
2010 Nova Scotia Visitor Exit Survey

Report

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**Nova Scotia Department of Economic and
Rural Development and Tourism**

Prepared for:

Nova Scotia Department of Economic and Rural Development and Tourism

September 2011



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Introduction

This report presents the results of the **2010 Nova Scotia Visitor Exit Survey (VES)**, as prepared by Corporate Research Associates Inc., on behalf of the Nova Scotia Department of Economic and Rural Development and Tourism. The Nova Scotia Visitor Exit Survey had two primary objectives:

- To develop key tourism statistics used to calculate industry activity. For example, the survey measured both party size and average expenditures, which are key indicators associated with Nova Scotia's tourism industry; and
- To provide trip and visitor profile information. For example, the survey collected data related to visitors' trip purpose, activities visitors participated in while visiting the province, and satisfaction with the overall Nova Scotia trip experience.

A total of 6,400 questionnaires (5,980 online, 420 telephone) were completed with overnight visitors aged 18 years or older who stayed at least one night in Nova Scotia in 2010. Data was captured between January 20, 2010 and January 11, 2011.

Questionnaires were completed via two modes: self-complete using an online survey interface or by telephone. In either case, a sample of travellers exiting the province through the Halifax Stanfield International Airport, North Sydney, Digby, Pictou, or Highway 104 (Cobequid Pass) received a VES Response Card. The Survey Response Card invited visitors who had spent at least one night in Nova Scotia to complete the VES online or to call a toll free telephone number to complete the survey with the assistance of a telephone interviewer.

The 2010 survey marked the first time that full-year data was captured. In addition, the 2010 survey launched a new methodology for the VES. In the 2004 VES, visitors were interviewed on-site at key exit points. An exception was Highway 104, where a limited trial of the Survey Response Card was conducted. For the 2010 Exit Survey, Survey Response Cards were deployed at all major exit points, including Highway 104. The new methodology provided improved coverage as it facilitated access to traffic leaving Nova Scotia at the highest volume exit point: Amherst (Highway 104).

Due to the longer data collection period, comparisons to 2004 were made using questionnaires collected between June and November 2010 (the same data collection period as in 2004). As such, the results shown in the 2010-2004 comparisons may differ from the 2010 results reported for the entire year.

Detailed data tables are included in Appendix A of this report. References to the data tables where more detailed information are found are made within the body of this report.



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Executive Summary

The average travel party to Nova Scotia consisted of 2.1 people with those travelling by RV and car reporting larger party sizes compared with those travelling to Nova Scotia by air. The most common travel party type was couples. Compared with 2004, party size and composition were generally consistent.

Close to one-half of visitor parties included a member aged 55 years or older with a further one-third including someone between 45 and 54 years of age. Minor fluctuations in age were observed compared with 2004 results.

The length of stay in the province averaged 5.1 nights in 2010. Overseas visitors and Canadians from Manitoba westward (including the Territories) stayed the longest with an average stay of over 8 nights in the province. Atlantic Canadians spent the least amount of time in Nova Scotia with an average stay of 2.9 nights. Visitors to Nova Scotia in 2010 tended to have shorter stays when compared with 2004. An increase in stay length among pleasure visitors was more than offset by declines among both VFR and business visitors.

The average visitor expenditure in Nova Scotia in 2010 was \$1,052 per party. Taking party size and length of stay into account, visitors to Nova Scotia spent approximately \$98 per person per day during their visit. Visitors spent the most on fixed-roof accommodations and meals and beverages in restaurants, although these figures varied by trip purpose, mode of travel and market region. Total expenditures were highest among overseas visitors followed by those from Western Canada, and lowest among visitors from Atlantic Canada. Compared with previous years, visitors' expenditures increased in 2010. When 2004 expenditures were adjusted for inflation 2010 expenditures remained higher than those recorded in 2004.

The most common trip purpose was to visit friends or relatives. Visitors from the US were more likely to indicate they were travelling for general pleasure as opposed to visiting friends or relatives. Those from Quebec were equally likely to report visiting friends or relatives, or general pleasure, as their trip purpose. Among visitors travelling for business, one-quarter extended their business trip to spend extra time in Nova Scotia to visit the local area. Comparing 2010 with previous years, visitors in 2010 were less likely to be travelling for pleasure, and more likely to be visiting friends or relatives.

Among the one-third of visitors travelling to Nova Scotia for pleasure, the key reasons included a desire to visit Atlantic Canada, a desire to visit a specific area or location in Nova Scotia or an opportunity to visit friends or relatives.

For the vast majority of visitors in 2010 (an increase from 2004), this was not the first time they had been to Nova Scotia. This was especially true for visitors from Atlantic Canada. Visitors from US Mid-Atlantic or another US location (excluding New England) were least likely to have previously visited Nova Scotia.



Four in ten visitors participated in outdoor activities while in Nova Scotia, the most common including coastal sightseeing, hiking, and beach exploring. The Halifax waterfront is a key Nova Scotia destination with four in ten visitors indicating they visited the Halifax waterfront on their trip. Other frequently visited places or events included craft shops or studios, nightclubs/lounges/pubs, and museums/historic sites.

Three in ten visitors consulted www.novascotia.com. Among these visitors, most consulted www.novascotia.com after making the decision to travel to Nova Scotia, when planning the trip details, to find activities to do or to locate accommodations. The usefulness of the Nova Scotia tourism website received a favourable assessment. Overall use of the Internet to find information about Nova Scotia was considerably higher in 2010 compared with previous years.

The timing of the decision to visit Nova Scotia varied from as little as less than two weeks to as long as three to four months prior to departure. The majority of visitors made their first booking for their Nova Scotia trip within the four weeks prior to their departure. Most visitors made their first reservation directly with the property via Internet or telephone. These results are generally consistent with previous years.

Personal electronic devices were common tools used for finding information about Nova Scotia with six in ten visitors reporting they used such a device.

Overall, 24 percent of visitors stopped at a Visitor Information Centre (VIC) at some point during their visit, while 16 percent stopped at a VIC when they first entered the province. Those travelling by RV were significantly more likely than car or air visitors to stop at a VIC. VICs were influential in shaping visitors' trips; among those who stopped at a VIC, about three in ten indicated their stop at a VIC resulted in their taking part in an activity or event, or visiting a part of the province they would not otherwise have gone. Visitation of VICs declined in 2010 compared with previous years.

Just over one-third of visitors reported some impact of environmental sustainability on how they travel. Close to two in ten visitors ensure all their travel minimizes impact on the environment and a similar proportion has researched sustainable tourism in order to make environmentally sustainable choices when they travel.

Visitor satisfaction with their Nova Scotia trip was high across all markets, transportation methods and trip purpose segments. In addition, visitors were highly likely to recommend Nova Scotia to others as a place to visit. Visitors rated specific aspects of their trip; the highest ratings were given to the opportunity to visit friends and family, the seacoast, the natural landscape and wildlife, and the culture and people. One-half of visitors offered suggestions about how their Nova Scotia experience might have been improved. The two most frequently mentioned improvement areas are outside of the province's influence: better weather and a desire to spend more time in the province or visit at a different time of year.



Detailed Analysis

The following results are based on a detailed analysis of visitors to the province in 2010. More than 6,400 questionnaires were completed between January 20, 2010 and January 11, 2011.

Where applicable, comparative 2010 (data from surveys completed between June 24 and November 21 2004/2010) and 2004 data are presented.

Party and Trip Characteristics

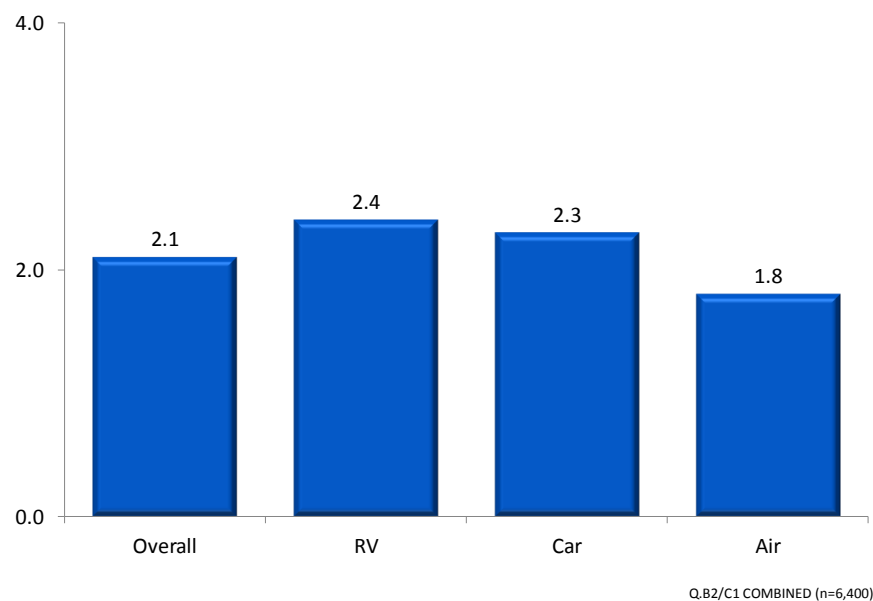
This section focuses on travel party characteristics and discusses results that pertain to the party as a whole as opposed to the individual visitor.

