

MARKET HIGHLIGHTS

CHINA

China is one of Canada's fastest growing tourism markets. 2017 was a record-breaking year for visitation to Canada from China, with close to 700,000 visitors to Canada from this market.



The average visitor from China spends \$2,400 in Canada, making China Canada's second largest market in terms of visitor spending.



Nova Scotia is poised to become the “next hotspot” in Canada for Chinese visitors.

Nova Scotia has what Chinese travellers are looking for – lobster, wine, incredible star viewing, marine life watching, coastal sight-seeing, and World Heritage sites. Nova Scotia offers the comfort, luxury, safety, and active adventures that Chinese travellers enjoy.



Visitors from China are highly dependant on tour operators and travel agents to inform their travel decisions. Tourism Nova Scotia has a travel trade-focused approach in this market.



Tourism Nova Scotia is developing a means to collect and estimate visitation data on China, such as average length of stay, average party spend, travel season, and booking habits.



There are currently no direct flights from China, and thus no air capacity.



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



Enjoy local food experiences



Visit World Heritage sites



Experience things they can't experience at home



Enjoy beautiful outdoor scenery and landscapes



Participate in summer outdoor activities

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.
- **In-Market Representative:** The in-market representative provides a wide range of tourism marketing services, including leveraging tour operators and travel writers/influencers to build awareness of Nova Scotia and encourage visitors to move along the sales journey to decide to visit Nova Scotia.
- **Direct-to-Consumer Advertising:** TNS partners with Destination Canada and Tourism International Market Expansion to run direct-to-consumer advertising in China. The campaign includes content from key opinion leaders and pushes interest to key tour operators who can close the sale.

CHINA SWOT ANALYSIS

STRENGTHS

- Strong product match
- NS is a short flight for Chinese visitors entering Canada via Montreal or Toronto
- In-market representation established in 2018
- Relations with China is a cross-department provincial priority through the Nova Scotia China Engagement Strategy led by Intergovernmental Affairs
- NS universities have high number of international students from China
- Awareness of NS being built through education and immigration initiatives

WEAKNESSES

- Visitation is seasonal – preference for summer months
- Low awareness of NS and product offerings
- No direct flights
- Limited marketing budget
- Difficult to break through the advertising clutter in such a highly-competitive market
- Language barrier and shortage of translated content
- Visa requirements
- Lack of industry market-readiness
- High cost to travel to Canada and NS
- Lack of new, high-end hotels
- TNS currently has limited data on spending and visitation patterns of Chinese travellers

OPPORTUNITIES

- Strong visitor and expenditure growth forecasts for Canada
- Continue promoting awareness of place and products through increased marketing investment
- Significant potential for NS to attract visitors from China based on product offering
- Visa accessibility improving through the 11 new visa application centres recently opened across China
- Leverage strong Canada brand
- Leverage learning and connections from the Nova Scotia China Engagement Strategy and trade missions
- Develop air access
- Develop methods to better estimate Chinese visitation and spending patterns

THREATS

- Geopolitical uncertainty
- Exchange rate volatility



OPPORTUNITIES FOR INDUSTRY

For more information, please
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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.
- **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.
- **Showcase Canada:** This is an opportunity for Canadian suppliers to meet one-on-one with over 100 qualified buyers from China.

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.