



Economic Information Observatory
a regional cooperation project between
Atlantic Canada and **Saint-Pierre and Miquelon, France**

Tourism and Emerging Trends



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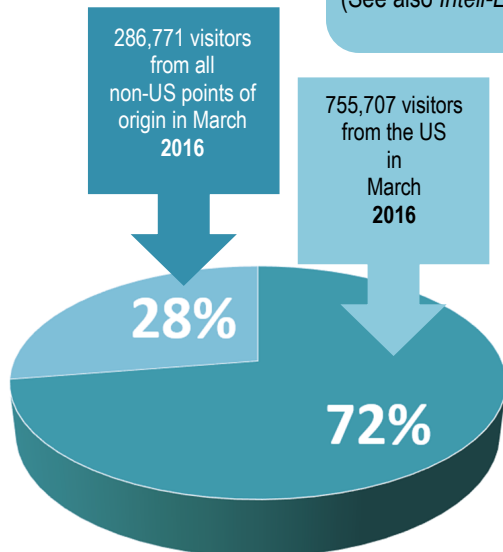
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Tourism and the Latest Trends in Atlantic Canada

The tourism industry continues to grow worldwide: the United Nations World Tourism Organization (UNWTO) is predicting that the total number of international tourists globally will surpass 1.8 billion by 2030, up from just 940 million in 2010. The Canadian tourism industry continues to make every effort to position itself as a preferred destination and gain a significant share of this fast-growing market. While visitors from the United States continue to dominate the national tourism market, Canada, and **Atlantic Canada** in particular, are turning increasingly to **non-traditional niches** with a view to attracting a diverse clientele seeking out authentic tourism experiences that reflect the latest emerging trends.

(See also *Intell-Echo*, vol. 1, no. 4, 2014).

At the national level:



*1,042,478 total tourists in March 2016;
2,710,688 total tourists in Q1 of 2016

When it comes to foreign tourists, more visit Canada from France than any other country with the exception of the United States.

Some 482,000 tourists from France entered Canada in 2014, spending a total of approximately \$708 million during their stays in the country.

The Canadian tourism industry in figures
for the 1st quarter of 2016

(source: *Destination Canada*):

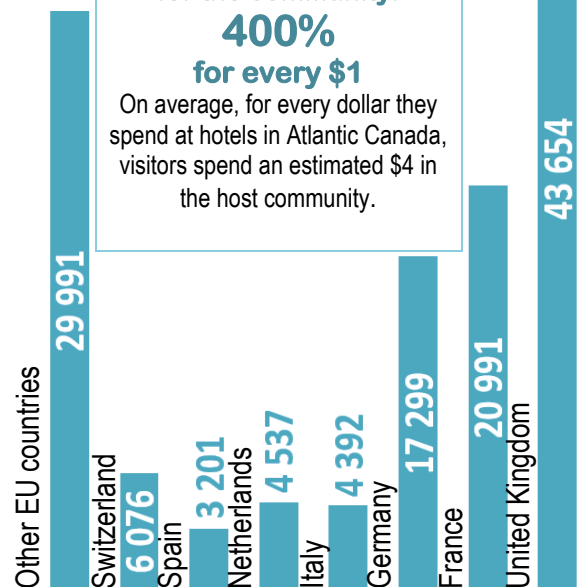
- ▶ Total jobs nationwide: 637,000
- ▶ National GDP: \$6.9 billion
- ▶ Domestic demand: \$14.6 billion
- ▶ Total exports of tourism products and services: \$3.1 billion

The European market is the second-largest for Canada after the US.

