



MARKET HIGHLIGHTS UNITED KINGDOM

The **United Kingdom (UK)** is Nova Scotia's largest overseas market. There has been strong growth over the past decade from the UK, and visitation to Nova Scotia increased by nearly 55% between 2013 and 2018. The grounding of the Boeing 737 MAX jets led to decreased air access; however, visitation from this market has moderated only slightly in 2019. On average, overseas visitors stay longer and spend more than visitors from Canada or the US.

UNITED KINGDOM KEY FACTS

 **31,200** VISITORS from the UK in 2018


1.3%
of Nova Scotia VISITORS


55%
VISITATION GROWTH
2013–2018

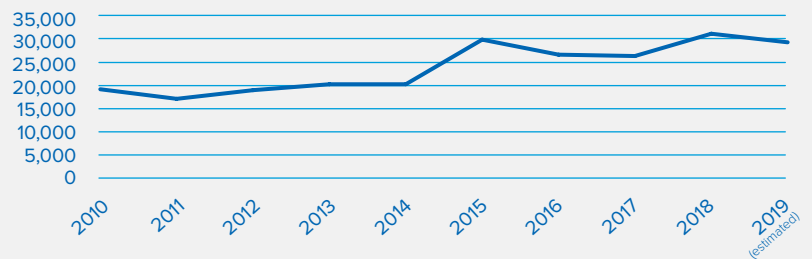
Airports with service to Nova Scotia:
LONDON-HEATHROW
LONDON-GATWICK
GLASGOW
DUBLIN

 **6–7 HOURS**


67,300
AVAILABLE SEATS
on non-stop flights
to Nova Scotia (2019)

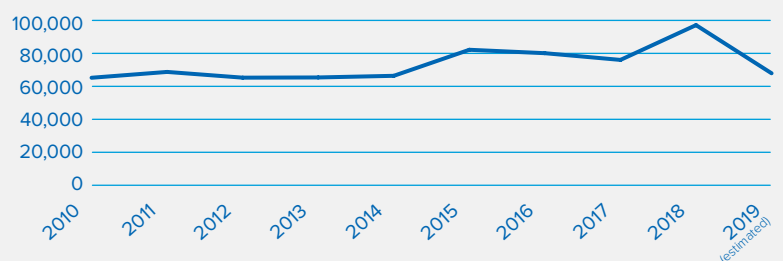
VISITATION

Non-Resident Overnight Visitation



NON-STOP AIR CAPACITY

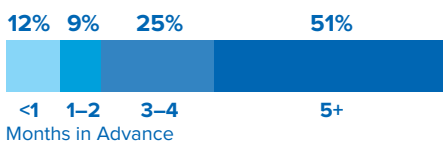
Annual Inbound Seat Capacity to Nova Scotia



CHARACTERISTICS OF UNITED KINGDOM 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*



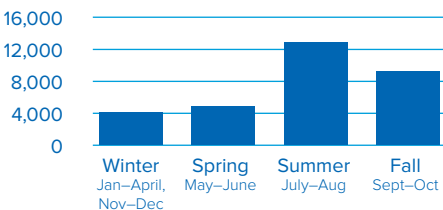
HOW THEY BOOK

62% use a travel agent/
tour operator
90% made at least one
online booking*

WHEN THEY VISIT

Most visitors (80%) come to Nova Scotia between June and October.

Visitation by Season (2018)

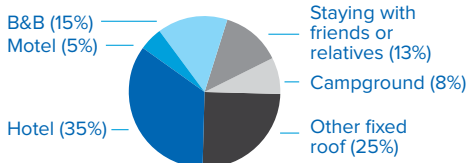


AVERAGE LENGTH OF STAY*



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

UNITED KINGDOM SWOT ANALYSIS

STRENGTHS

- Nova Scotia offers many things that appeal to UK travellers
- Overseas visitors stay longer and spend more than Canadian or US visitors
- Easy access via frequent non-stop flights from Glasgow, London, and Dublin in peak months
- New routes introduced in past five years from London-Gatwick, Glasgow, and Dublin
- Strong currency relative to Canadian dollar
- Established in-market representative
- More likely to visit Nova Scotia in the fall than North Americans; 30% of total visitation is in September and October
- Cultural connections and ties
- Nova Scotia advertising is compelling and effective
- Strong visitation growth of target travellers
- Strong alignment with Destination Canada target travellers

OPPORTUNITIES

- Further growth of visitation via air
- Re-establish and maintain London-Heathrow flight
- Increase inventory of compelling shoulder season products and experiences
- Increase awareness and reach through increased marketing investment
- Adjust marketing timeline to better align with earlier UK booking timeline
- Take advantage of Destination Canada's goal of increasing travel to less visited parts of Canada
- Capture more market share of UK travellers if travel to mainland Europe declines following Brexit
- More operators/industry can become trade ready to be included in packaged tours sold by UK-based tour operators
- Increase promotion of Nova Scotia offerings where travellers are looking for information, such as online booking platforms

WEAKNESSES

- Suspension of air route from London-Heathrow and Icelandair Reykjavik stopover in 2019 due to grounding of Boeing 737 MAX jets
- No non-stop air access from UK in off-peak season (suspended Heathrow flight is only year-round route)
- Direct-to-consumer activities limited due to available marketing budget
- Highly competitive advertising market; difficult to break through the clutter
- Visitation is primarily seasonal (80% of visitation occurs June—Oct)
- Many Nova Scotia operators closed in fall season when visitation from UK is still strong

THREATS

- Sustainability of air routes
- Continued suspension of air route from London Heathrow
- Uncertainty of implications of Brexit
- Exchange rate volatility
- Visitation growth limited by lack of year-round flight
- Cost of air travel
- Impact of sudden closure of mega travel company Thomas Cook

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:** Tourism Nova Scotia, in partnership with the Halifax International Airport Authority and WestJet, ran its largest consumer advertising campaign to-date in 2019 to drive awareness of Nova Scotia and direct air routes. The campaign consisted of an in-market taxi-cab takeover, an augmented reality event, digital video, digital display, search engine marketing, and social advertising.
- **Marketing Partnerships:** Tourism Nova Scotia partners with the Atlantic Canada Agreement on Tourism (ACAT) to increase awareness of Nova Scotia in the UK.

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 move along the sales journey to decide to visit Nova Scotia.
- **Trade Partnerships:** Tourism Nova Scotia partners with ACAT and Destination Canada to develop, market, and increase sales of Nova Scotia travel packages through UK-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 attendance at and participation in media and travel trade marketplaces in the UK.

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.
- **World Travel Market (WTM):** A business-to-business exhibition in London presenting a diverse range of destinations and industry sectors to UK and international travel professionals, including tour operators, meeting planners, and media.

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.