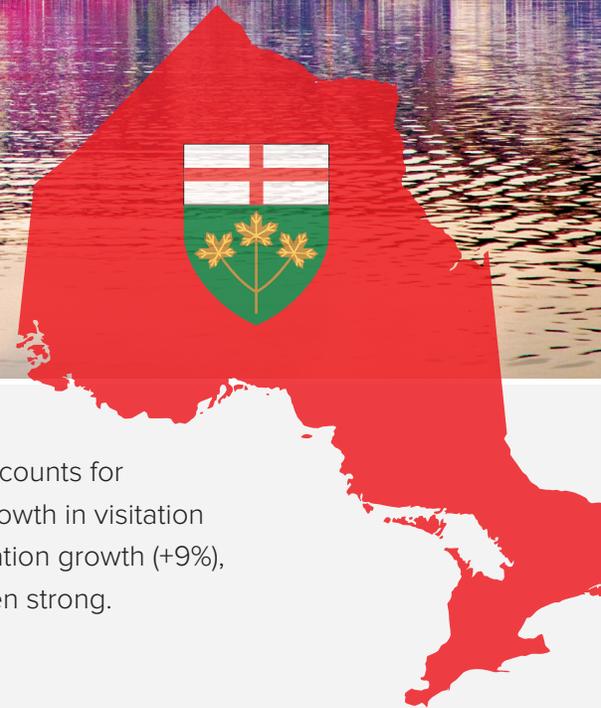


MARKET HIGHLIGHTS

ONTARIO



Ontario is Nova Scotia's largest market outside of Atlantic Canada and accounts for one-quarter of Nova Scotia's non-resident overnight visitor population. Growth in visitation from Ontario in 2017 (+16%) exceeded overall non-resident overnight visitation growth (+9%), and average annual growth from Ontario over the past four years has been strong. Visitation from Ontario moderated in 2018.

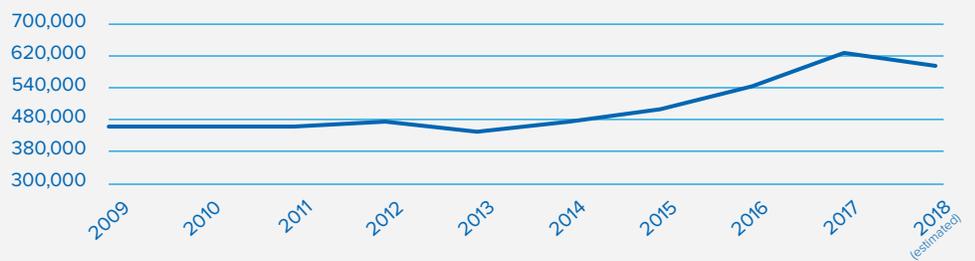


AVERAGE PLEASURE PARTY SPEND

\$2,100

VISITATION

Non-Resident Overnight Visitation

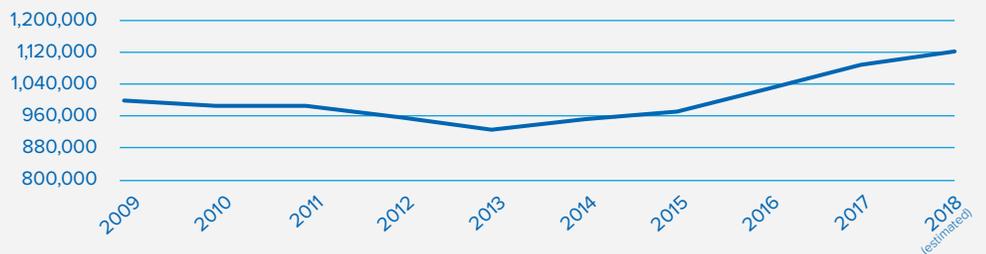


AVERAGE LENGTH OF STAY PLEASURE VISITORS

6.1 nights

AIR CAPACITY

Annual Inbound Seat Capacity

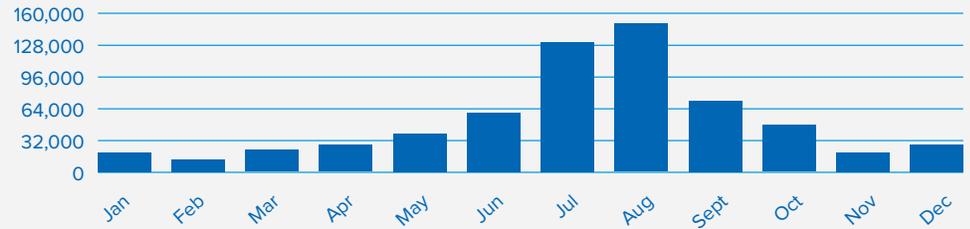




TRAVEL SEASON

Most visitation to Nova Scotia occurs between June and October.

Visitation by month, 2017



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



Experience local food and drink



Visit historic and cultural sites



Explore beautiful seacoasts



Take part in activities that allow them to experience the great outdoors



Experience a destination beyond the major attractions





ONTARIO SWOT ANALYSIS

STRENGTHS

- Largest target market
- Close proximity and easy access by air and road
- Strong product match
- Highest awareness of what Nova Scotia offers as a vacation destination
- Digital Content Marketing Program helps extend reach
- NS advertising is compelling and effective

WEAKNESSES

- Difficult to break through the advertising clutter in such a highly-competitive market
- Visitation is seasonal – primarily occurs June-October
- Air travel within Canada can be expensive

OPPORTUNITIES

- Growth of visitation via air
- Significant opportunity to convert awareness to visitation
- Gain greater reach in market with increased investment
- Target Free Spirits segment with increased investment
- Offer more compelling experiences to encourage visitation

THREATS

- Gas price volatility
- A decreased focus on this market would be especially detrimental, as Ontario is Nova Scotia's largest target market
- Stronger Canadian dollar could increase attractiveness of cross-border travel

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:** Direct-to-consumer advertising is the leading strategy in Ontario. The 2018 campaign included TV, digital video, display, search engine marketing (SEM), and social media.
- **Marketing Partnerships:** Tourism Nova Scotia invests with partners through the Digital Content Marketing Program to extend the reach of Nova Scotia's message in Ontario.

OPPORTUNITIES FOR INDUSTRY

For more information, please contact **Jennifer McKeane** at tourismdevelopment@novascotia.ca or (902) 424-6540
TourismNS.ca

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.
- **E-newsletter:** Opportunity for industry coverage in e-newsletter distributed to about 50,000 potential visitors.
- **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.
- **Ontario Motor Coach Association (OMCA) Conference & Marketplace:** This is an opportunity to meet with North American tour operators (primarily from Ontario) in one-on-one prescheduled appointments.
- **Travel Media Association of Canada Marketplace (TMAC):** TMAC's 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.

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.