Party Characteristics

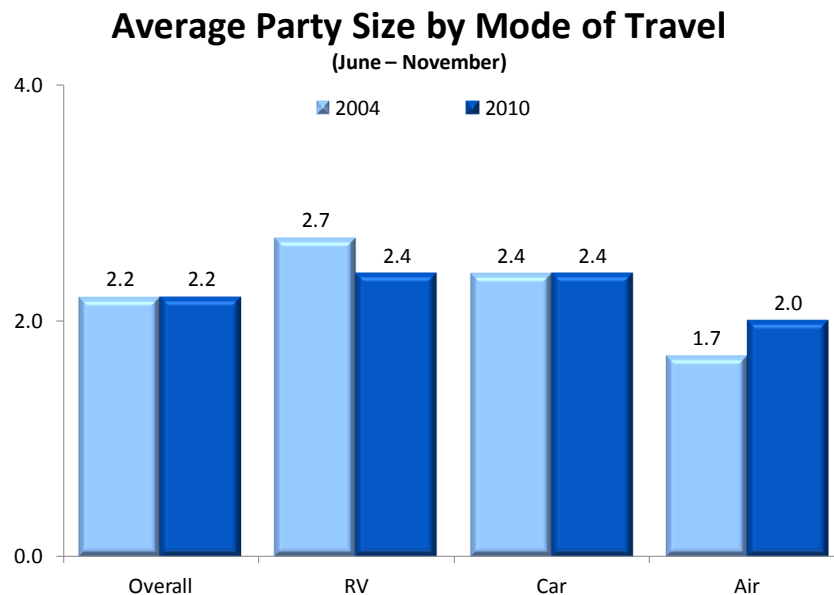
Average Party Size

The average party size was just over two people. The average party size for car and RV travellers was slightly larger than the average party size for air travellers. Those travelling by car or RV were most likely to report party sizes of two. Air travellers were most likely to be travelling alone. (Table B2/C1 Combined)

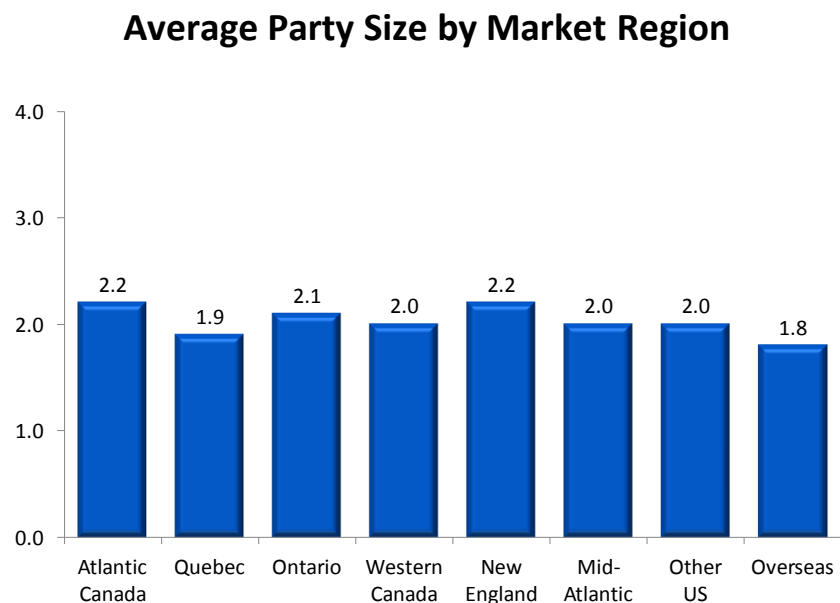
Average Party Size by Mode of Travel



Comparing 2010 and 2004, the average party size in 2010 was unchanged. Some differences were noted by mode of travel; the average party size among RV travellers was smaller in 2010 while the average party size among air travellers rose slightly. (Table B2/C1 Combined)



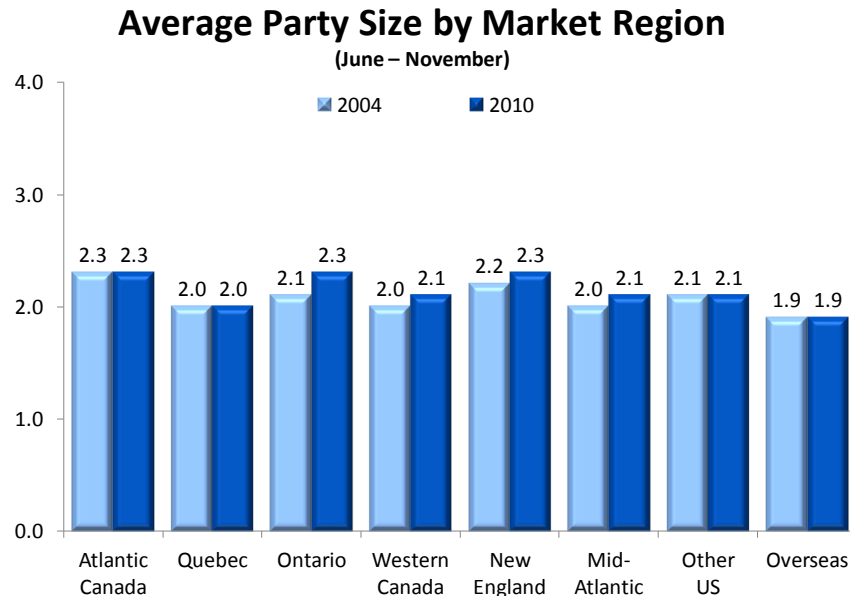
Average party size was consistent across most regions, although overseas parties tended to be slightly smaller compared with those from North America. Pleasure travellers averaged 2.5 people per party, while those in the province on business had an average party size of 1.6 individuals. (Table B2/C1 Combined)



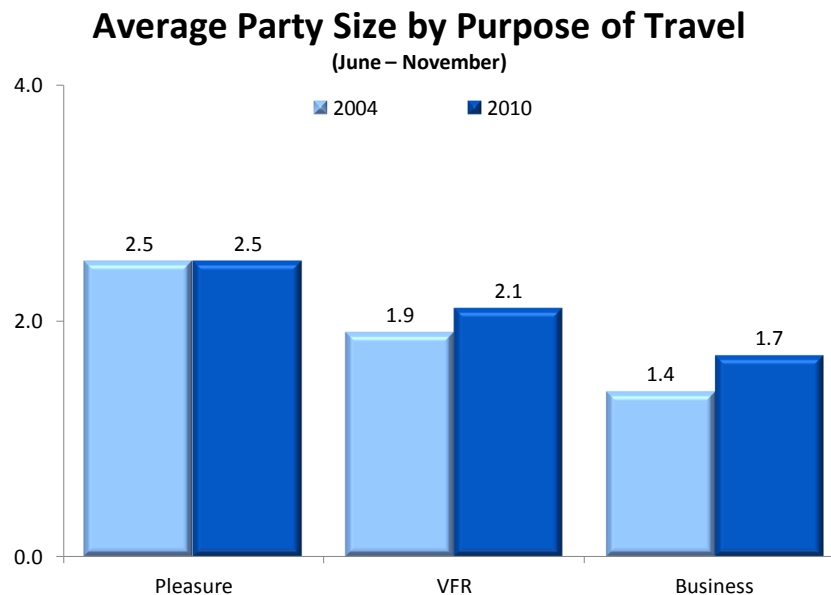
Q.B1/C1 COMBINED (n=6,400)



For the most part, party sizes in 2010 remained consistent with those reported in 2004 with travellers from Ontario and New England reporting slightly larger party sizes in 2010. (Table B2/C1 Combined)

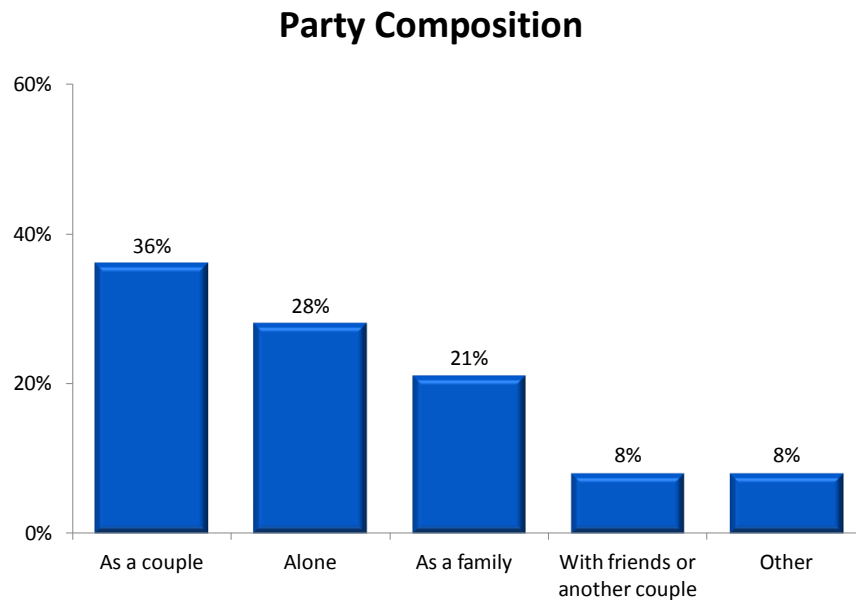


Comparing 2010 and 2004 results, those travelling for pleasure registered no change in average party size, while both VFR and business travellers reported larger party sizes in 2010. (Table B2/C1 Combined)



Party Composition

Close to four in ten parties travelled as a couple, while three in ten travelled alone and two in ten travelled as a family. Results indicated a relationship between mode of travel and party composition. Those who travelled to the province by RV were considerably more likely to be couples, while air visitors were more likely to have travelled to the province alone. (Table D10)

