

# MARKET HIGHLIGHTS ONTARIO



**Ontario** is Nova Scotia's largest source of visitors outside of Atlantic Canada, and accounts for one quarter of total annual visitors. Following four years of strong growth between 2013 and 2017 (+45%), and a particularly strong 2017 (+16%), visitation from Ontario moderated in 2018 and 2019.

## ONTARIO KEY FACTS



**600,800** VISITORS from Ontario in 2018



**49%**

Drive to Nova Scotia  
🕒 1-3 DAYS



**25%**

of Nova Scotia VISITORS



**39%**

VISITATION GROWTH 2013-2018



**51%**

Fly to Nova Scotia  
🕒 2 HOURS non-stop

Airports with service to Nova Scotia:  
**TORONTO PEARSON**  
**TORONTO CITY CENTRE**  
**OTTAWA**  
**LONDON**  
**HAMILTON**

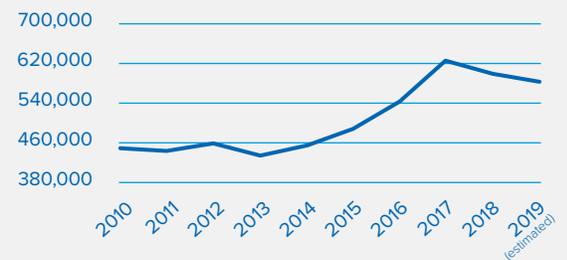


**1,143,900**

AVAILABLE SEATS on non-stop flights to Nova Scotia (2019)

## VISITATION

Non-Resident Overnight Visitation



## NON-STOP AIR CAPACITY

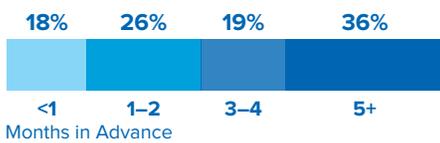
Annual Inbound Seat Capacity to Nova Scotia



# CHARACTERISTICS OF ONTARIO PLEASURE VISITORS

Tourism Nova Scotia works to attract people travelling for pleasure. These visitors are more likely to stay in paid accommodations and spend more during their trip than those visiting friends and relatives. 53% of visitors from Ontario are pleasure visitors.

## WHEN THEY DECIDE TO VISIT NOVA SCOTIA



## HOW THEY BOOK

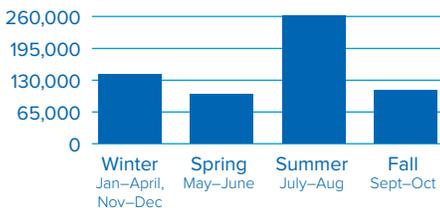


**76%**  
made an  
online booking

## WHEN THEY VISIT

Most visitors (71%) come to Nova Scotia between June and October.

Visitation by Season (2018)

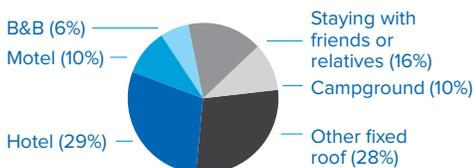


## AVERAGE LENGTH OF STAY



**6.1**  
nights

## WHERE THEY STAY



## AVERAGE SPEND PER TRIP



**\$2,100**  
per party

## 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



Eat lobster



Go hiking



Explore beaches



Enjoy coastal sightseeing



Visit museums/historic sites



Visit wineries, breweries, and distilleries



Visit Halifax Waterfront



Visit Peggy's Cove



Visit UNESCO sites

# ONTARIO SWOT ANALYSIS

## STRENGTHS

- Largest target market—one quarter of Nova Scotia's visitors come from Ontario
- Easy access by air and road
- Five airports in Ontario have frequent, short flights to Nova Scotia
- High awareness of what Nova Scotia offers as a vacation destination
- Nova Scotia offers many things that appeal to Ontario travellers
- Digital marketing tactics developed with industry partners through the Digital Content Marketing Program have increased marketing of Nova Scotia in this market
- Nova Scotia advertising considered compelling and effective
- More Ontario travellers actively considering visiting Nova Scotia than travellers from other markets

## OPPORTUNITIES

- Increase partnerships with private and public sector to expand marketing reach
- Grow air visitation
- Convert awareness to visitation through conversion-driven marketing tactics
- Gain greater reach in market with increased investment
- Expand marketing to target Free Spirits, in addition to Authentic Experiencers and Cultural Explorers
- Increase the variety of compelling experiences we offer to motivate visitation during peak and off-peak months
- Increase Nova Scotia offerings where travellers are looking for information, such as online booking platforms

## WEAKNESSES

- Highly competitive advertising market; difficult to break through the clutter
- Visitation is primarily seasonal (71% of visitation occurs June—Oct)
- Variety of vacation location choices within short driving and flying distances

## THREATS

- Gas price volatility
- Cost of air travel
- Stronger Canadian dollar could increase attractiveness of travel to the US
- Increased marketing investment by competing travel destinations

## 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.

- **Consumer Advertising:** Consumer advertising is the leading strategy in Ontario. The 2019 campaign included: TV; direct-to-consumer digital activities including video, display, search engine marketing (SEM), and social media; and a TV content partnership with the Food Network (Big Food Bucket List) and influencers Colin & Justin (Breakfast Television Toronto).
- **Marketing Partnerships:** Tourism Nova Scotia invests with partners through the Digital Content Marketing Program to develop digital marketing tactics and content to increase awareness of Nova Scotia in this market.

### Travel Media and Travel Trade

Tourism Nova Scotia's travel media and travel trade activities leverage partnerships to create awareness of Nova Scotia, develop and sell travel packages, and inspire people to visit Nova Scotia.

- **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 with a goal of having them develop Nova Scotia itineraries and travel packages.
- **Travel Media Press Trips:** Journalists and social media influencers visit the province so they can promote Nova Scotia tourism products through national and international media channels.
- **Media and Travel Trade Marketplaces:** Tourism Nova Scotia promotes Nova Scotia through participation in media and travel trade marketplaces that support the Ontario market.

# OPPORTUNITIES FOR INDUSTRY

For more information, please contact [tourismdevelopment@novascotia.ca](mailto:tourismdevelopment@novascotia.ca) or visit [TourismNS.ca](http://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

- **Doers & Dreamers Guide:** Industry can purchase advertising in addition to receiving a free listing.
- **Novascotia.com:** Opportunity to purchase advertising and free business, package, and events listings for those in the Doers & Dreamers Guide.
- **Social Media Channels:** Operators can use the #VisitNovaScotia hashtag to be featured in Nova Scotia tourism posts on Facebook, Instagram, Twitter, and YouTube.
- **Digital Content Marketing Program:** Operators can co-invest with Tourism Nova Scotia to develop digital marketing assets and tactics to extend their marketing reach.
- **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.
- **Travel Media Association of Canada Marketplace:** This 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.
- **Ontario Motor Coach Association Marketplace:** This marketplace is the premier event in Ontario for North American packaged travel, with a primary focus on group travel. Over a period of four days, buyers and sellers will meet face-to-face during a series of pre-scheduled appointments.

## 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.