

# Use New Tourism Nova Scotia Research to Tailor Your Experiences to Appeal to Regional Visitors

Tuesday, June 23, 2020

Presented by Anna Moran, Director of Research and Policy

Heather Yule, Manager of Experience Development

TOURISM  
NOVA SCOTIA 

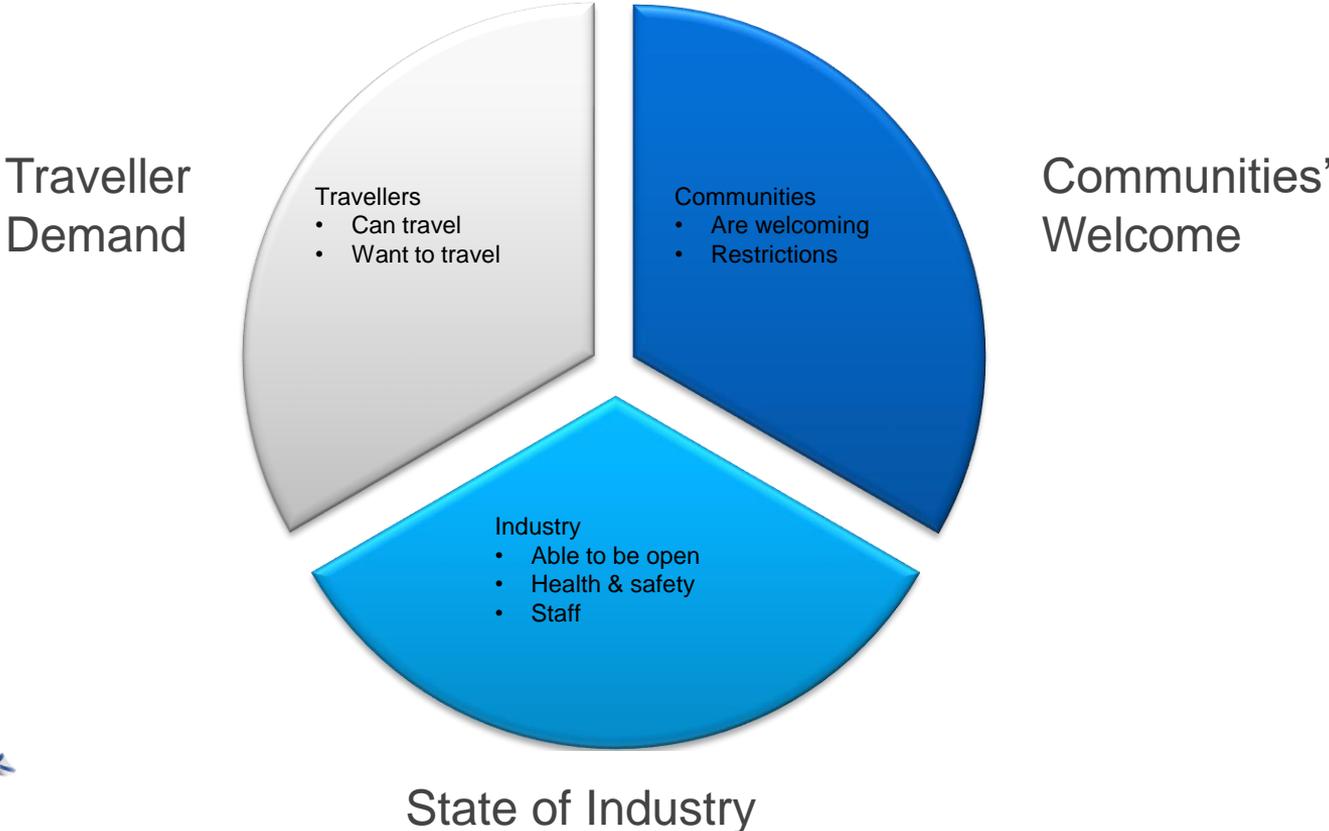
# Anna Moran, Director of Research and Policy, Tourism Nova Scotia

- Anna leads Tourism Nova Scotia's research programs to support evidence-based decision making across the organization, strategic and business planning, and TNS' performance measurement.  
Anna joined Tourism Nova Scotia in May 2014, following 20 years of experience in leveraging market research to inform strategic decision making.
- Most recently, Anna worked with Efficiency Nova Scotia, where she developed the organization's market research practice.
- Anna holds a Bachelor of Commerce degree from Mount Allison University.

# COVID-19 RESEARCH INSIGHTS

- Tourism recovery
- Nova Scotians travel within Nova Scotia
- NB/PE residents travel to Nova Scotia
- New NS/PE/NB traveller research
- Resident sentiment

# TOURISM RECOVERY



# TOURISM RECOVERY

- Research indicates travellers will start to travel close to home
- Nova Scotians spend:
  - \$800 million on travel within Nova Scotia
  - \$1.2 billion on travel outside of the province

LOCAL TRAVEL FIRST

# TOURISM RECOVERY

- Research indicates closer drive markets will be next
- Does not depend on air capacity
- One-half of visitors to NS are from Atlantic Canada
- Atlantic Canadians spend about \$400 million in Nova Scotia

## REGIONAL MARKETS NEXT

# TOURISM RECOVERY

- Further away Canada
- Air markets
- US/Overseas markets
- These markets have been important to tourism revenue