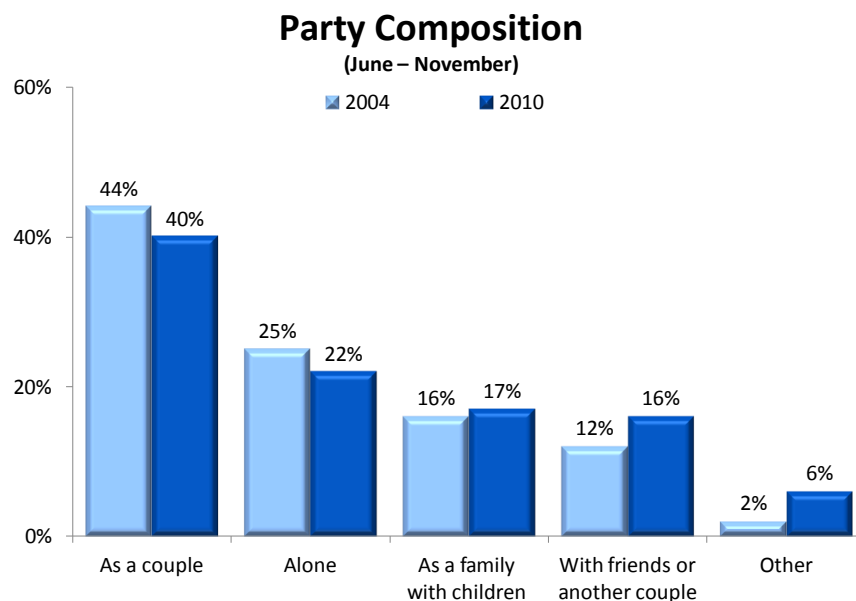


Q.D10 (n=6,400)

Results across the market regions varied only slightly. Not surprisingly, business travellers were considerably more likely to be travelling alone than those travelling for pleasure or those visiting friends and/or relatives (VFR). (Table D10)



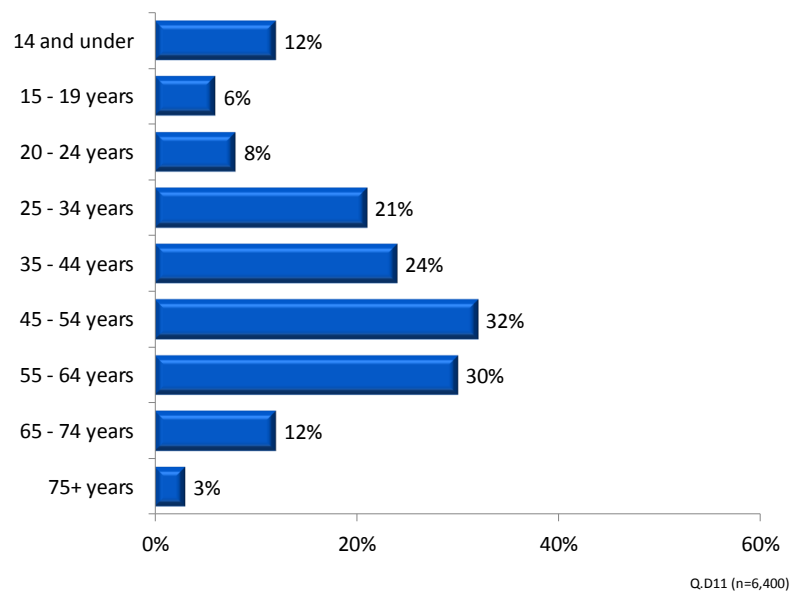
In 2010, visitors to Nova Scotia were more likely to be travelling as a group with friends or another couple and less likely to be travelling alone, or as a couple, compared with 2004. (Table D10)



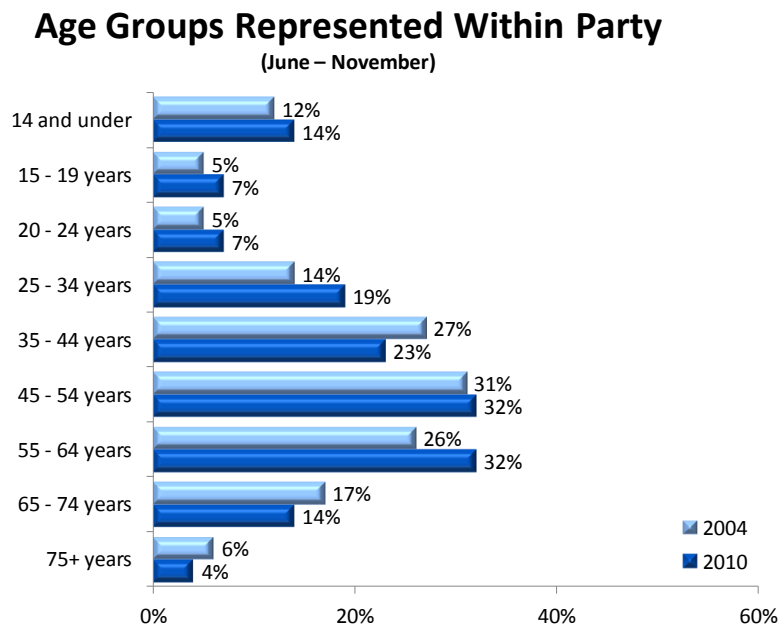
Age

Parties represented a variety of age groups. Parties who arrived in the province by RV were generally older than those who came to the province by car or airplane. In fact, 47 percent of RV parties had a member aged 55 to 64, considerably higher than the 30 percent who travelled by automobile and the 30 percent that travelled by airplane. Moreover, three in ten RV travellers had someone in their party aged 65 to 74, while just 13 percent of car travellers and 9 percent of those who travelled by air reported the same. Consistent with the higher proportion of air travellers who visited alone, this group was also the least likely to have a member of their party aged 14 years old or under (6%). (Table D11)

Age Groups Represented Within Party



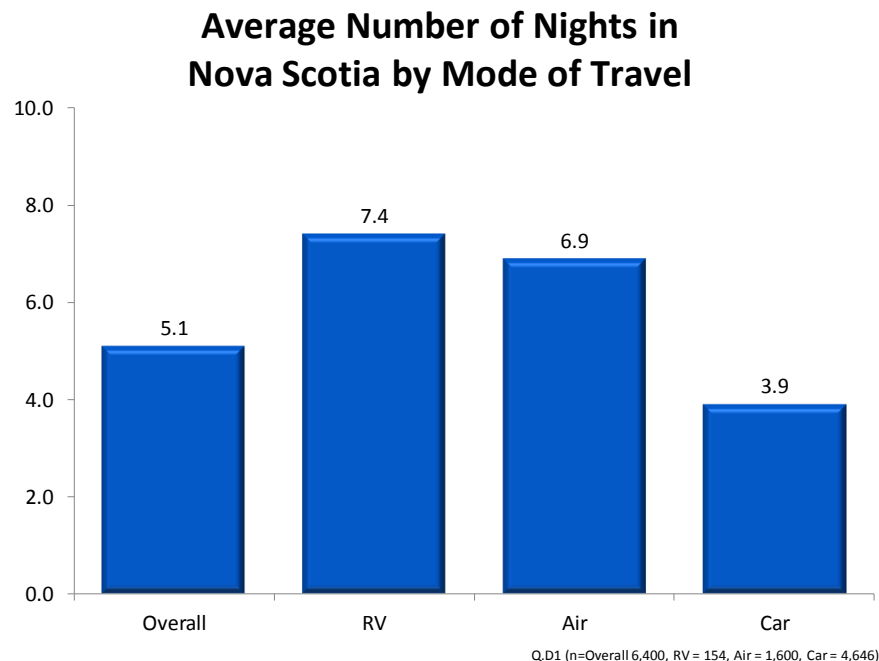
The incidence of the various age groups represented within travel parties fluctuated between 2004 and 2010. The most significant changes occurred in the 35-44 age group, which was less prevalent in 2010, and the 55-64 age group, which was more prevalent in 2010. (Table D11)



