

MARKET HIGHLIGHTS GERMANY

Germany is Nova Scotia's second largest overseas market, with annual visitation ranging from 8,000 to 15,000. There has been strong growth in visitation to Canada. 406,000 German travellers came to Canada in 2018, a 30% increase from 2013. On average, overseas visitors spend more and stay longer than visitors from Canada or the United States. German travellers are highly dependent on travel agents and tour operators to research and book their trips.



GERMANY KEY FACTS



8,000–15,000 VISITORS
from Germany annually



Airports with service to Nova Scotia:

FRANKFURT

 **7.5 HOURS**

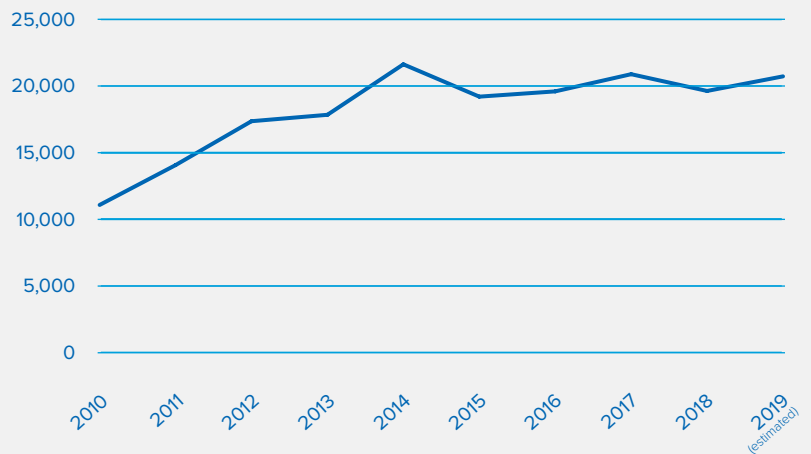


20,700

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

NON-STOP AIR CAPACITY

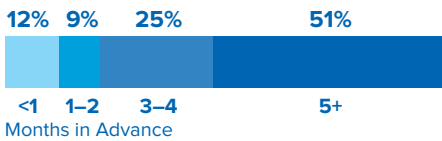
Annual Inbound Seat Capacity to Nova Scotia



CHARACTERISTICS OF GERMANY 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. 64% of visitors from overseas are pleasure visitors.

WHEN THEY DECIDE TO VISIT NOVA SCOTIA*



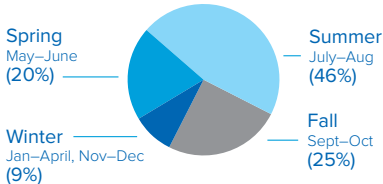
HOW THEY BOOK

64% use a travel agent/
tour operator
90% made at least one
online booking*

WHEN THEY VISIT

Most visitors (84%) come to Nova Scotia between June and October.

Visitation by Season (2018)

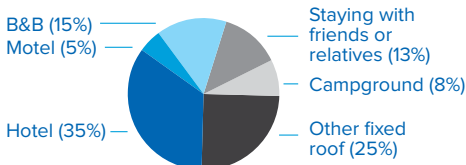


AVERAGE LENGTH OF STAY*



9.5 nights

WHERE THEY STAY*



AVERAGE SPEND PER TRIP*



\$4,400 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



Experience the world's highest tides



Visit Halifax Waterfront



Visit Peggy's Cove



Visit UNESCO sites

*data reflects all overseas visitors

GERMANY SWOT ANALYSIS

STRENGTHS

- Nova Scotia offers many things that appeal to travellers from Germany
- Overseas visitors tend to stay longer and spend more than Canadian or US visitors
- Easy access via non-stop flights June—October (up to 5x weekly from Frankfurt in July/Aug)
- Euro is strong currency relative to Canadian dollar
- Strong visitation growth over past five years
- Tourism Nova Scotia has an established in-market representative
- Diverse partnerships with tour operators in Germany mitigate risk to industry restructuring

WEAKNESSES

- Visitation is primarily seasonal
- Many Nova Scotia operators closed in fall season when visitation from Germany is still strong
- No direct flights outside of peak season
- Suspension of key routes from Reykjavik and London-Heathrow due to Boeing 737 MAX jet grounding
- Limited awareness of Nova Scotia
- Highly competitive advertising market; difficult to break through the clutter
- Direct-to-consumer activities limited due to available marketing budget

OPPORTUNITIES

- Increase awareness and reach through increased marketing investment
- Increase inventory of compelling shoulder season products and experiences
- Take advantage of Destination Canada's goal of increasing travel to less visited parts of Canada
- More operators/industry can become trade ready to be included in travel packages sold through German tour operators
- Adjust marketing timeline to align with earlier Germany booking timeline
- Increase promotion of Nova Scotia offerings where travellers are looking for information, such as online booking platforms

THREATS

- Exchange rate volatility
- Economic slowdown
- German tour operators changing focus, could reduce Nova Scotia itineraries
- Sustainability of Condor Airlines flight from Frankfurt following sudden closure of parent company Thomas Cook
- 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.

- **Direct-to-consumer Advertising:** Tourism Nova Scotia, in partnership with the Halifax International Airport Authority, ran a direct-to-consumer advertising campaign in 2019 focused on driving awareness of Nova Scotia as a travel destination and direct air routes. The campaign consists of digital video, digital display, search engine marketing, and social advertising.
- **Marketing Partnerships:** Tourism Nova Scotia partners with Destination Canada and Tourism International Market Expansion Program (TIME) to increase awareness of Nova Scotia.

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.

- **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 visitors to decide to visit Nova Scotia.
- **Trade Partnerships:** Tourism Nova Scotia partners with Destination Canada and the Atlantic Canadian provinces to develop, market, and increase sales of packaged product sold through Germany-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 Germany.

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

- **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.
- **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.
- **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 Canadian provinces and Destination Canada.

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.