## FURTHER MARKETS LAST

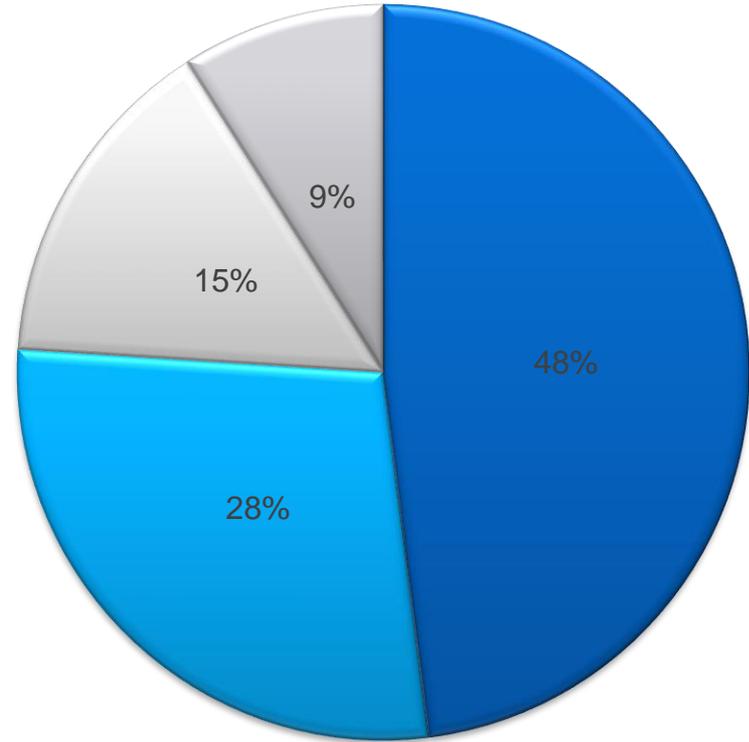


# TRAVELLERS FROM NOVA SCOTIA

TOURISM  
NOVA SCOTIA 

# TRAVELLERS FROM NOVA SCOTIA

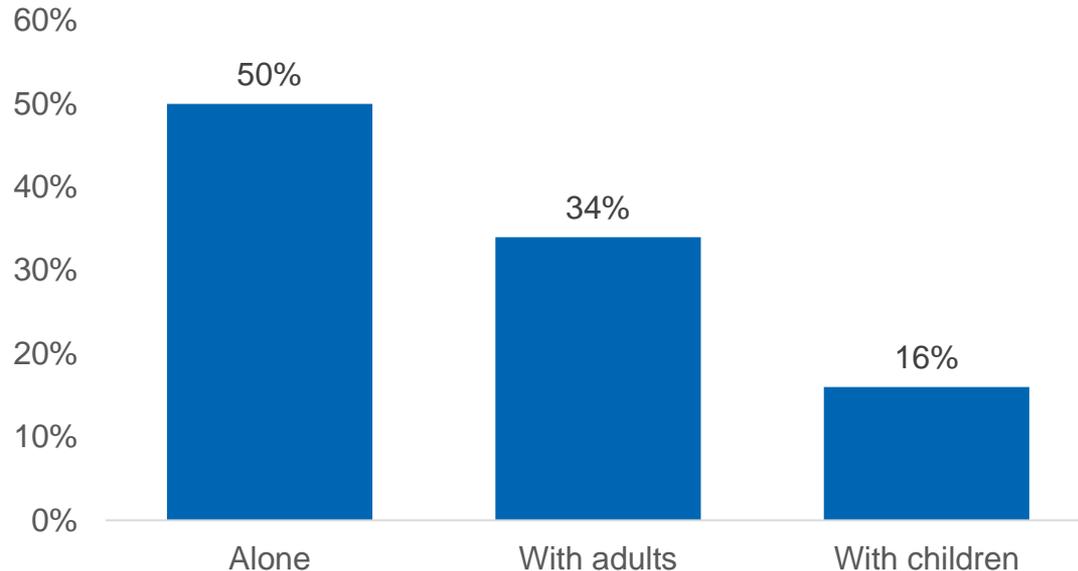
- 5.5 million trips in 2018
  - 4.2 million same-day
  - 1.3 million overnight
- \$800 million in spending



■ One night ■ Two nights ■ Three nights ■ Four+ nights

# NOVA SCOTIAN TRAVEL PARTIES

- Nova Scotians most likely to travel alone, but a significant number of trips are with other adults only (primarily couples), or with children

