITORS



45%

VISITATION GROWTH 2013-2018



31%

Fly to Nova Scotia

 1.5 HOURS



Airports with service to Nova Scotia:

MONTREAL

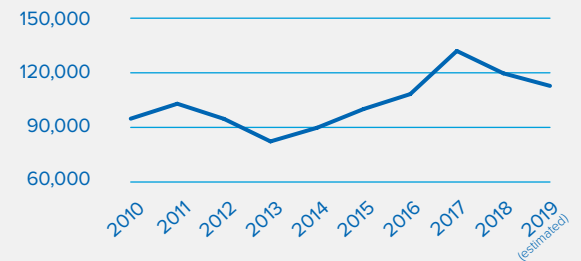


312,100

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

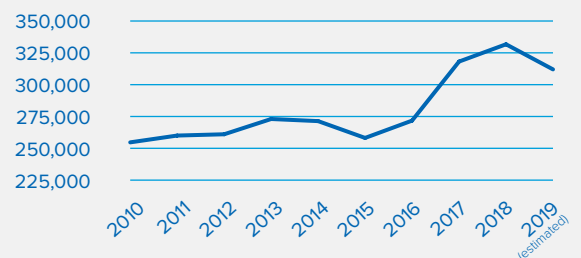
VISITATION

Non-Resident Overnight Visitation



NON-STOP AIR CAPACITY

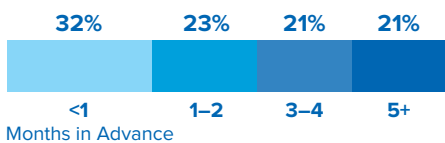
Annual Inbound Seat Capacity to Nova Scotia



CHARACTERISTICS OF QUEBEC 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. 58% of visitors from Quebec are pleasure visitors.

WHEN THEY DECIDE TO VISIT NOVA SCOTIA



HOW THEY BOOK

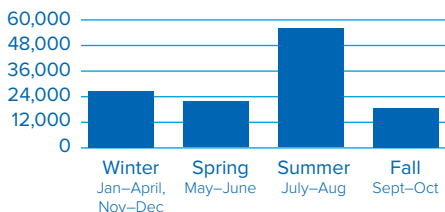


71%
made an
online booking

WHEN THEY VISIT

Most visitors (71%) come to Nova Scotia between June and October.

Visitation by Season (2018)

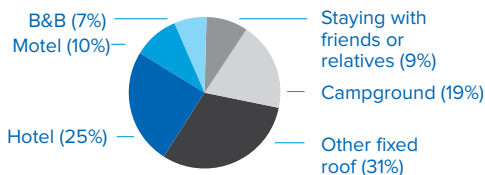


AVERAGE LENGTH OF STAY



6.9
nights

WHERE THEY STAY



AVERAGE SPEND PER TRIP



\$1,700
per party

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

QUEBEC SWOT ANALYSIS

STRENGTHS

- Close proximity—easy access by road and air
- Frequent, short flights from Montreal to Nova Scotia
- Acadian French history connection
- Digital marketing tactics developed with industry partners through the Digital Content Marketing Program have increased profile of Nova Scotia in this market
- Nova Scotia advertising is considered compelling
- Nova Scotia offers many things that appeal to Quebec travellers

WEAKNESSES

- Underdeveloped market; represents a relatively small investment in comparison to Ontario
- Investment in this market has been inconsistent
- Highly competitive advertising market; difficult to break through the clutter
- Perceived lack of differentiation between New Brunswick and Nova Scotia product; travellers often do not drive past New Brunswick
- Visitation is primarily seasonal (71% of visitation occurs June—Oct)
- Limited French assets, such as a French e-newsletter or social media
- Marketing not tailored specifically for the Quebec market

OPPORTUNITIES

- Develop marketing campaigns specifically for the Quebec market
- Increase awareness and reach through enhanced investment
- Increase partnerships with private and public sector to expand marketing reach
- Increase promotion of Nova Scotia offerings where travellers are looking for information, such as online booking platforms
- Improve differentiation between New Brunswick and Nova Scotia offerings
- Increase the variety of compelling experiences we offer to motivate visitation during peak and off-peak months

THREATS

- Gas price volatility
- Cost of air travel
- Increased marketing investment by competing travel destinations, particularly New Brunswick
- Stronger Canadian dollar could increase attractiveness of travel to US

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:** Consumer advertising is the leading strategy in Quebec. The 2019 campaign included a content partnership with *Les Chefs!*, TV, and direct-to-consumer digital activities including video, display, and search engine marketing (SEM).
- **Marketing Partnerships:** 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 Quebec.

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.
- **Travel Media Association of Canada Marketplace:** This 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.

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.