Total **European visitors** to Canada in March 2016 broken down by country:

Spin-off benefits for the community:
400%
for every \$1

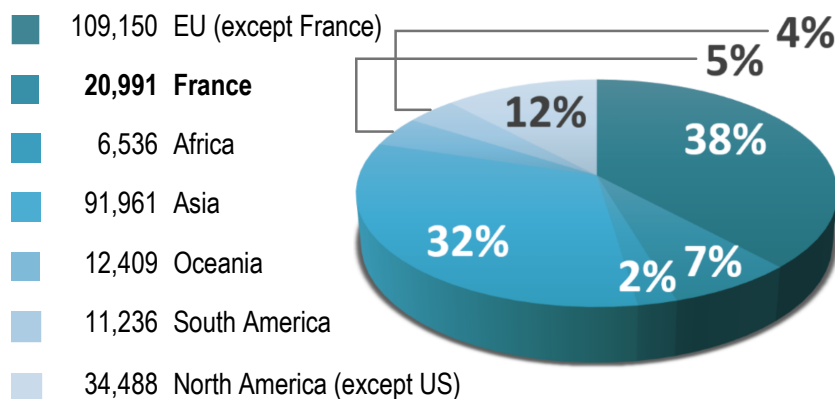
On average, for every dollar they spend at hotels in Atlantic Canada, visitors spend an estimated \$4 in the host community.



Foreign tourists entering Canada (except US)