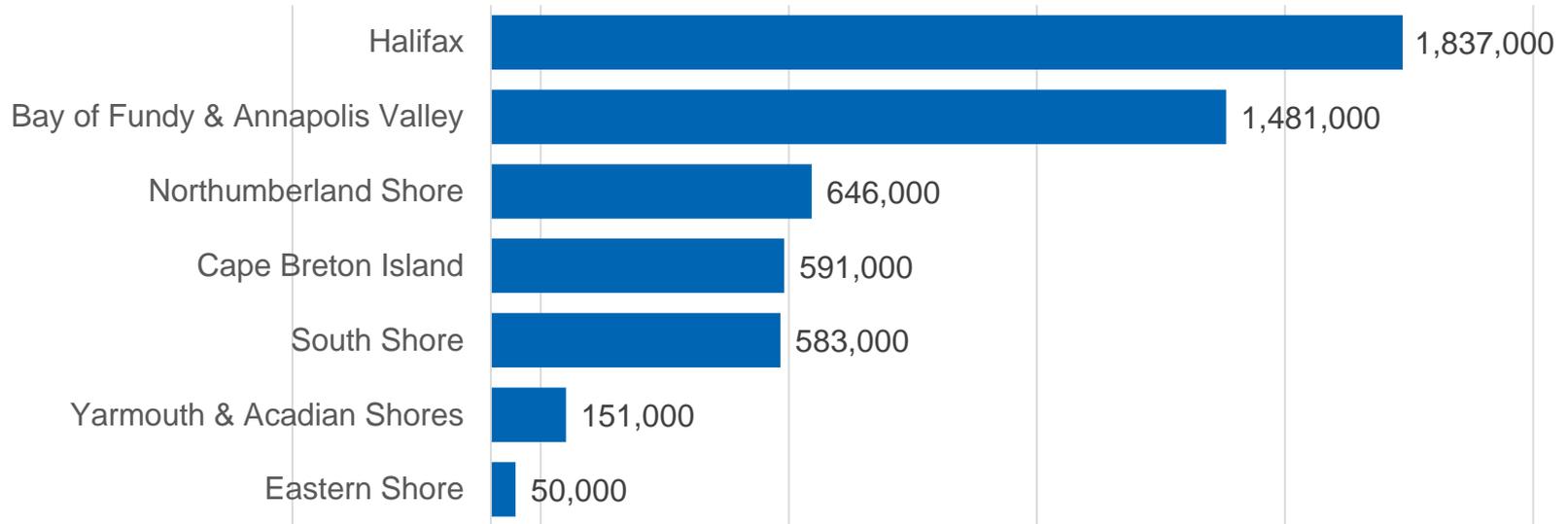


# TIMING OF TRIPS BY NOVA SCOTIANS



Total Trips	
Jan-Mar	1,038,000
Apr-Jun	1,361,000
Jul-Sep	1,671,000
Oct-Dec	1,442,000

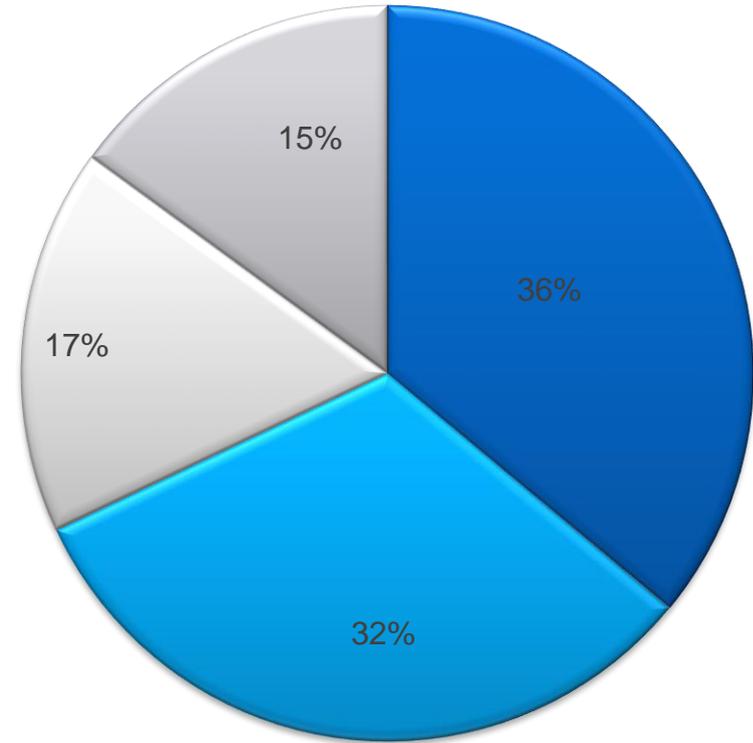
# REGIONS VISITED



# TRAVELLERS FROM NEW BRUNSWICK & PRINCE EDWARD ISLAND

# TRAVELLERS FROM NB/PE

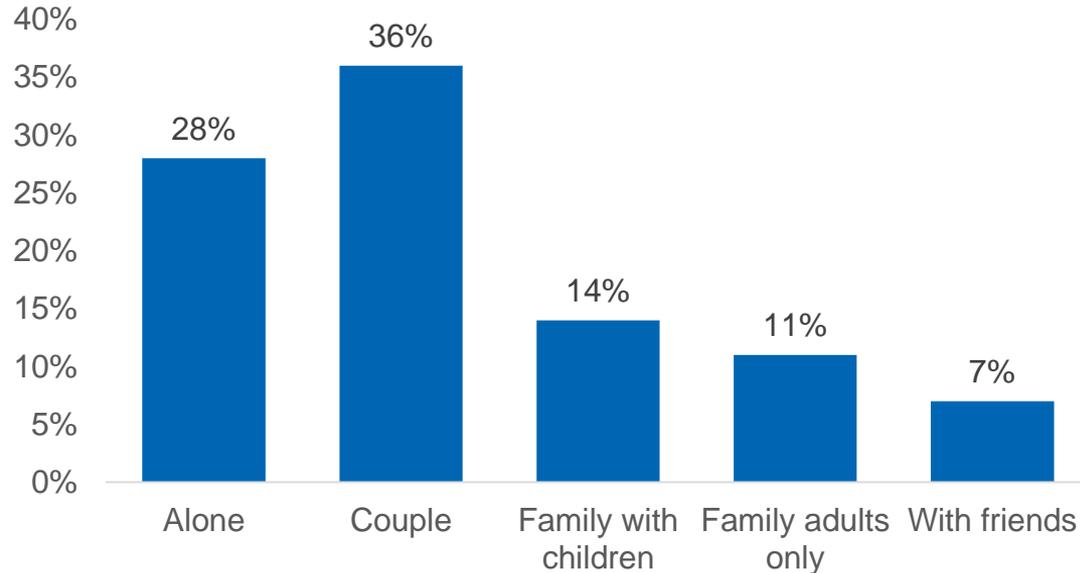
- 1.1 million overnight visitors to Nova Scotia in 2019



