

MARKET HIGHLIGHTS GERMANY

Germany represents a relatively small percentage of overall non-resident overnight visitation to Nova Scotia. However, growth in visitation from this high-value market has been strong in recent years. On average, overseas visitors stay in Nova Scotia longer and spend more than the average Canadian visitor.



**AVERAGE PLEASURE
PARTY SPEND***

\$4,400

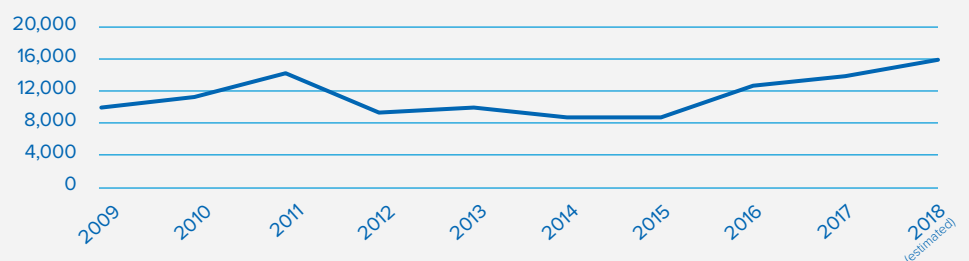


**AVERAGE LENGTH OF STAY
PLEASURE VISITORS***

9.5 nights

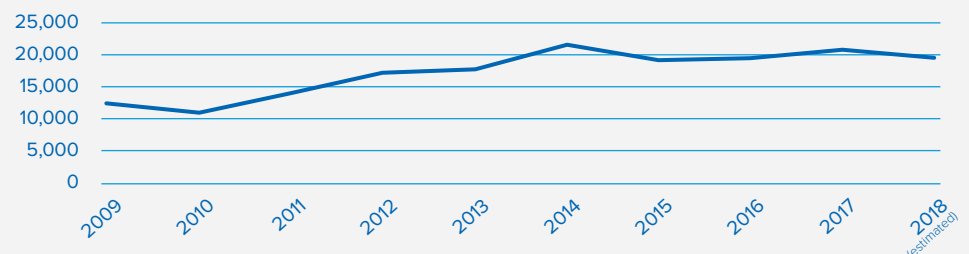
VISITATION

Non-Resident Overnight Visitation



AIR CAPACITY

Annual Inbound Seat Capacity



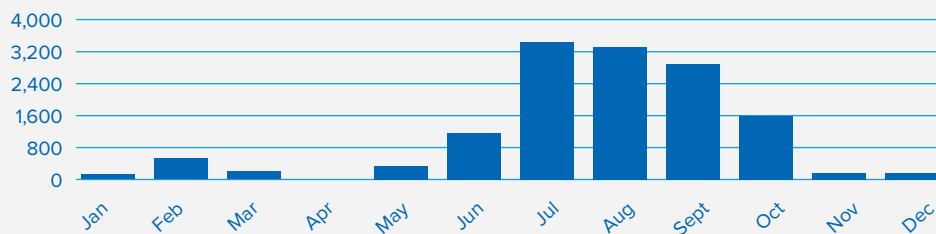
*Average overseas visitor party



TRAVEL SEASON

Although visitation is concentrated in the June-October months, visitors from Germany are more likely than other markets to visit during the fall shoulder season.

Visitation by month, 2017



TRAVEL DECISION TIMELINE*



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

Germany:

Less than one month	12%
1–2 months	9%
3–4 months	25%
5 or more months	51%

*Average overseas visitor party

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



Encounter locals who are friendly and welcoming



Explore off the beaten path



Experience nature-based activities



Enjoy beautiful outdoor scenery and landscapes



Tour around to enjoy multiple destinations



GERMANY SWOT ANALYSIS

STRENGTHS

- Strong product match
- Overseas visitors are highest value visitors
- Easy access via non-stop flights (4x weekly from Frankfurt seasonally)
- Strong Euro relative to Canadian dollar
- Strong visitation growth over past three years
- Strong marketing partnerships in market
- Established in-market representative
- More likely than other markets to visit in fall shoulder season – fall foliage is a major draw for German travellers

WEAKNESSES

- Visitation is seasonal – travel primarily occurs from June to October
- No direct flights outside of peak season
- Many Nova Scotia operators closed during off-peak months
- Direct-to-consumer activities limited due to available marketing budget
- Difficult to break through the advertising clutter in such a highly-competitive market
- Limited awareness of Nova Scotia

OPPORTUNITIES

- Growth of visitation via air
- Increase inventory of compelling shoulder season products and experiences
- High potential for Nova Scotia to attract travellers looking for “lesser-known” places in Canada

THREATS

- Sustainability of air routes
- Exchange rate volatility

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:** TNS, in partnership with the Halifax International Airport Authority, ran its largest direct-to-consumer advertising campaign to-date in 2018 – driving awareness of Nova Scotia as a travel destination and direct air routes. The campaign consists of digital video, digital display, and search engine marketing.
- **Marketing Partnerships:** TNS partners with Destination Canada and Tourism International Market Expansion to extend reach into this market through content marketing partnerships.
- **In-Market Representative:** The 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 visitors to move along the sales journey to decide to visit Nova Scotia.

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.
- **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.
- **International Tourism Bourse (ITB):** One of the world's leading travel fairs, this event in Berlin, Germany provides an opportunity to meet with tour operators, travel agents, meeting and incentive travel planners, and travel media. Nova Scotia's participation is in partnership with the other Atlantic Canada provinces and Destination Canada.

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.