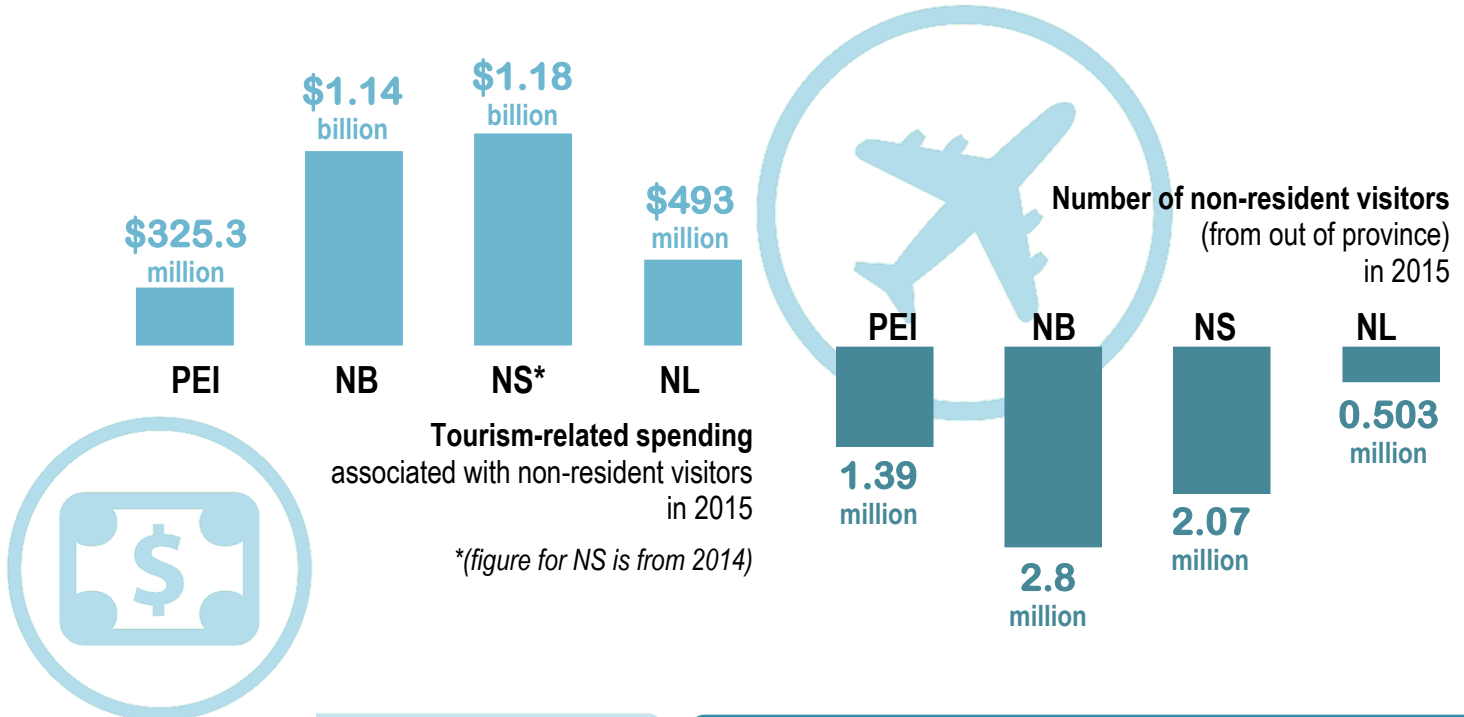
286,771 entries (except US), March 2016

Breakdown of number of tourists



Snapshot: Tourism in Atlantic Canada

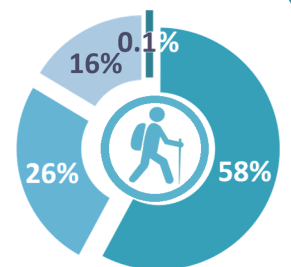
With nearly 10,000 businesses active in the sector, the tourism industry in Atlantic Canada is dynamic, generating annual revenue of approximately \$4.9 billion, or slightly more than 4% of the region's GDP. More than 6.5 million people are estimated to have visited Atlantic Canada in 2015.



To calculate revenue in the tourism industry, analysts multiply the total number of visitors recorded at each province's various entry points, including airports, border crossings and ports, by the estimated total amount spent per tourist as determined by surveys.

Total foreign visitors to Atlantic Canada by province of entry in the 1st quarter of 2016, including US

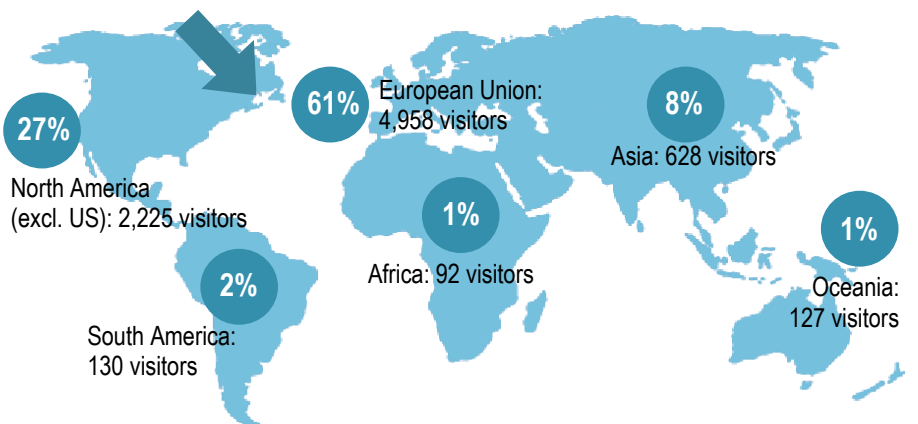
	PEI	NB	NS	NL
Total 2016	20	17,623	7,836	5,000
Total 2015	23	13,944	8,754	5,645



Total foreign visitors to Atlantic Canada by province of entry in the 1st quarter of 2016 (excluding US)

	PEI	NB	NS	NL
Total	4	172	3619	4365
Europe	2	98	2221	2637
Africa	-	4	52	36
Asia	2	46	353	227
Oceania	-	4	104	19
North America	-	18	838	1369
South America	-	2	51	77

Foreign visitors to Atlantic Canada by continent of origin (visitors in 1st quarter of 2016, excluding US)



Emerging Tourism Trends in Atlantic Canada

The latest trends in tourism reveal changes in both the types of tourism products that people seek and the ways in which these products are consumed. The tourism industry in Atlantic Canada is learning to adjust to the transformations arising from these trends and boasts tourism products that stand out from the traditional offerings. In contrast to mass commercial tourism deployed in organized groups, today's ideal vacation profile is characterized by a desire for more personalized experiences. Decreased purchasing power combined with yearning for greater authenticity is pushing vacationers to seek out "unique" immersive, participatory or made-to-measure holiday experiences. Thanks to the creativity of tourism promoters and support from governments and the business community, visitor traffic to all four Atlantic Provinces is expected to grow by 1.3% to 3.1% between now and 2019. (Statistics from Egan, J. Indicateurs et aperçu du tourisme, ACOA-RJCC, 2016).