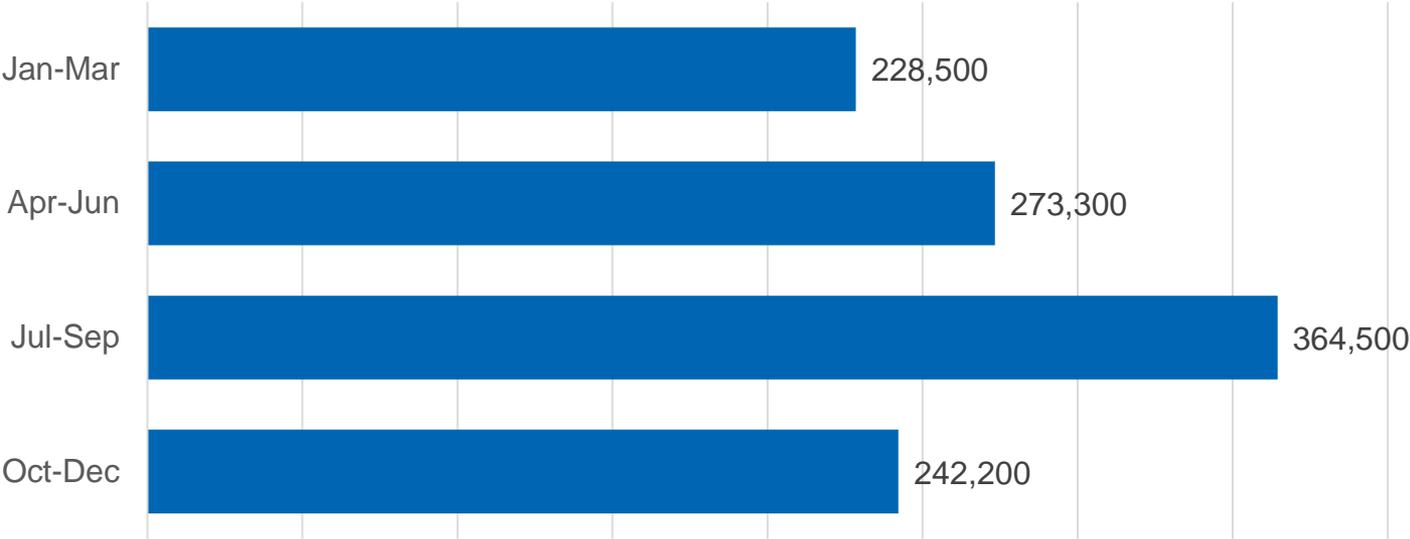
■ One night ■ Two nights ■ Three nights ■ Four+ nights

# TRAVEL PARTIES FROM NB/PE

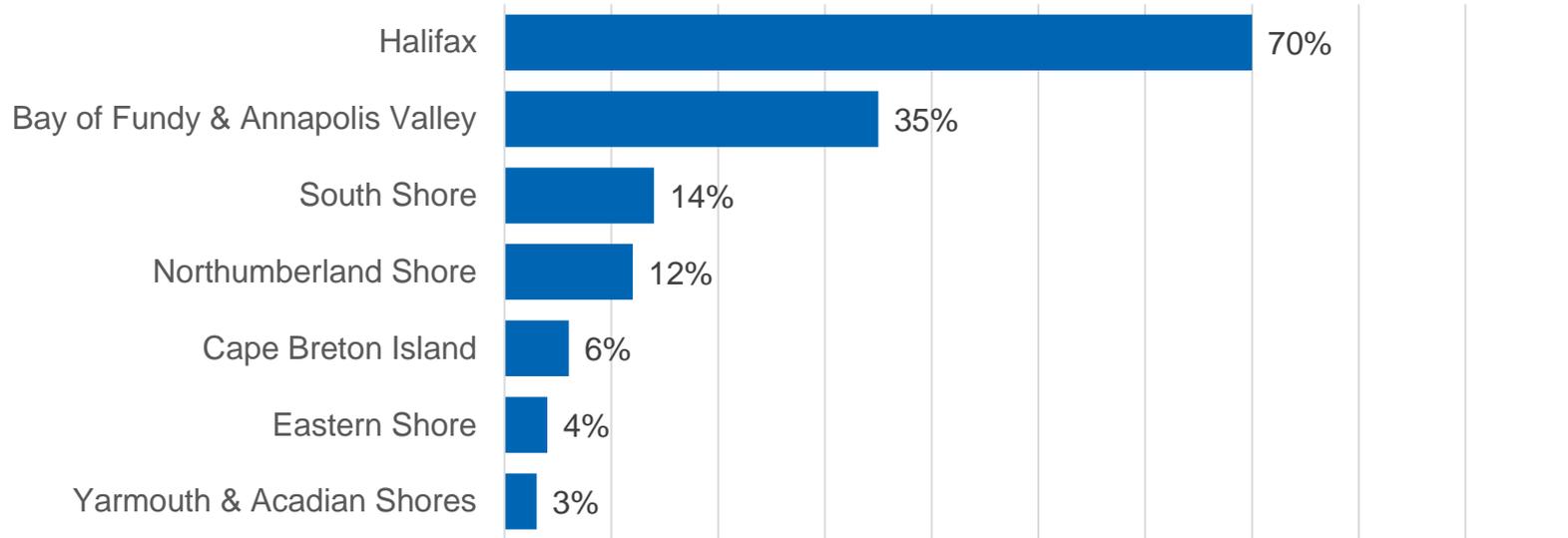
- Most visits are as a couple or alone



# TIMING OF VISITS FROM NB/PE



# REGIONS VISITED BY NB/PE VISITORS



# THE MARITIME TRAVELLER LANDSCAPE

# MARITIME TRAVELLER RESEARCH

- Focus groups with travellers from NS, NB, PE
- Understand impact of COVID-19
- Travel plans for 2020
- Perceptions of NS



# INCREASED DIGITAL ADOPTION

- COVID-19 restrictions drove consumers online
- Increased comfort searching, booking, purchasing online
- Online content is critical
  - Not just what you offer, safety information too