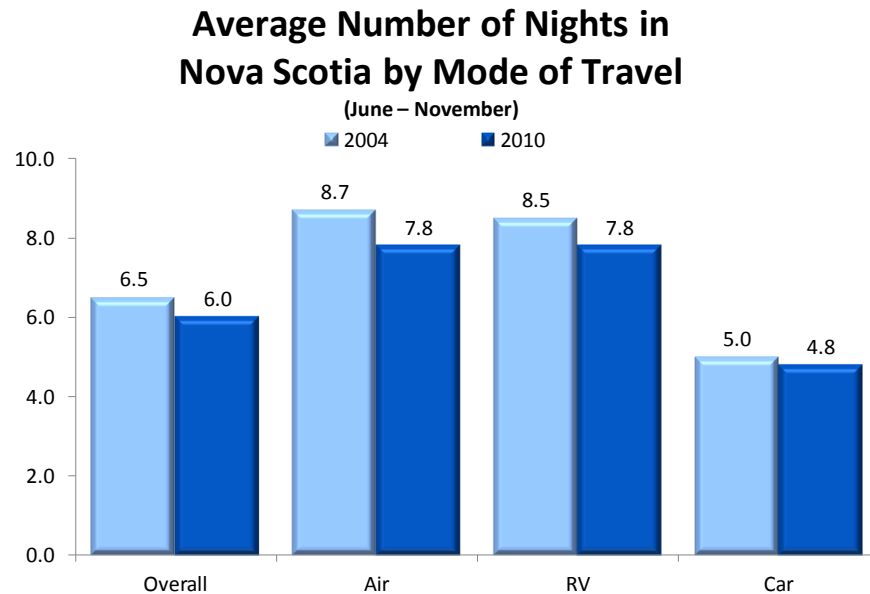
Trip Characteristics

Length of Stay

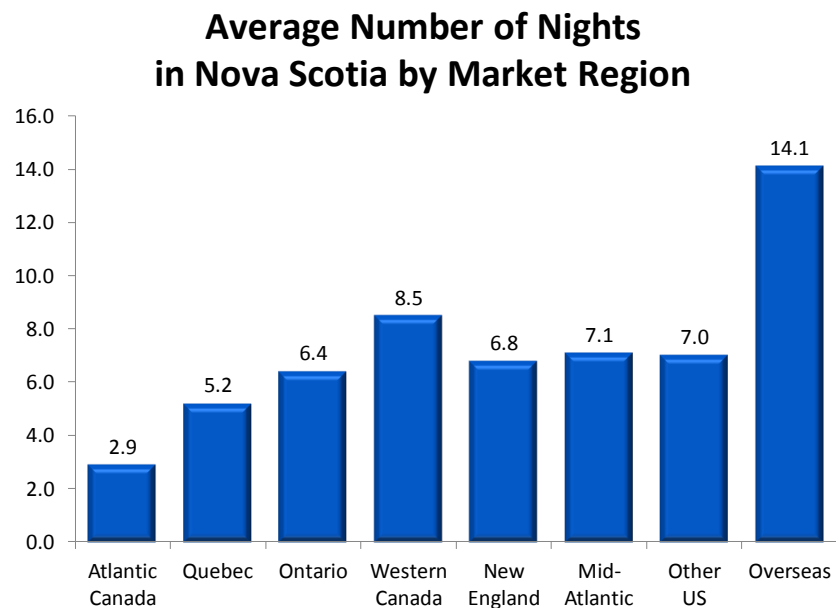
The average number of nights spent in Nova Scotia was 5.1. Parties who arrived by RV or airplane spent considerably more time in the province compared with those who travelled by car. (Table D1)



Trip length declined from an average of 6.5 nights in 2004 to 6.0 nights in 2010. This decline in trip length was most evident among air and RV travellers. (Table D1)



Atlantic Canadians spent the fewest nights in Nova Scotia, while those from Western Canada (consists of Manitoba westward including the Territories) and overseas visitors spent the most nights. Among US visitors, those from the New England region spent slightly fewer nights compared with other US visitors. (Table D1)

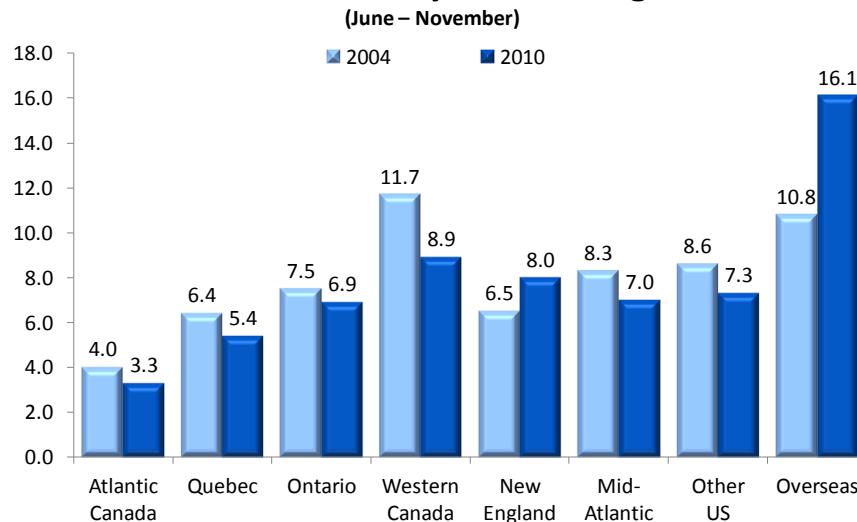


Q,D1 (n=6,400)



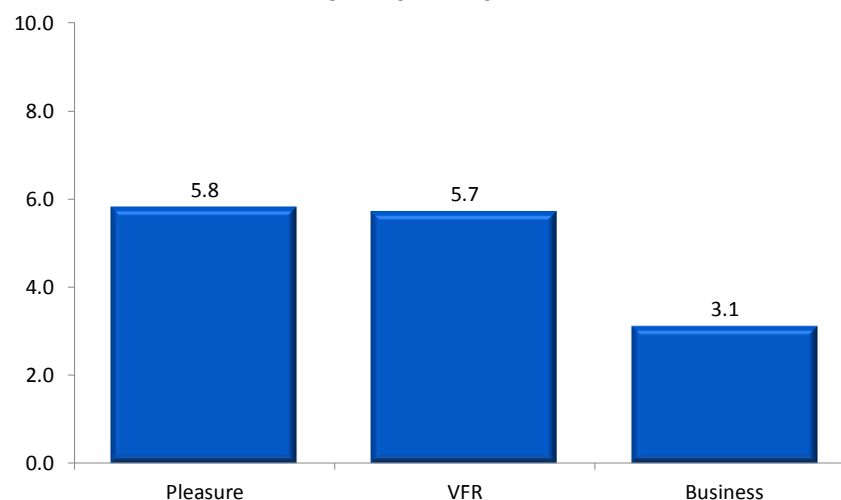
Comparing 2010 and 2004, there were fluctuations in the average number of nights spent in Nova Scotia for all regions with declines observed for all but New England and overseas visitors. (Table D1)

Average Number of Nights in Nova Scotia by Market Region



Those travelling for pleasure or to visit family or friends spent more nights in Nova Scotia compared with those travelling for business. (Table D1)

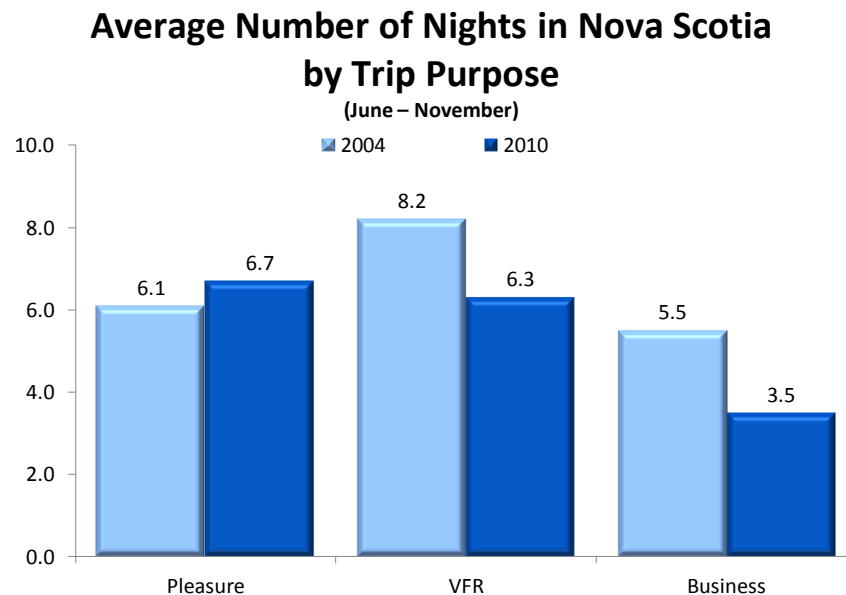
Average Number of Nights in Nova Scotia by Trip Purpose



Q.D1 (n=6,400)

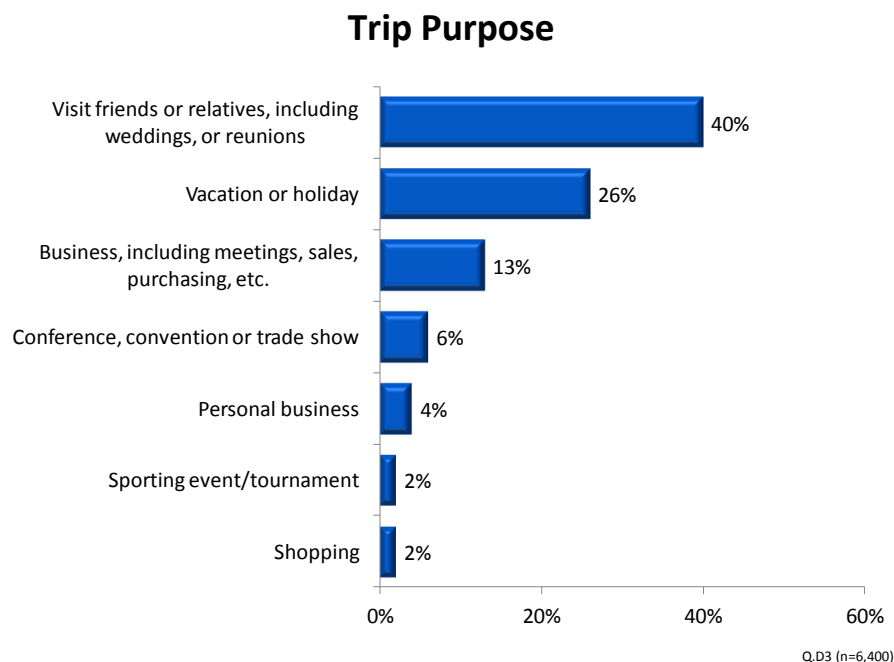


Comparing 2010 and 2004, VFR and business travellers spent less time, while pleasure travellers spent more time in the province. (Table D1)