Integrated tourism offering

According to Tourism Nova Scotia, strategies to incorporate and coordinate a supply of tourism products and activities showcasing the "great outdoors" in Cape Breton have driven an increase in the average revenue generated per visitor to that region to \$2,000, compared with \$1,300 per person for tourists visiting other parts of the province.

Examples of innovative tourism initiatives in Atlantic Canada

Nature tourism, green tourism, ecotourism, adventure tourism

- ▶ Garden tourism: all four provinces have a rich and remarkable plant heritage that is showcased in numerous gardens, parks and historic sites throughout Atlantic Canada
- ▶ Sustainable tourism and ecotourism
 - Bird and sea mammal watching in all four provinces
 - PEI New solar-powered water taxi service in the North Rustico area
 - NB Approximately 40 electric vehicle charging stations, including 7 in Moncton
 - NB Winter cycle week on a 16 km trail in Kouchibouguac National Park in March 2016
 - NS Bike tourism: 40,000 bike tourists a year on average in Nova Scotia

Culinary tourism

- PEI 2016 tourism campaign "True Island Flavours" focused on the province's food offerings and seeking to position PEI as a preferred culinary destination on the international map, combining tourism with the province's food strategy
- NL The province's capital, St. John's, is a high-level culinary destination with some of the finest restaurants in the country. One of them, Raymonds, has been ranked one of the world's 50 best restaurants and topped the list of the top 50 restaurants in Canada

Niche tourism

- NB Glamping: "glamorous" camping at luxury facilities at Ridgeback Lodge, Kingston
- NB Goutte d'Ô – Unusual accommodations in Fundy National Park launched in 2016 (Parks Canada project)
- NB Fully appointed houseboats on Mactaquac Lake
- NB Northern Odyssey campaign to promote snowmobile (and other recreational vehicle) tourism
- NS "Cocoon" tents suspended in the trees at Ingonish Beach (Parks Canada project)
- NS Jurassic fossil site along the Bay of Fundy (Fundy Geological Museum in Parrsboro)
- NL Fogo Island: luxury hotel accommodations and contemporary art in a subarctic island setting

Sport tourism

- PEI Summerside: 80 sport tournaments in 2015 (versus 17 in 2009) and 100,000 athletes in the last 5 years; 15,000 visitors and \$8 to \$10 million in revenue associated with this industry subsector
- PEI Charlottetown: Host city of the 2016 annual draft of the Quebec Major Junior Hockey League
- NB FIFA Women's World Cup 2015 in Moncton (\$20M in spin-off benefits for the city)
- NS 2015 World Men's Curling Championship
- NL Royal St. John's Regatta: North America's oldest annual sporting event (since 1816)

Immersive and participatory tourism

- NB Partnership between Village historique acadien, Festival acadien de Caraquet, Oktoberfest des Acadiens and Fils du Roy distillery in Paquetville on immersive activities
- NB Acadian Peninsula offers a series of theme-based itineraries integrating special events into local tourism attractions

E-tourism

- NS High-tech enterprises such as Map Masters Technologies Inc. specialize in development of mobile apps for the tourism industry

Discount tourism

Accommodations with host families; local resort and other tourism offerings: promoting local tourism with a splash of humour, "staycation" offerings take advantage of the proliferation of mobile apps to help find new ways to showcase local attractions

In the Tourism Spotlight

2017 — Celebration of Canada's 150th birthday



July 1, 2017, marks the 150th anniversary of Canadian Confederation, the country being founded in 1867 when the British North America Act came into effect. At that time, Canada was made up of four provinces: New Brunswick, Nova Scotia, Ontario and