OPPORTUNITY: OPTIMIZE YOUR ONLINE PRESENCE

# COVID-19 IMPACT ON TRAVEL

- More planning, even for Maritime travel
- Concern about cancellation
- Crowd avoidance
- Halifax a concern for some
- Will travel once they feel safe to travel

**OPPORTUNITY: PROVIDE INFORMATION/  
POLICIES TO MITIGATE TRAVEL CONCERNS**

# NOVA SCOTIA HAS A STRONG REPUTATION

- Stunning coastal landscape is foundational
- Key strengths
  - Halifax is a large urban centre
  - Scenic driving
  - Lots to see and do
  - Better festivals/events
  - Can explore without having to drive too far

# NOVA SCOTIA DELIVERS ON MARITIME TRAVEL MOTIVATORS

Road Tripping

Exploring Small Towns/Villages

Shopping

Historic Sites

Festivals, Concerts, Events

Seafood

Museums

Amusement Parks

Visiting Friends, Family

Fall Colours

Cottages, Cabins, Camping

Sports Competitions

Beaches

Restaurants, Pubs

Experiencing the Great Outdoors

OPPORTUNITY: PROMOTE YOUR STRENGTHS

# NOVA SCOTIA IS REASSURINGLY FAMILIAR

- Nova Scotia is comfortable
- Regional travellers tend to return to their regular places
- Friends/family often informs where they go

OPPORTUNITY: ENCOURAGE EXPLORATION  
BEYOND THE FAMILIAR

# SAFETY IS “TABLE STAKES”

- Travellers do not know the safety rules
- Need to know they will be kept safe
- Information at all steps

OPPORTUNITY: CLEARLY DEMONSTRATE  
SAFETY PROTOCOLS ARE IN PLACE

# FAMILY TRAVEL AN IMPORTANT CONSIDERATION

- New Brunswick and PEI seen as stronger than Nova Scotia
- Safety even more important for families

OPPORTUNITY: FAMILY-FRIENDLY ACTIVITIES AND ATTRACTIONS

# COST: “KEEP IT REAL”

- Regional travel seen as less expensive
  - Lower travel cost – don’t need to fly
- Some rejection of overly expensive, luxury experiences
- Important to demonstrate value

OPPORTUNITY TO DEMONSTRATE VALUE

# WIDE RANGE OF HIGH APPEAL ACTIVITIES

## Highest Appeal/Consideration

- Food & restaurants
- Beaches
- Cabot Trail
- Halifax waterfront
- Historic sites
- Boating
- Fall touring
- Whale watching



# WIDE RANGE OF HIGH APPEAL ACTIVITIES

## High Appeal/Consideration

- Hiking
- Festivals
- Glamping
- Resorts
- Lobster
- Local food producers
- Museums
- UNESCO sites
- Kayaking
- Peggy's Cove
- Wineries
- Shopping
- Live music
- Tidal bore rafting
- Craft beer

**OPPORTUNITY: LINK TO/LEVERAGE HIGH APPEAL ACTIVITIES**

# RESIDENT SENTIMENT SURVEY

# RESIDENT SENTIMENT SURVEY

- Weekly survey across Canada
- 1,800 respondents
- Weighted to be reflective of Canadian population
- Minimum of 200 responses from each region of Canada each week (BC, AB, MN/SK, ON, QC, ATL)



# RESIDENT SENTIMENT SURVEY

- Respondents rate their level of agreement
- I would welcome visitors travelling to my community from:
  - Other communities near me
  - Other parts of my province
  - Other parts of Canada
  - The United States
  - Other countries outside of the United States
- Also asked about comfort with one's community being advertised as a travel destination

# RESIDENT SENTIMENT SURVEY

% Somewhat / Strongly Agree  
% Tout à fait d'accord / Plutôt d'accord

	BC/C.-B. (n=209)	AB/Alb. (n=218)	SK/MB Sask./Man. (n=208)	ON/Ont. (n=603)	QC/Qc (n=412)	ATL (n=204)
From other communities near me / ... des visiteurs de collectivités voisines	59%	66%	64%	44%	62%	65%
From other parts of my province / ... des visiteurs d'autres parties de ma province	53%	58%	57%	38%	59%	60%
From other parts of Canada / ... des visiteurs d'autres régions du Canada	31%	45%	29%	32%	51%	25%
From the United States / ... des visiteurs des États-Unis	9%	18%	11%	10%	16%	9%
From other countries / ... des visiteurs d'autres pays que les États-Unis	8%	16%	12%	10%	19%	6%

- Canadians most willing to welcome visitors from within their own province
- Less likely to be willing to welcome visitors from outside their province
- Feeling safe to travel and being willing to welcome are related

# RESIDENT SENTIMENT SURVEY

% Somewhat / Strongly Agree % Tout à fait d'accord / Plutôt d'accord	Rural (n=96)*	Urban (n=107)
From other communities near me / ... des visiteurs de collectivités voisines	65%	64%
From other parts of my province / ... des visiteurs d'autres parties de ma province	57%	61%
From other parts of Canada / ... des visiteurs d'autres régions du Canada	26%	25%
From the United States / ... des visiteurs des États-Unis	9%	9%
From other countries / ... des visiteurs d'autres pays que les États-Unis	4%	8%

- Opinions are similar regardless of where one lives
- Earlier on, rural residents of Atlantic Canada were more welcoming than urban residents

