

MARKET HIGHLIGHTS

CHINA



China is one of Canada's fastest growing tourism markets. 2018 was a record-breaking year for visitation, with visitation to Canada surpassing 700,000 for the first time. Nova Scotia is poised to become the "next hotspot" in Canada for Chinese travellers. Tourism Nova Scotia has identified visitation from China as a key opportunity for tourism growth, with an ambitious goal of increasing visitation from less than 5,000 visitors in 2018 to 50,000 visitors by 2024.

Tourism Nova Scotia is currently working to increase the amount of Nova Scotia-specific information related to visitors from China. Most of the available information and data applies to visitors to Canada as a whole.

CHINA KEY FACTS

NOVA SCOTIA VISITATION GOAL:
Increase visitation from

<5,000 in 2018 ➔ **50,000** by 2024



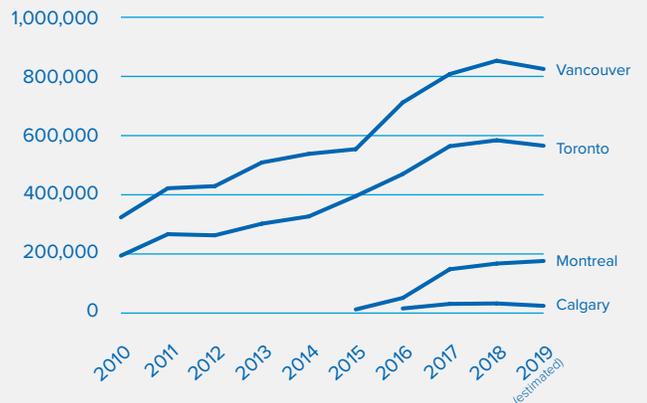
Short, frequent flights
to Halifax from:
TORONTO
MONTREAL

1,591,700

INBOUND SEATS
from China
TO CANADA
(2019)

NON-STOP AIR CAPACITY

Annual Inbound Seat Capacity to Canada



CHARACTERISTICS OF CHINA VISITORS TO CANADA

HOW THEY BOOK

Highly dependent on tour operators and travel agents to inform their travel decisions

95% **78%**

used these services for either research or booking

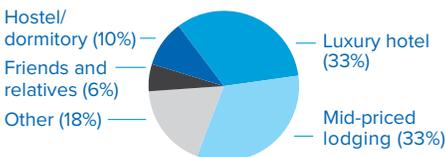
of leisure trips booked as part of an organized group travel package.

WHEN THEY VISIT

Visitation highest

June—Sept
(49% OF VISITATION)

WHERE THEY STAY



Staying in luxury hotels has become more popular in the past few years, while staying in a hostel/dormitory or with friends and relatives has declined.

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



Enjoy local food experiences



Enjoy beautiful scenery and landscapes



Participate in summer outdoor activities



Visit world heritage sites



Experience things they can't experience at home

CHINA SWOT ANALYSIS

STRENGTHS

- Nova Scotia offers many things that appeal to travellers from China
- Established in-market representative
- China is a provincial priority; the Nova Scotia—China Engagement Strategy is led by Intergovernmental Affairs
- Immigration and education initiatives are helping to build awareness of Nova Scotia
- Strong visitor and expenditure growth forecasts for Canada despite slight decline in 2019
- Canada has Approved Destination status
- Chinese visitors entering Canada via Montreal or Toronto are only a short flight to Nova Scotia

OPPORTUNITIES

- Develop air access
- Continue promoting awareness of Nova Scotia through increased marketing investment
- Significant potential for Nova Scotia to attract visitors from China based on product offering
- Visa accessibility improving through the 11 new visa application centres recently opened across China
- Leverage learning and connections from the Nova Scotia—China Engagement Strategy and trade missions
- Continue to promote interprovincial itineraries
- Increase understanding of China travellers
- Take advantage of Destination Canada's goal of increasing travel to less-visited areas
- Improve capacity to host Chinese visitors

WEAKNESSES

- Visitation is primarily seasonal; most travel occurs May to October
- Low awareness of Nova Scotia and its product offerings
- No direct flights to Nova Scotia
- Tourism Nova Scotia has limited marketing budget for China
- Highly competitive advertising market; difficult to break through the clutter
- Language barrier and shortage of translated content for travellers from China
- Travel visa required
- Limited industry readiness to host visitors from China
- High cost to travel to Canada and Nova Scotia
- Limited amount of luxury/modern products that appeal to Chinese travellers
- Limited data on spending and visitation patterns of Chinese visitors to Nova Scotia

THREATS

- Geopolitical uncertainty
- Exchange rate volatility
- Reduction of Destination Canada investment in China
- Cost of air travel

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.

- **Marketing Partnerships:** Tourism Nova Scotia partners with the Tourism International Market Expansion Program (TIME) to increase awareness of Nova Scotia through consumer marketing.
- **Consumer Advertising:** Tourism Nova Scotia runs a mix of consumer campaign tactics targeting key cities in China comprised of TV, radio, and direct to consumer digital activities including video, display, and social media.

Travel Media and Travel Trade

- **In-market Representative:** Tourism Nova Scotia's in-market representative provides a wide range of marketing services, including leveraging tour operators and travel writers/influencers to build awareness of Nova Scotia and encourage travellers to decide to visit Nova Scotia.
- **Trade Partnerships:** Tourism Nova Scotia partners with Destination Canada and TIME to develop, market, and increase sales of packaged product sold through China-based tour operators.
- **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 China.

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

- **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.
- **Showcase Canada Asia:** Destination Canada's Showcase Canada Asia provides an opportunity for Canadian sellers to meet with more than 100 key buyers from across China in a business-to-business marketplace with pre-scheduled appointments and networking events.

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.