To mark the 150th anniversary of Canadian Confederation, the Government of Canada has developed an initiative called **Canada 150**, in which it has invested \$360 million. Under the direction of the Department of Canadian Heritage, Canada 150 brings together a large number of federal departments and agencies in implementing a diverse range of projects to celebrate this historic milestone. More than 6,000,000 Canadians will take active part in events organized under the following **themes**:

Diversity and inclusion

Reconciliation with Aboriginal peoples

Environment and youth

Investments announced for Atlantic Canada:

- ▶ **Canada 150 Community Infrastructure Program** — \$33.2 million allocated to projects to improve tourism facilities and infrastructures such as cultural and community centres, museums, parks, and sport and recreational facilities.
- ▶ A \$10 million fund intended for 119 of **Canada's community foundations for cultural and event initiatives** leading up to local celebrations in **2017**. Atlantic Canada accounts for eight of these foundations, including: **PEI**: Community Foundation of PEI; **NB**: Acadian Peninsula, Carleton North, Fredericton and Fundy community foundations; **NS**: Community Foundation of NS and Rural Communities Foundation of NS; **NL**: Community Foundation of Newfoundland and Labrador.

- ▶ **"Signature"** Initiatives including the **Rendez-vous naval 2017** Tall Ships Regatta in Atlantic Canada and the Gulf

Aboriginal tourism



Driven by increasing interest in the historic heritage and traditions of Canada's First Nations, Aboriginal tourism has been growing dramatically. The various First Nations communities are aware of the potential economic benefits in this regard and have been taking action to develop tourism products to meet this burgeoning demand among visitors from provinces across Canada as well as overseas. The **Aboriginal Tourism Association of Canada (ATAC)** rallies Aboriginal communities around promising projects and provides the support and leadership they need to develop their offerings of tourism products that are as authentic as they are competitive and sustainable.

ATAC objectives for 2021

- ▶ boost tourism revenue by \$300 million per year
- ▶ increase the size of the tourism workforce to 40,233 employees
- ▶ add 50 or more new tourism experiences to the existing inventory of 80 tourism experiences
- ▶ achieve an investment level of \$2.6 million annually over 5 years for a total of \$13 million

Useful links: Tourism Industry Association of Canada, www.tiac.travel. Aboriginal Tourism Association of Canada, www.aboriginalcanada.ca. Conference Board of Canada, www.conferenceboard.ca. Canada 150, canada.pch.gc.ca. Destination Canada, www.destinationcanada.com. Innovation, Science and Economic Development Canada, www.ic.gc.ca. Parks Canada, www.pc.gc.ca. Tourism PEI, www.tourismpei.com. Tourism NB, www.tourismnewbrunswick.ca. Tourism NS, www.novascotia.com. Tourism NL, www.newfoundlandlabrador.com. Statistics Canada, www.statcan.gc.ca.

Key figures:

▶ In 2002, Canada's Aboriginal tourism industry employed 12,566 people and generated \$2.28 billion in gross revenue.

▶ In 2015, the same industry employed 33,100 people and generated \$2.65 billion in revenue.

▶ A total of 1,527 enterprises are currently operating in this sector across Canada.

Atlantic Canada

▶ A total of 95,000 Aboriginal people live in 34 communities across the Atlantic Provinces as follows:

PEI: 2; NB: 15; NS:13; NL: 4

▶ 143 companies are active in Aboriginal tourism, accounting for 9% of the tourism sector

Pow-wows

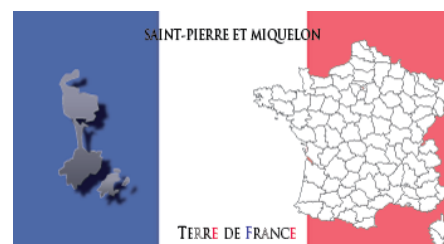
An essential part of festivities drawing visitors from around the world, pow-wows are special events organized by Aboriginal communities to celebrate their cultural heritage through language, music, dancing, singing and traditions. These festive activities provide visitors a unique opportunity to experience the hospitality of Aboriginal communities while also learning more about the traditional culture of the First Nations. Artists and craftspeople also take advantage of pow-wows to promote artworks and artisanal and other local products.