# RESIDENT SENTIMENT SURVEY

	BC/C.-B. (n=209)	AB/Alb. (n=218)	SK/MB Sask./Man. (n=208)	ON/Ont. (n=603)	QC/Qc (n=412)	ATL (n=204)
<b>Net level of happiness / Niveau net de satisfaction<sup>1</sup></b>	<b>+2</b>	<b>+18</b>	<b>+4</b>	<b>-4</b>	<b>+27</b>	<b>+7</b>
Very happy / Happy Très content(e) / Content(e)	31%	39%	32%	31%	47%	36%
Very happy / Très content(e)	14%	16%	13%	8%	18%	14%
Happy / Content(e)	17%	23%	19%	22%	29%	22%
Neutral / Neutre	41%	40%	40%	35%	34%	35%
Unhappy / Mécontent(e)	20%	13%	20%	21%	15%	19%
Very unhappy / Très mécontent(e)	9%	7%	8%	14%	4%	10%
Very unhappy / Unhappy Très mécontent(e) / Mécontent(e)	29%	21%	28%	35%	20%	29%

- Canadians in general are happy to neutral about their community being advertised as a vacation destination

# Heather Yule, Manager of Experience Development, Tourism Nova Scotia

- With over 15 years of marketing, communications and tourism development experience, Heather nurtures strategic opportunities to grow Nova Scotia's tourism economy.
- Heather works with existing and emerging product areas and diverse stakeholders across the province to influence the development of experiences.
- Currently leading the Experience Development team, Heather has been with Tourism Nova Scotia since 2007.
- Previously she worked in marketing and communications with the Nova Scotia Museum and holds a Public Relations Degree from Mount Saint Vincent University.

# DIFFERENTIATE IN THE MARITIME MARKET

# INSPIRE TRAVEL

Differentiate to encourage increased spending, overnight stays, and generate repeat visits. Consider:

- Itineraries
- Packages
- Experiences

Leverage the above tools on your website, local destination marketing websites and NovaScotia.com



# ITINERARIES & STORIES

List of suggested things to do for travellers:

- Organized by time  
(48 hours in Mahone Bay)
- Listicle  
(Inverness: Top 10 Family Fun)
- Inspirational  
(Nova Scotia Bucket List)



# PACKAGES

Combine a minimum of two tourism offerings at one price point, such as tidal bore rafting tour and a meal.

Packages are about providing value and convenience to travellers.

Focus packages on preferred activities of your target market, and ensure elements of package align with your level of quality and visitor values.



# EXPERIENCES

**Experiences are unique, hands-on activities where a visitor learns something by doing something with someone who lives here.**

- Authentically connect visitors to Nova Scotia places and people, such as chefs, fishers, farmers, artisans, guides, musicians, and storytellers to differentiate.
- Offer added-value to activities that visitors will pay a premium for, increasing tourism revenues.
- Create and curate mix of activities and services for a single price.