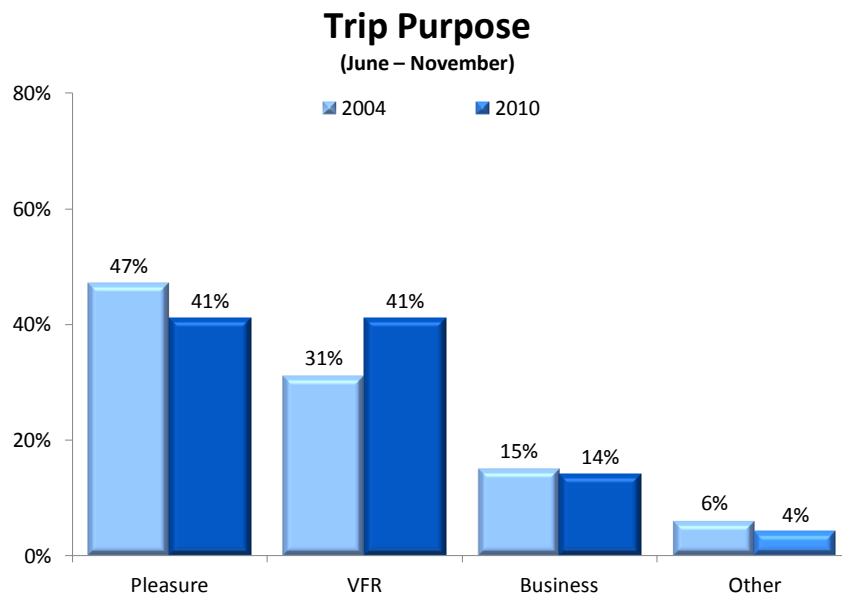


Trip Purpose

In 2010, visitors to Nova Scotia were most likely to be travelling to the province to visit friends or relatives (VFR) or for a vacation or holiday. (Table D3)

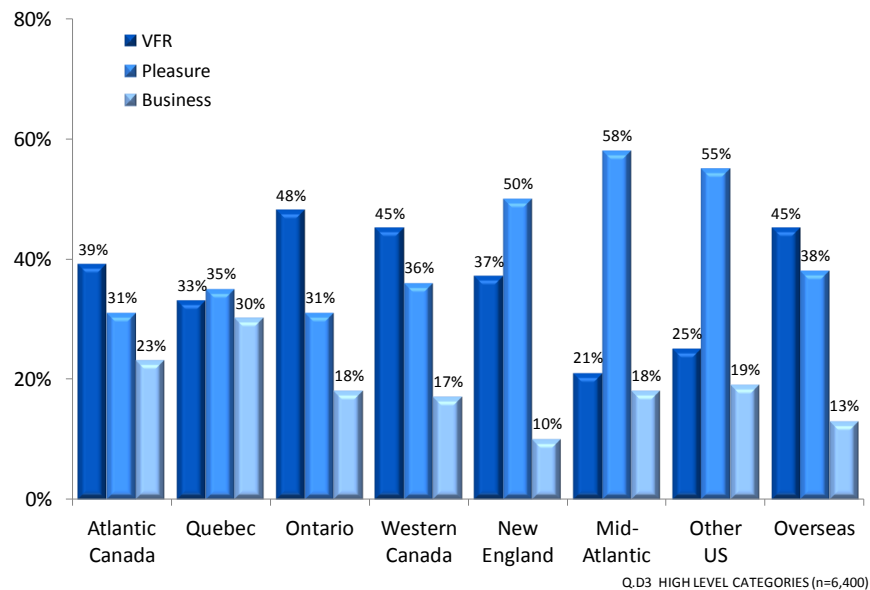


Comparing 2010 and 2004, 2010 visitors were less likely to be travelling for pleasure and more likely to be travelling to visit friends or relatives. (Table D3)



Visitors from the United States were most likely to have visited the province for pleasure. With the exception of Quebec, visitors from Canada were most likely to be travelling to Nova Scotia to visit friends or relatives, while Quebec residents were more equally split between visiting friends and relatives, pleasure, and business. Compared with other regions, Quebec visitors were most likely to be visiting the province for business. (Table D3)

Trip Purpose by Market Region

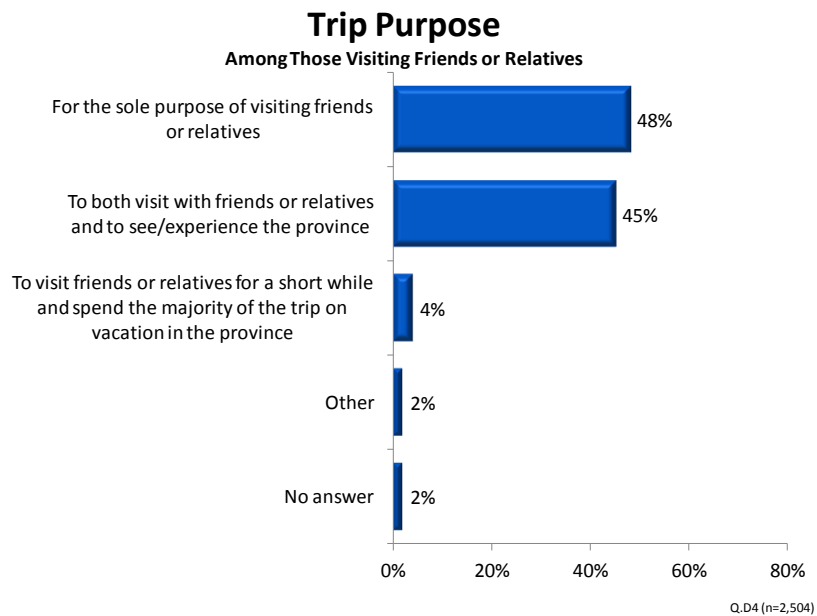


Comparing 2010 and 2004 results by market region, there was an increase in the proportion of business travellers across regions, an increase in the proportion of VFR travellers for most regions, and a corresponding decrease in the proportion of pleasure travellers across most regions. (Table D3)

| Trip Purpose by Market Region (June – November) | | | | | | |
|--|-------|------|------------|------|------------|------|
| | VFR % | | Pleasure % | | Business % | |
| | 2004 | 2010 | 2004 | 2010 | 2004 | 2010 |
| Atlantic Canada | 29 | 43 | 43 | 35 | 9 | 16 |
| Quebec | 28 | 33 | 48 | 46 | 12 | 20 |
| Ontario | 40 | 46 | 40 | 40 | 8 | 11 |
| Western Canada | 53 | 46 | 31 | 40 | 3 | 13 |
| New England | 20 | 32 | 72 | 61 | 3 | 6 |
| Mid-Atlantic | 19 | 16 | 70 | 71 | 2 | 10 |
| Other US | 16 | 24 | 67 | 62 | 4 | 13 |
| Overseas | 29 | 39 | 51 | 46 | 8 | 12 |



Among those who came to the province to visit friends or relatives, their purpose was split between spending their entire trip with friends or family or combining their visit with seeing the province. Visitors from Atlantic Canada (56%) were more likely to come to Nova Scotia for the sole purpose of visiting friends or relatives. (Table D4)

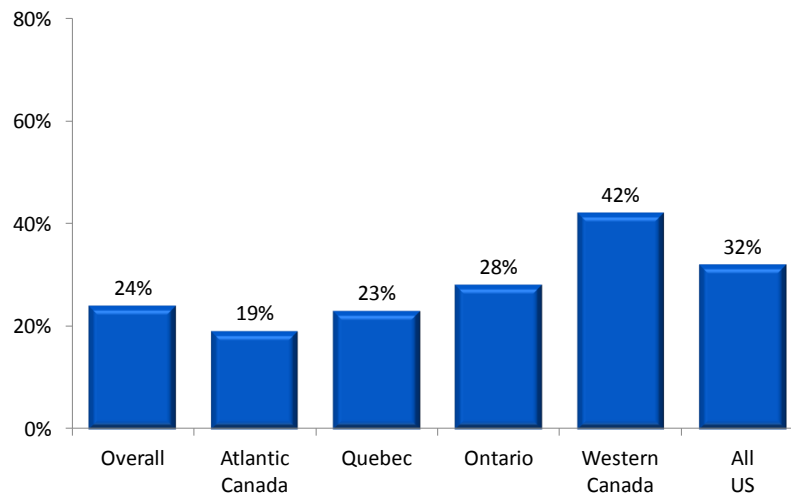


Combining Business with Pleasure

One in four business travellers spent extra time in Nova Scotia to visit the local area. Business travellers from Western Canada were most likely to extend their trip. (Table D5)

Extended Trip to Nova Scotia to Visit Local Area

Among Business Travellers
% Saying Yes



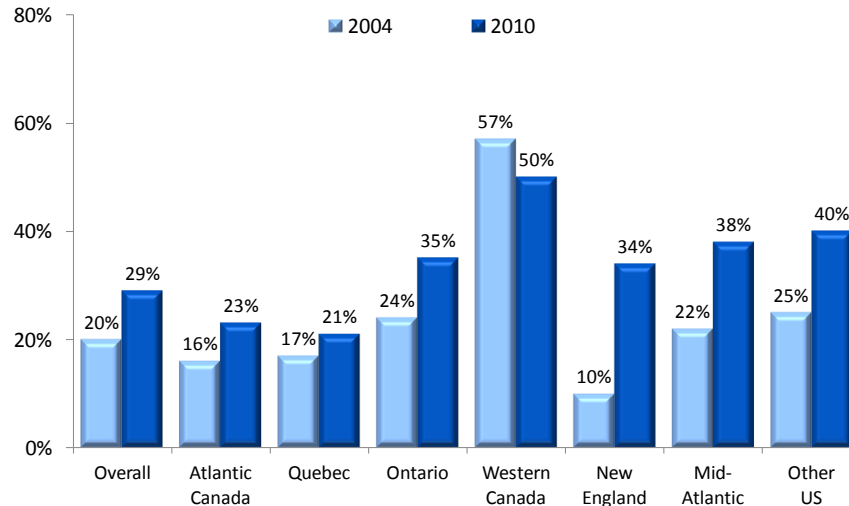
Note: International visitors not shown due to small sample size.