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Saint-Pierre
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France



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Tourism and Clusters



Focus - The South West

A cluster brings together specialists in an area of excellence with a network head company. It consists of businesses, local authorities and a research and training center. There are many clusters dedicated to tourism in France, many under the auspices of **Atout France** (France's tourism development agency).

Atout France contributes to the development of French tourism; its area of operations has expanded to 78 markets (with a presence in New York and Montreal) through projects conducted in collaboration with the departments of French Embassies. It aims to target and effectively promote its partners' tourism initiatives, from project design to marketing.

The Basque country - the GOazen cluster

Upon the initiative of Bayonne's Chamber of Commerce and Industry, this cluster today unites 9 sectors which bring together over 580 companies: hotels, campsites, thalassotherapy centres, social tourism, sites and museums, commercial recreation providers, travel agencies, road passenger transport operators. The cluster is currently developing the global brand "**Biarritz Pays Basque**", for businesses in the local tourism industry. It aims to promote the area, to create and develop other brands, tourism offers and products that make up the Basque Country as a destination. Its objectives: to express their identity, to ensure that development is ethical, sustainable and responsible, and most importantly, to establish a framework for the valuation and recognition of the products and services produced in the Basque Country.

For further information: <http://www.marque-biarritzpaysbasque.com/les-valeurs/>

History and cultural ties link the Basque Country, Atlantic Canada and Saint-Pierre and Miquelon. **The Basque diaspora and North America is one of the international clientele targets for the cluster.** Newfoundland was a Basque colony and has strong ties to its roots. This is why the exchange of experiences and the establishment of a network of economic, cultural and trade partners would be a good way for the international brand "Biarritz Pays Basque" to develop its attractiveness and image.

To request additional information, email: goazen@bayonne.cci.fr

The Goazen cluster allows companies to take "their" place in the joint project, to share resources and tools, in order to implement a joint strategy and promote it among tourism policy makers. The objective is to achieve an opening up of tourism strategies and to create shared and coordinated initiatives between public and private stakeholders.

For further information : CACIMA alexandre.baridon@cacima.fr

Collaboration 

Sectoral Focus



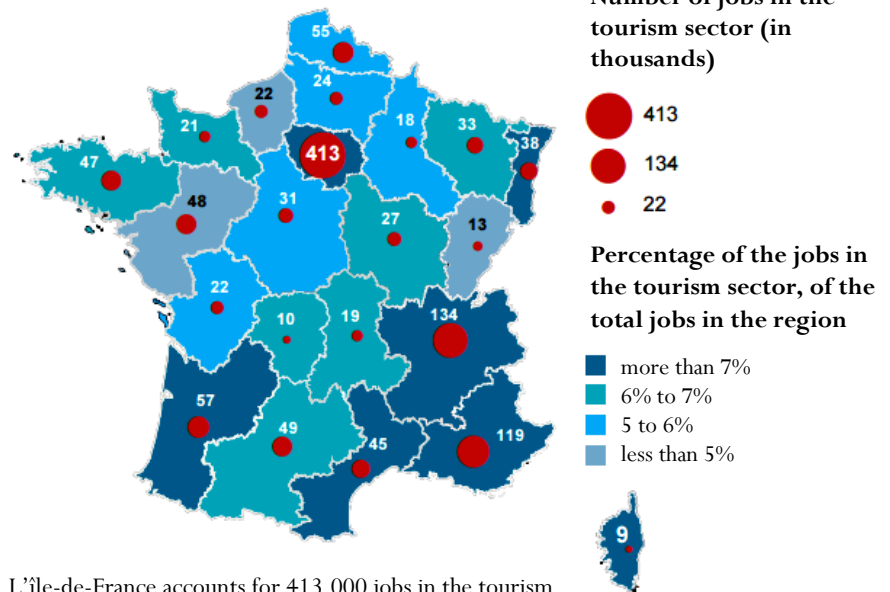
Focus - Coastal France and Saint-Pierre et Miquelon

In France, the coast represents the main tourist destination. On average each year, the French account for 270 million overnight stays and tourists for 92 million. The coast of mainland France is 5,500 km on 3 maritime coastlines, 883 municipalities, 26 departments and 11 regions. The trend is towards cultural visits and heritage, thus creating a second form of attractiveness for these tourist sites, in addition to the seaside.