# ELEVATE PRODUCT TO AN EXPERIENCE







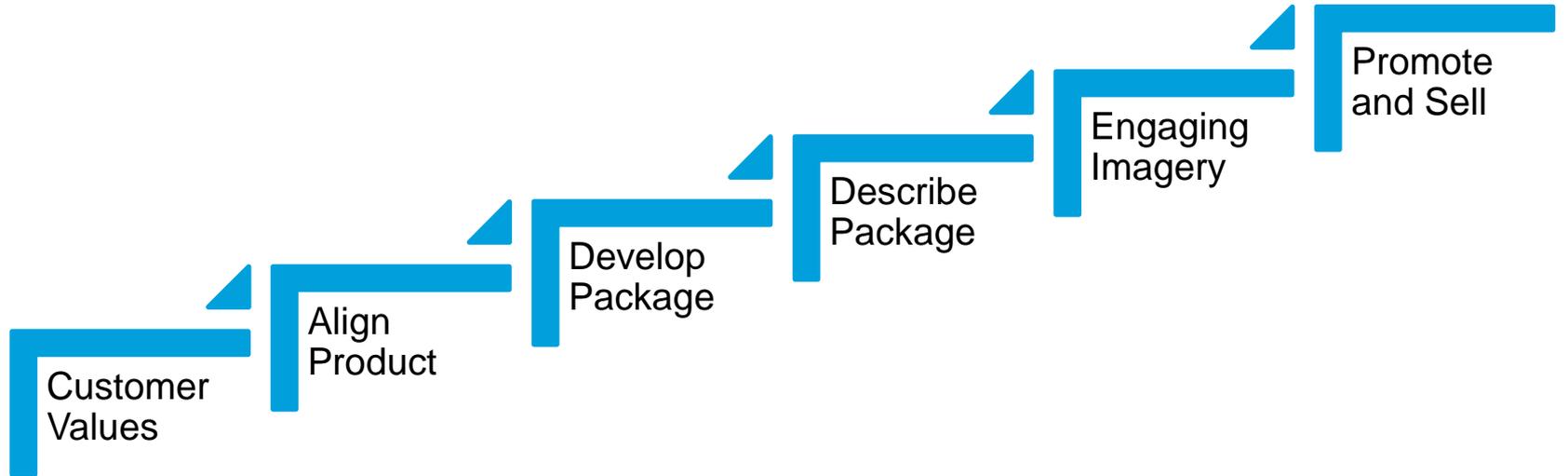


# TOP TEN TIPS

POSITION YOUR BUSINESS WITH  
COMPELLING REASONS  
TO VISIT NOW

# 1. FOCUS ON CUSTOMERS

# CREATE A CUSTOMER FOCUSED PACKAGE



## 2. LEAD WITH COMPELLING OFFER

# REDISCOVER: COMBINE FAMILIAR AND NEW



# 3. DIFFERENTIATE

# OFFER WHAT VISITORS CAN ONLY GET IN NS



# 4. AUTHENTICITY

# DINO DIG: FUNDY GEOLOGICAL MUSEUM



# 5. DEMONSTRATE SAFETY

# GRAPE ESCAPES WINE TOURS



# 6. WORTH THE ROAD TRIP



TOURISM  
NOVA SCOTIA 







# 7. PRICING

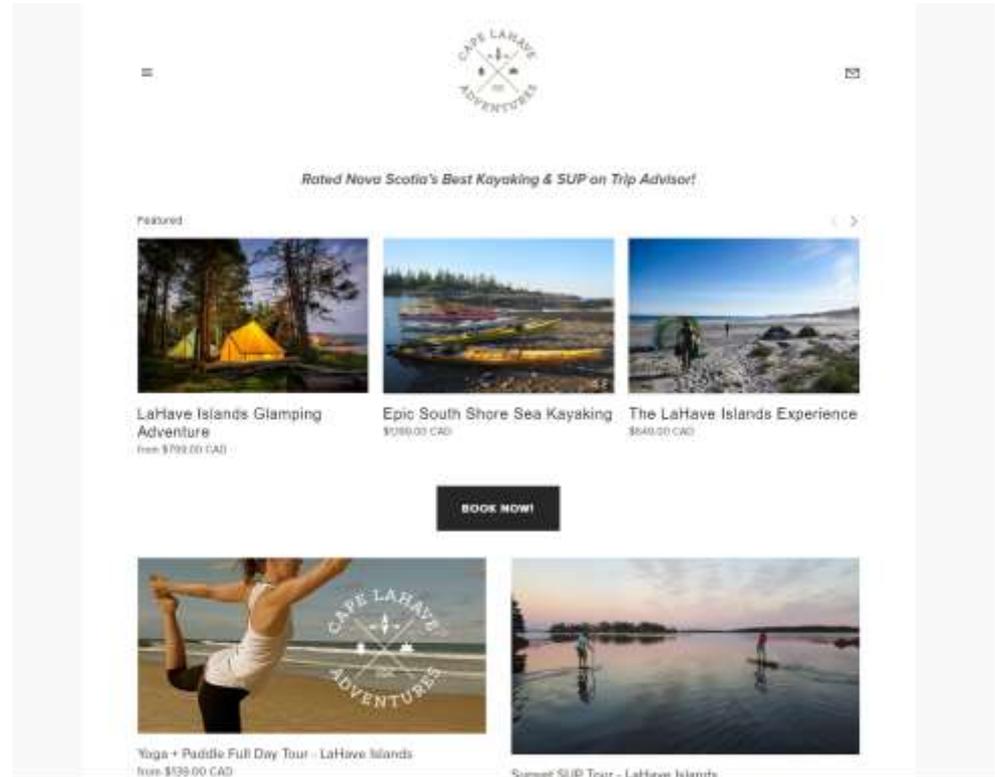
# PRIVATE ISLAND YURT FOR TWO



# 8. EASY TO BUY

# WEBSITE

- Easy to use, clear navigation
- Online booking
- Use your best photography and video
- Provide all relevant information
- Search Engine Optimization (SEO)
- Mobile first
- Update often



# 9. FLEXIBLE CANCELLATION

# NOVASHORES ADVENTURES





# MAKE YOUR SEA KAYAKING DREAMS — COME TRUE —

*In the Beautiful Bay of Fundy, Nova Scotia*

**COVID-19 UPDATE**



# 10. READY TO MARKET

COVID-19 (Coronavirus) Update: Get the latest information about COVID-19 and resources for travellers.

# Over 13,300 km of coastline. Perfect for social distancing.

Many businesses, parks and outdoor activities  
are open for Nova Scotians to safely rediscover.

Learn More >



# ENGAGE WITH VISITORS



# WORD OF MOUTH AND SOCIAL MEDIA

- Most influential and trusted form of marketing
- Turn your neighbours and visitors into your best advocates
- Engage with visitors before, during, and after
- Use hashtag #VisitNovaScotia





# NOVA SCOTIA EXPERIENCE TOOLKIT

# TOURISMNS.CA/EXPERIENCETOOLKIT

Add your packaged experience ingredients:

- your business goals and differentiators
- types of travellers and motivators
- experience development planning tools
- industry best practices
- marketing and sales insights



# EXPERIENCE VIDEOS AND TIP SHEETS

## TIP SHEET #5 AUTHENTIC EXPERIENCES

Authentic Experiences target for learning and personal development. They are for lost, independent, and understated travelers. They actively seek to enrich a private, cultural experience, enjoy "being in the local," and will become deeply immersed in a destination - even learning the local language. Authentic Experiences are their own thing at a destination and prefer to travel off the beaten path.

- Authentic Experiences WANT:**
- Authentic: Cultural experiences
  - To "live like the locals"
  - To discover/immerse themselves in the destination
  - To travel off the beaten path, at their own pace
  - To learn more about themselves and the world



## TIP SHEET #8: CREATING AN EXPERIENCE

Travelers today have more choices than ever before. We're motivating travelers to choose Nova Scotia over competing destinations around the world by offering experiences they can only get here - connecting to our culture, food, people, and coast.

As we discussed earlier in this Toolkit, a purchasable experience is creating or curating a unique mix of activities and services including opportunities for visitors to do something special with a local guide or expert, all packaged at one price point. Experiences go beyond simply including multiple elements, but are well-thought, hands-on activities that engage as many of the five senses as possible and visitors learn something by doing something with someone who lives here.



## TIP SHEET #2: NEW EXPERIENCES NEEDED TO GROW TOURISM

Travelers are looking for authentic, unique, and coastal experiences in Nova Scotia. And delivering authentic, Nova Scotia experiences is good for business.

Tourism is Nova Scotia's leading export industry. As a destination, our goal is to reach \$4 billion in tourism revenue by 2024. Your business and the type of visitor experiences you offer are critical to reaching those goals. As we work together to attract our targeted visitors, you'll be positioned as part of the tourism industry to develop and deliver world-class experiences to visitors.