Q.D5 (n=1,080)

Business travellers to Nova Scotia in 2010 were more likely than 2004 business travellers to indicate they extended their trip to visit the local area. This increase was evident across most regions, with the exception of business travellers from Western Canada. (Table D5)

Extended Trip to Nova Scotia to Visit Local Area

Among Business Travellers, % Saying Yes
(June – November)



Note: International visitors not shown due to small sample size.



Among business travellers who spent extra time in Nova Scotia, the average trip was extended by 1.8 nights. Comparing 2010 and 2004, the number of nights business trips were extended declined significantly in 2010 (1.8 nights, down from 8.6 nights reported in 2004). (Table D6)

Close to two in ten (17%) business travellers brought someone not specifically involved in their business trip with them. Mode of travel was strongly related to whether or not business travellers brought along a friend or family members. Specifically, 24 percent of business travellers who arrived by automobile indicated non-business individuals had made the trip with them, while 10 percent of air business travellers had a non-business individual accompany them. Atlantic Canadians (22%), followed by Western Canadians (20%) were most likely to have a non-business individual travelling with them. (Table D7)

In 2010, more business travellers brought a companion than in 2004 (21% in 2010 compared with 15% in 2004). (Table D7)



Trip Expenditures

The table below shows the average expenditures in Nova Scotia for all travel parties and by trip purpose. Pleasure travellers spent the most while those on business and those visiting friends and relatives (VFR) spent considerably less (major expenditures excluded). (Table D22/D24)

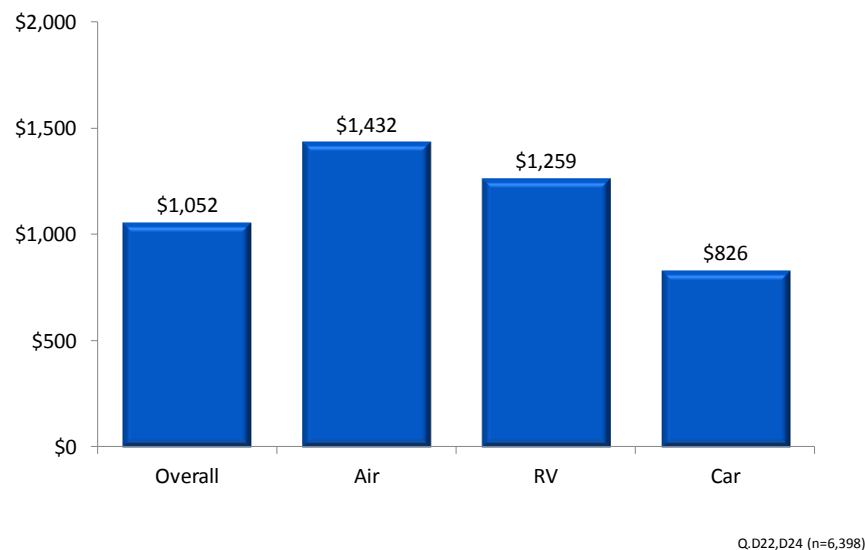
| 2010 Average Expenditure Per Party | | | | |
|---|----------------|--------------|----------------|--------------|
| Type of Expenditure | Overall | Business | Pleasure | VFR |
| Fixed-roof accommodations | \$281 | \$399 | \$426 | \$109 |
| Campgrounds | \$9 | \$0 | \$25 | \$2 |
| Meals in restaurants/hotels/bars | \$238 | \$227 | \$312 | \$191 |
| Groceries and liquor | \$81 | \$26 | \$104 | \$93 |
| Gas, oil and/or auto repair | \$105 | \$55 | \$149 | \$95 |
| Car rental fees, including insurance | \$75 | \$66 | \$116 | \$51 |
| Local transportation (taxis, limos, etc.) | \$10 | \$22 | \$8 | \$5 |
| Bridge/Highway/Ferry tolls in Nova Scotia | \$5 | \$4 | \$6 | \$5 |
| NS cultural products | \$39 | \$14 | \$64 | \$34 |
| Clothing | \$70 | \$43 | \$77 | \$77 |
| Other shopping | \$70 | \$33 | \$81 | \$72 |
| Culture and entertainment | \$41 | \$20 | \$74 | \$27 |
| Sport and recreation | \$14 | \$4 | \$29 | \$8 |
| Parking | \$0 | \$0 | \$0 | \$0 |
| Total Expenditures | \$1,052 | \$922 | \$1,473 | \$774 |

Parties spent the most on fixed-roof accommodations and meals and beverages in restaurants, with these expenditures accounting for approximately one-half of total expenditures. The only other expenditure category exceeding \$100 was gas, oil and/or auto repair. On average, US visitors (excluding New England), overseas, and Western Canadian visitors spent the most on fixed-roof accommodations and meals while Atlantic Canadians spent the least.



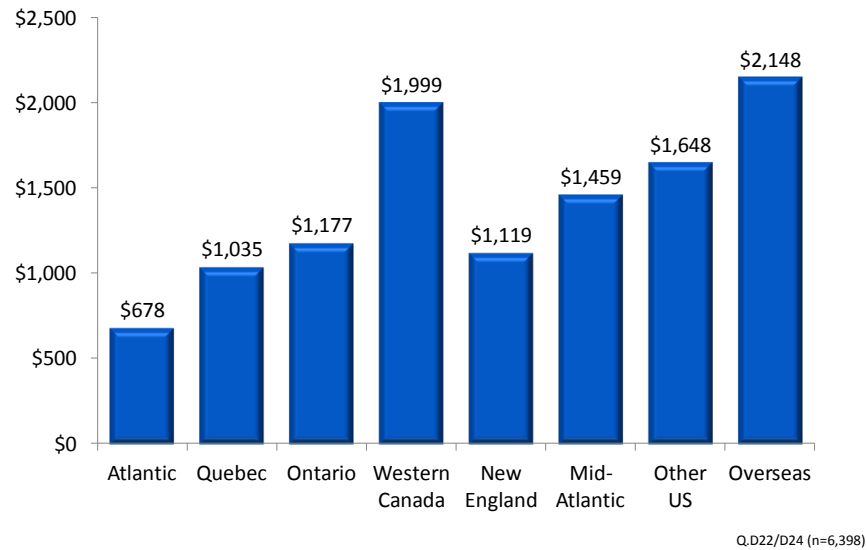
Average travel party spending was highest among parties travelling by RV and air, with automobile travellers spending considerably less. Air travellers spent more than those travelling by other modes on fixed-roof accommodations, meals, and taxis/car rentals, while visitors travelling by RV spent significantly more on campgrounds, vehicle costs (e.g., repairs, gas, oil), and groceries/liquor. (Table D22/D24)

Total Party Expenditures by Mode of Travel



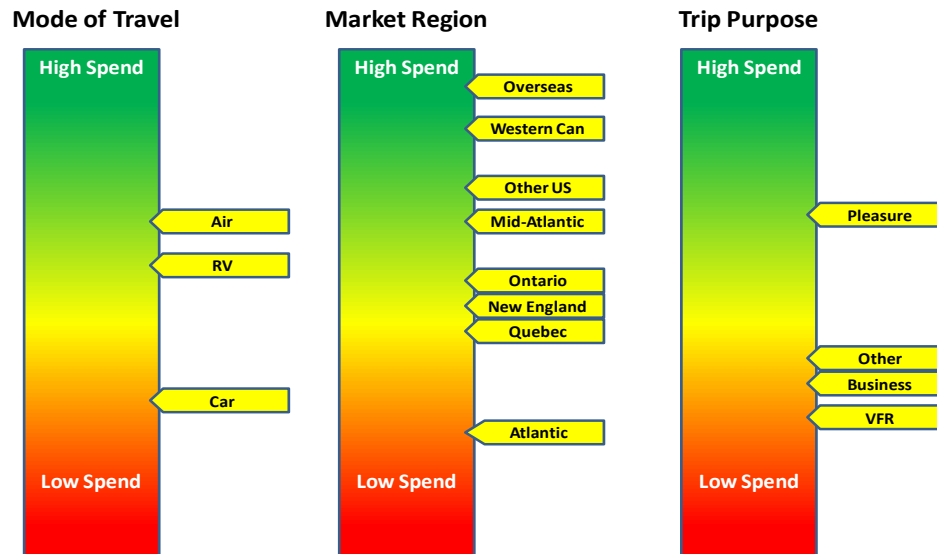
On average, the highest total expenditures were reported by overseas visitors followed by Western Canadian visitors. Once again, Atlantic Canadian visitors spent the least.

Total Party Expenditures by Market Region



For ease of comparison across key subgroups, total party spending (excluding major purchases) was indexed against the average party expenditures among all visitors. The following graph illustrates the position on the expenditure index by mode of travel, market region and trip purpose. As is evident in the graph, visitors from overseas and Western Canada were the highest spending visitors. In contrast, those travelling by car, those from Atlantic Canada and those in Nova Scotia on business or to visit friends and relatives spent considerably less than other groups of travellers.