The Coastal Tourism Cluster

The coastal tourism cluster includes 28 stations distributed along the 3 maritime coastlines (English Channel, Atlantic, and Mediterranean-Corsica). The objective of this cluster is to promote the French seaboard to local markets, but also to those further away, such as Germany, Great Britain, Belgium, the Netherlands and Brazil. Promotional activities are mainly directed towards the general public (active seniors, couples, families with or without children, youth) and the press.

The number of employees in the tourism sector, January 1, 2015



L'île-de-France accounts for 413,000 jobs in the tourism sector, 9.1% of the jobs in the region

« Saint-Pierre & Miquelon, des îles d'Exception »

Within the framework of the action plan of the Strategic Development Plan 2015-2020, the Territorial Collectivity engaged the marketing agencies SCET and MMAP to create a tourism brand that represents Saint-Pierre et Miquelon. A brand that will allow the islands to be better identified and have a more dynamic image; a brand to communicate, meet, collaborate, explore and dream.

**SAINT-PIERRE
— MIQUELON**
Des îles d'exception —

The visual of the brand features both the French signature of the archipelago, as well as the strong ties that bind the two islands.

The idea of connections lies at the heart of the current motivation of tourists. They are searching for affective and emotional connections, the welcome, the exchange, the sharing, the meeting, the openness towards each other, balance and harmony, the creation of memories; they are in search of a place that touches you, enriches you, transforms you... the connection is therefore the expression of humanity and personalization. With the development of the internet and social media, connections are at the heart of the tourism marketing, now and in the future.

The brand "Saint-Pierre et Miquelon", des îles d'exception", reflects this willingness: create a connection between locals and tourists.

Source : foreign visitor survey (EVE), DGE, Banque de France, spm-ct975.

Tourism in France



Some statistics :

85 millions visitors in 2015

42.2 billion euros spent by foreign visitors in France in 2013.

32.3 million hotel visitors in 2013 in Paris, the top tourist destination in the world.

285 500 businesses, 1.25 million people employed.

13.1 billion euro investment in 2013 .

The economic impact of the tourism sector represents **7.3% of the GDP in France**.

Source: atout France/lpsos

Tourism and Generation Y

Ninety-six percent (96%) of the members of Generation Y want to be able to choose where they work, (Study conducted by Orange Business and Sia Partners - April 2014). It is therefore not surprising to hear the response that travel is their first priority, including YOLO experiences (You Only Live Once).

With limited resources, their travel budget is nevertheless significant, (\$ 3,900 per year average budget - Oracle Hospitality Study, conducted in 2016 in the United States).

They search more than 10 different sources and references before choosing their destination (specialized website, blog ...).

This generation is looking for something more from their hotel, in particular emotional extras.

The internet connection is paramount, the hotel is perceived as a place for meeting and discussion and must offer friendly spaces (bar, games room, concert ...).

Smartphone applications are therefore essential for keeping current.

It is important to know the desires and budget of clients, and to focus on them.

Travel trends for the French are evolving: mass tourism is declining and customized experiences are taking its place. Let's do a quick overview:

• Cruises

The cruise market in France is recording increasing growth. There were about 650,000 passengers in 2015. This is a high growth sector, which is resistant to the tourism crisis. The number of passengers has doubled in 6 years. As for travel destinations, the Mediterranean remains well ahead as the favorite destination of the French cruise passengers (61%), the Caribbean is the second destination of choice (19%), followed by Northern Europe (11%), the Islands of the Atlantic (3%) and transatlantic cruises (2%), both of which, however, recorded significant increases.