## TIP SHEET #4: IDENTIFY YOUR BEST VISITORS

Identify to your best potential visitors, the ones who seek what you're selling, makes good business sense! In this section of the Experience Toolkit, we'll introduce valuable insights on travelers that look beyond traditional demographics. Insights will connect you to the values and motivators of travelers to help you make informed decisions when creating and marketing experiences.

As you learn more about traveler types, think about what kind of visitors your business currently attracts and who is a natural fit for what you offer. By focusing on your best visitor, you'll gain insight on ways to enhance the appeal of existing offerings and serve-up new experiences to appeal more strongly to other traveler types. Ready to learn more?



<b>Experience</b> <ul style="list-style-type: none"> <li>• What is your experience?</li> <li>• What are the main activities?</li> <li>• What makes this a unique experience?</li> </ul>	<b>Business Goals</b> <ul style="list-style-type: none"> <li>• What results do you want from your experience?</li> <li>• Do you have other segments of potential visitors. Higher price per guest?</li> </ul>	<b>Unique Selling Proposition</b> <ul style="list-style-type: none"> <li>• How differentiates your experience?</li> <li>• What aspects will set you above the competition?</li> <li>• Your visitor benefit</li> </ul>	<b>Five Senses</b> (Sight, Sound, Taste, Touch, Feel) <ul style="list-style-type: none"> <li>• Which senses will be engaging through your experience?</li> </ul>	<b>Outstanding Questions</b> <ul style="list-style-type: none"> <li>• Local use permission</li> <li>• Insurance</li> <li>• Weather</li> </ul>
	<b>EQ Segment or Best Customer</b> <ul style="list-style-type: none"> <li>• Who is your target EQ segment?</li> <li>• What activities are your best customer is most?</li> </ul>		<b>Partners</b> <ul style="list-style-type: none"> <li>• Who (organization/business) will help deliver the experience and make it sustainable by design?</li> <li>• Is Transportation, local services, food?</li> </ul>	
<b>Cost: Fixed &amp; Variable</b> <ul style="list-style-type: none"> <li>• What is the most significant cost of delivering your experience?</li> </ul>	<b>Path to Purchase</b> <ul style="list-style-type: none"> <li>• How will visitors find out about your experience?</li> <li>• How will visitors book/buy/subscribe your experience?</li> </ul>		<b>Revenue / Price</b> <ul style="list-style-type: none"> <li>• What will you charge?</li> </ul>	

**MENTATION?**

Clustering analysis technique that groups customers based on common criteria such as age, interests, social values, beliefs, and travel behaviours. Market segmentation helps organizations identify and understand travelers most likely to seek their product or service. The segment that is the best fit for your new experience offering, they become your target market.

Visitor profiles based on age, sex, income level, employment, geography, home location.

Visitor profiles based on age, sex, income level, employment, geography, home location, interests, social values, beliefs, and travel behaviours.



A packaged experience doesn't need to be complex, but it does need to be well planned, priced for profit and promoted!

# CONNECT WITH CUSTOMERS

## Update Your NovaScotia.com Business Listing

- The COVID-19 situation may have altered some aspects of your operations
- Update your business listing, packages, events and experiences on NovaScotia.com to reflect your open/close dates, business hours, rates
- Updates can be emailed to:  
[novascotia@novascotia.ca](mailto:novascotia@novascotia.ca)

<https://www.tourismns.ca/news/intouch-blog/we-want-help-you-connect-customers-update-your-novascotiacom-business-listing>

# New Tourism Digital Assistance Program – Apply Now!

- Enhance your online presence and connect with potential customers.
- Tourism Nova Scotia in partnership with Digital Nova Scotia
- Digital Nova Scotia will pair selected businesses with consultants for services up to \$5,000 in value.
- Apply by: Wednesday, July 8, 4 pm



<https://tourismns.ca/tourismdigitalassistanceprogram>

# STAY CONNECTED!

- **Contact Business Development**  
[TNSBusiness@novascotia.ca](mailto:TNSBusiness@novascotia.ca)
- **Newsletter**  
Sign-up for *inTouch*
- **Twitter**  
Follow @TourismNS
- **LinkedIn**  
Follow Tourism Nova Scotia
- **Website**  
Visit [tourismns.ca](http://tourismns.ca)
- **COVID-19 Resources**  
[tourismns.ca/coronavirus](http://tourismns.ca/coronavirus)



Monday, June 22, 2020

Welcome to the *inTouch* blog!

New *inTouch* feature stories are now available on the Tourism Nova Scotia corporate website, along with the latest research, marketing activities, and industry tools and resources.



**Apply Now! New Program Helps Tourism Businesses Improve Their Online Marketing**

The Tourism Digital Assistance Program provides access to experts who can help you develop or enhance your online presence. Apply by July 8, 2020.

[Read More](#)



**Join Tourism Nova Scotia for the 2020 Marketing Campaign Launch**

Get a first look at Tourism Nova Scotia's marketing campaign for 2020.

[Read More](#)



**Webinar: Use New Tourism Nova Scotia Research to Tailor Your Experiences to Appeal to Regional Visitors**

Learn about research results from Tourism Nova Scotia and how this can inform your product and experience offerings for regional visitors. Join the webinar at no cost on June 23.

[Read More](#)



**#TNSHeretoHelp - Heather Yule**

Heather Yule, Experience Development Manager, is here to help your business use market research and insights to create compelling tourism experiences.

[Read More](#)



**#TNSHeretoHelp - Hannah Crawford**

Hannah Crawford, Market Development Coordinator, is here to help coordinate familiarization tours and press trips to showcase Nova Scotia.

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