Indexed Party Expenditures by Key Visitor Subgroups



Spending varies across key subgroups mainly because of differences in party size and length of stay. To control for these factors, per person per day average spending amounts are used. On average, each visitor to the province spent approximately \$98 per day during their trip. Per person daily spending was highest among business travellers. It was also relatively higher among air visitors and those from Other US and Western Canada regions. In contrast, per person daily expenditures were lowest among those travelling by RV, those visiting friends and relatives, and New England residents.

| Expenditures Per Person Per Day Among Key Visitor Subgroups | | | |
|--|-------|----------------|-------|
| Market Region | | Trip Purpose | |
| Western Canada | \$118 | Business | \$187 |
| Other US | \$117 | Pleasure | \$103 |
| Atlantic Canada | \$108 | VFR | \$67 |
| Quebec | \$107 | Mode of Travel | |
| Mid-Atlantic | \$102 | | |
| Ontario | \$88 | | |
| Overseas | \$83 | | |
| New England | \$76 | | |
| | | Air | \$116 |
| | | Car | \$92 |
| | | RV | \$72 |



The following table illustrates comparable categories from 2010 and 2004. Regardless of purpose of trip, visitors to Nova Scotia in 2010 spent more across nearly every category. (Table D22/D24)

| Average Expenditure Per Party (June – November) | | | | | | | | |
|--|--------------|----------------|--------------|----------------|----------------|----------------|--------------|--------------|
| | Overall | | Business | | Pleasure | | VFR | |
| | 2004 | 2010 | 2004 | 2010 | 2004 | 2010 | 2004 | 2010 |
| Fixed-roof accommodations | \$288 | \$327 | \$324 | \$465 | \$403 | \$487 | \$126 | \$130 |
| Campgrounds | \$13 | \$15 | \$1 | \$1 | \$23 | \$33 | \$4 | \$2 |
| Meals in restaurants/ hotels/bars | \$242 | \$274 | \$175 | \$266 | \$315 | \$345 | \$174 | \$215 |
| Groceries and liquor | \$63 | \$102 | \$21 | \$31 | \$74 | \$123 | \$69 | \$107 |
| Gas, oil and/or auto repair | \$98 | \$125 | \$48 | \$48 | \$134 | \$171 | \$74 | \$109 |
| NS cultural products | \$48 | \$51 | \$21 | \$19 | \$60 | \$77 | \$41 | \$40 |
| Clothing | \$47 | \$77 | \$40 | \$52 | \$45 | \$72 | \$55 | \$89 |
| Other shopping | \$22 | \$73 | \$14 | \$36 | \$16 | \$86 | \$24 | \$69 |
| Total Expenditures | \$947 | \$1,243 | \$750 | \$1,060 | \$1,218 | \$1,672 | \$677 | \$887 |

The following table illustrates comparable categories from 2010 and 2004, with 2004 expenditures adjusted for inflation. 2010 expenditures were higher when compared with the adjusted 2004 expenditures across most categories. (Table D22/D24)

| Average Expenditure Per Party (June – November) | | | | | | | | |
|--|----------------|----------------|--------------|----------------|----------------|----------------|--------------|--------------|
| | Overall | | Business | | Pleasure | | VFR | |
| | 2004* | 2010 | 2004* | 2010 | 2004* | 2010 | 2004* | 2010 |
| Fixed-roof accommodations | \$323 | \$327 | \$364 | \$465 | \$453 | \$487 | \$141 | \$130 |
| Campgrounds | \$15 | \$15 | \$1 | \$1 | \$26 | \$33 | \$4 | \$2 |
| Meals in restaurants/ hotels/bars | \$272 | \$274 | \$197 | \$266 | \$354 | \$345 | \$195 | \$215 |
| Groceries and liquor | \$71 | \$102 | \$24 | \$31 | \$83 | \$123 | \$77 | \$107 |
| Gas, oil and/or auto repair | \$110 | \$125 | \$54 | \$48 | \$150 | \$171 | \$83 | \$109 |
| NS cultural products | \$54 | \$51 | \$24 | \$19 | \$67 | \$77 | \$46 | \$40 |
| Clothing | \$53 | \$77 | \$45 | \$52 | \$51 | \$72 | \$62 | \$89 |
| Other shopping | \$25 | \$73 | \$16 | \$36 | \$18 | \$86 | \$27 | \$69 |
| Total Expenditures | \$1,063 | \$1,243 | \$842 | \$1,060 | \$1,368 | \$1,672 | \$760 | \$887 |

*Adjusted for inflation (12.3%)



Consistent with the increase in overall travel party expenditures, per person per day average expenditures were higher in 2010 compared with 2004. The only exception was among New England visitors.

| Expenditures Per Person Per Day Among Key Visitor Subgroups (June- November) | | | | | |
|--|------|--------------|----------------|------|--------------|
| Market Region | 2004 | 2010 | Trip Purpose | 2004 | 2010 |
| Western Canada | \$61 | \$116 | Business | \$95 | \$177 |
| Other US | \$88 | \$116 | Pleasure | \$81 | \$99 |
| Mid-Atlantic | \$75 | \$110 | VFR | \$42 | \$65 |
| Quebec | \$79 | \$103 | | | |
| Atlantic Canada | \$60 | \$98 | Mode of Travel | 2004 | 2010 |
| Ontario | \$69 | \$83 | Air | \$77 | \$111 |
| Overseas | \$63 | \$77 | Car | \$67 | \$84 |
| New England | \$74 | \$71 | RV | \$52 | \$70 |

Comparing 2010 expenditures with 2004 expenditures that have been adjusted for inflation, per person per day average expenditures were higher in 2010. Again, the only exception was among New England visitors.

| Expenditures Per Person Per Day Among Key Visitor Subgroups (June- November) | | | | | |
|--|-------|--------------|----------------|-------|--------------|
| Market Region | 2004* | 2010 | Trip Purpose | 2004* | 2010 |
| Western Canada | \$69 | \$116 | Business | \$107 | \$177 |
| Other US | \$99 | \$116 | Pleasure | \$91 | \$99 |
| Mid-Atlantic | \$84 | \$110 | VFR | \$47 | \$65 |
| Quebec | \$89 | \$103 | | | |
| Atlantic Canada | \$67 | \$98 | Mode of Travel | 2004* | 2010 |
| Ontario | \$77 | \$83 | Air | \$86 | \$111 |
| Overseas | \$71 | \$77 | Car | \$75 | \$84 |
| New England | \$83 | \$71 | RV | \$58 | \$70 |

*Adjusted for inflation (12.3%)



Travel Agent/Company Prepaid Expenses

The Visitor Exit Survey included a series of questions regarding prepaid travel expenses. Please note that prepaid travel costs, where applicable, were incorporated into calculations of overall trip expenditures. More specifically, a portion of the amount prepaid to a travel agent was added to the amount spent in Nova Scotia over and above that included in the travel package. The methodology for calculating the portion of prepaid expenses to add to overall expenditures was as follows:

1. Convert amount of prepaid travel expenses to \$Cdn including taxes (if necessary);
2. Remove margin that goes directly to the travel agent (11%);
3. Determine the amount of the prepaid travel expenses attributable to Nova Scotia (if package covered nights in other places);
4. Allocate the prepaid amount attributable to Nova Scotia across applicable expenditure categories in the same proportion as similar visitors who DID NOT have prepaid travel expenses.

Prepaying a portion of travel expenses was not a common practice among visitors. Only 6 percent claimed they paid a portion of their trip expenses prior to arriving in the province. There is one notable difference between market regions; overseas visitors (24%) were substantially more likely to prepay a portion of their trip expenses compared with visitors from other market regions. (Table D12)