• Creative Tourism

A new form of tourism placing interaction at the center of the travel experience is growing. Many tourists are asking to be involved in organizing their travel, in order to have a unique, authentic, experience with the opportunity to exchange with locals who are shaping the city of the future, but also to better explore a city and its surroundings. It was in this way that creative tourism emerged about 15 years ago, symbolized by the phenomenon of **greeters**. The inhabitants of an area act as improvised guides who volunteer to show their everyday environment to tourists who request it. This movement, born in New York, has caught on most strongly in France. Organizations that facilitate contact, such as Good Spot or Bienvenue chez nous are emerging.

• Well-being

Sixteen percent (16%) of the French citizens interviewed for a study by TripAdvisor plan to stay in a spa hotel for the first time in 2016. Today 200 establishments in France qualify for the labels "Qualité Spa-A" and "Spas of France", which guarantee a high level of service for their clients.

As for visitors to France, the aim is to increase the length of the stay and to focus on increasing the volume of tourists.

On average, tourists spend 7.2 nights in France (6.7 nights for Europeans, and 9.4 nights for non-Europeans), compared to 6.7 five years ago.

Sources: diplomatie.gouv.fr, Deloitte, Tripadvisor, l'echotouristique, clustertourisme, banque de France, DGE, lhoteellerie-restauration.fr

Want to discover the-
France?

One site:
www.france.fr



Innovative companies



Travel Startups

A network that, since September 2014, has been bringing together on one website, some of the most promising French start-ups in the tourism industry. The goal of this initiative is to change tourism trends by promoting new tools for travel, tailored to the individual.

An overview of the different tools offered in this network that allow the organization of one's trip from A to Z :

Hellotrip permits you to know the ideal time to buy your ticket and makes it easier for a traveller to research destinations. It also allows travellers to select all the destinations that fit their budget, according to the dates of the trip.

Tripconnexion brings together, without intermediaries or commissions, internet travellers and local tourism agencies, guides and associations in order to organize a customized trip.

Monument Tracker is a tourist guide at your fingertips for exploring a city. Assisted by geolocation, this application will send you information about the monuments around you.

VizEat connects hosts who want to share their table and travellers eager to discover a city, a region, a country, in a personalized and original way.

WorldCraze helps connect travellers and locals wishing to purchase products that are not sold in their country. The traveller receives a small fee for bringing back this product to the person who wants it.

Travel Wifi offers mobile Wi - Fi hotspot rental in France for foreigners. The unit fits in a pocket and emits a Wi - Fi network on which 10 devices can connect.

Fizzer allows you to create post cards with your own photos. This application allows you to send personalized postcards using the web and mobile devices. The team then prints the two-sided cards and sends them all over the world.



INTELL-ECHO



Are you seeking business opportunities in this sector?
CACIMA and FCCC-AN can facilitate your business prospection process and help with establishing new partnerships
(targeted information and network contacts)

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Editorial Production: Project Lead, Dr. Monica Mallowan, PROVIS Observatory, Université de Moncton, Shippagan Campus, Shippagan, NB, Canada.
observatoirePROVIS@umoncton.ca
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Chambre d'Agriculture,
de Commerce, d'Industrie,
de Métiers et de l'Artisanat
(CACIMA)

4, boul. Constant Colmay,
BP 4207 97500

Saint-Pierre et Miquelon, France



PROVIS—UNIV. DE MONCTON,
CAMPUS DE SHIPPAGAN

218, J.-D.-Gauthier

Shippagan NB E8S 1P6

Canada



Chambre de Commerce et
d'Industrie Française au Canada—
Réseau atlantique—Atlantic Network
(CCFCRA)

333, av. Acadie,
Dieppe, NB, E1A 1G9

Canada

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Editorial Production: Project manager, Mrs. Janick CORMIER, chamber d'Agriculture, de Commerce, d'Industrie, de Métiers et de l'Artisanat.
Intell-echo@cacima.fr

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