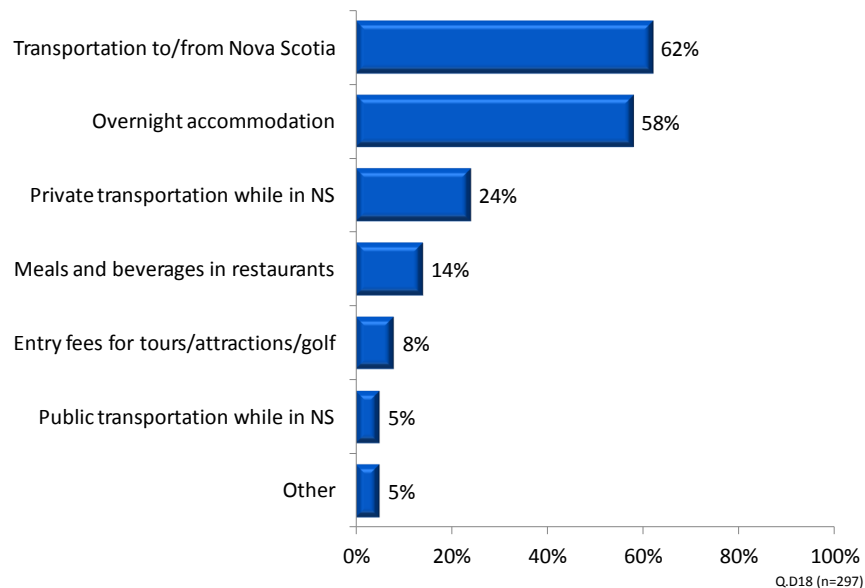


Travel Package Characteristics

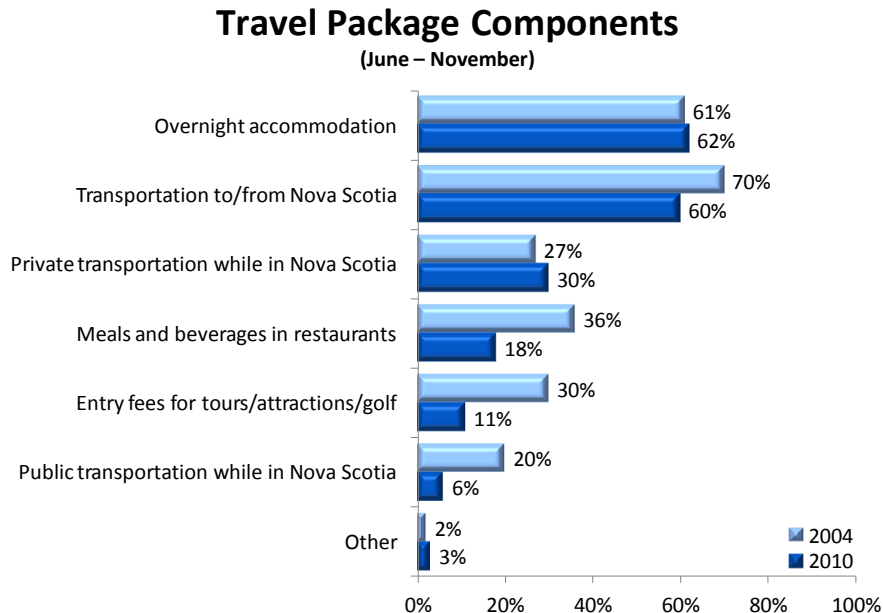
Among travellers who prepaid at least a portion of their travel expenses, eight in ten (83%) said their expenses covered only Nova Scotia travel expenses. Among visitors whose prepaid travel expenses included accommodations in Nova Scotia, an average of 3.6 nights in Nova Scotia was covered by the travel package. Among those with accommodations outside of Nova Scotia included in their package, a slightly higher number (5.8 average) of nights in other destinations was covered. (Tables D16, D17, D19)

Transportation to and from Nova Scotia and overnight accommodations were the most popular travel package components. Other travel expenses such as private transportation while in the province, meals and beverages in restaurants, entry fees for attractions and events, and public transportation within the province were much less likely to be included as part of a prepaid travel package. (Table D18)

Travel Package Components



Comparing 2010 and 2004, visitors who purchased a travel package were less likely to indicate their package included transportation to or from Nova Scotia.



Accommodations

The following table illustrates the percentage of all parties visiting Nova Scotia in 2010 who stayed at least one night in each of the accommodations listed, as well as the average number of nights spent in each type of accommodation (among those who stayed at each accommodation type). (Table D25)

| Type of Accommodation* | Overall | Business | Pleasure | Visit Friends/ Relatives |
|------------------------|---------|----------|----------|--------------------------|
| Hotel | | | | |
| % Visited | 46% | 82% | 54% | 21% |
| # Nights | 2.5 | 2.6 | 2.6 | 2.2 |
| Friends/Relatives | | | | |
| % Visited | 43% | 10% | 20% | 81% |
| # Nights | 5.4 | 4.0 | 4.8 | 5.6 |
| Motel | | | | |
| % Visited | 9% | 5% | 16% | 5% |
| # Nights | 2.4 | 2.4 | 2.4 | 2.4 |
| Bed & Breakfast | | | | |
| % Visited | 6% | 2% | 12% | 2% |
| # Nights | 3.0 | 2.3 | 3.2 | 2.5 |
| Other Fixed Roof | | | | |
| % Visited | 15% | 7% | 27% | 10% |
| # Nights | 6.2 | 4.7 | 7.1 | 4.7 |
| Campgrounds | | | | |
| % Visited | 6% | <1% | 14% | 2% |
| # Nights | 5.2 | 4.2 | 5.6 | 3.0 |

*Note: Percentages do not add up to 100% as visitors were not limited to a single type of accommodation.

As indicated in the above table, visitors mainly stayed in hotels or homes of friends or relatives during their visit to Nova Scotia, although the average number of nights spent in hotels was considerably less than the length of time spent at the homes of friends or relatives. Business travellers were far more likely to have stayed in a hotel as opposed to staying with friends or relatives (or other types of accommodation). Those travelling for pleasure stayed in a variety of accommodation types, most notably hotels, motels, and other fixed-roof accommodations.

Staying with family and friends was most common among visitors from Ontario, Western Canada, Atlantic Canada and overseas. Examining mode of travel, it is perhaps not surprising that RV travellers were far more likely than other visitors to use commercial campgrounds or trailer parks (80%) and national or provincial park campgrounds (29%). Car and air travellers were largely split between staying in hotels or with friends and relatives. Visitors to the province spent the largest number of nights when staying at a private cottage or vacation home (15.5). No more than an average of 5.4 nights was spent at other types of accommodations. (Table D25)



In 2010, visitors were more likely to stay with friends or relatives or other fixed-roof accommodations.
(Table D25)

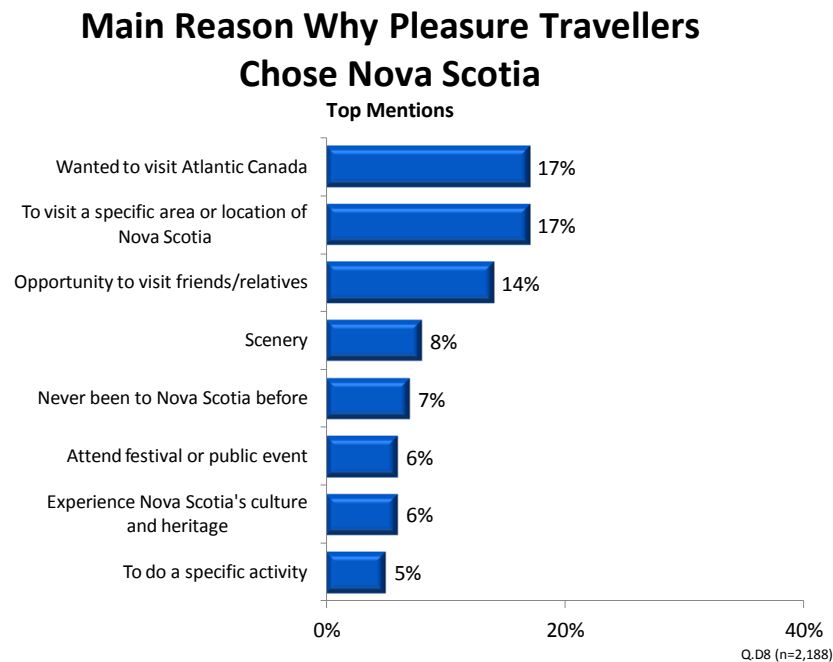
| Type of Accommodation | Overall | | Business | | Pleasure | | Visit Friends/Relatives | |
|-----------------------|---------|------------|----------|------------|----------|------------|-------------------------|------------|
| | 2004 | 2010 | 2004 | 2010 | 2004 | 2010 | 2004 | 2010 |
| Friends/Relatives | | | | | | | | |
| % Visited | 36% | 43% | 11% | 10% | 20% | 19% | 75% | 80% |
| #Nights | 7.3 | 5.8 | 4.0 | 4.6 | 4.9 | 5.1 | 8.9 | 6.1 |
| Hotel | | | | | | | | |
| % Visited | 40% | 43% | 67% | 83% | 45% | 50% | 20% | 22% |
| #Nights | 2.9 | 2.7 | 3.5 | 2.7 | 2.9 | 2.9 | 2.5 | 2.1 |
| Motel | | | | | | | | |
| % Visited | 17% | 11% | 11% | 5% | 23% | 18% | 7% | 6% |
| #Nights | 2.7 | 2.5 | 2.4 | 2.2 | 2.7 | 2.5 | 3.1 | 2.5 |
| Bed & Breakfast | | | | | | | | |
| % Visited | 11% | 8% | 5% | 3% | 17% | 15% | 5% | 3% |
| #Nights | 3.3 | 3.1 | 2.7 | 2.7 | 3.6 | 3.2 | 2.6 | 2.7 |
| Other Fixed Roof | | | | | | | | |
| % Visited | 14% | 20% | 3% | 8% | 23% | 32% | 6% | 14% |
| #Nights | 7.2 | 6.6 | 9.3 | 7.1 | 6.4 | 7.2 | 6.5 | 5.0 |
| Campgrounds | | | | | | | | |
| % Visited | 8% | 9% | 1% | 1% | 14% | 18% | 2% | 3% |
| #Nights | 5.3 | 5.3 | 7.0 | 3.7 | 5.4 | 5.7 | 5.2 | 2.9 |



Pleasure Travellers

Motivations for Pleasure Travellers

Among all travel parties visiting Nova Scotia, 34 percent indicated they were travelling to the province for pleasure. Those travelling for pleasure offered three main reasons for choosing Nova Scotia as their destination: they wanted to visit Atlantic Canada, they wanted to visit a specific area or location in Nova Scotia or it was an opportunity to visit friends or relatives. (Table D8)



Overseas visitors (49%) and Western Canadian visitors (40%) were considerably more likely than others to state they decided to visit Nova Scotia because they wanted to visit Atlantic Canada.

Among those who indicated they wanted to visit a specific location or area within Nova Scotia, the most popular destinations were Halifax (31%), Cape Breton (22%), the Cabot Trail (14%), and the South Shore (12%).

Five percent indicated they wanted to visit a specific festival or event. Of these, concert/music festival (33%), the Royal Nova Scotia International Tattoo (10%), the Fleet Review/Navy Centennial (10%), and the Tim Horton's Curling Brier (9%) were the most commonly mentioned events.

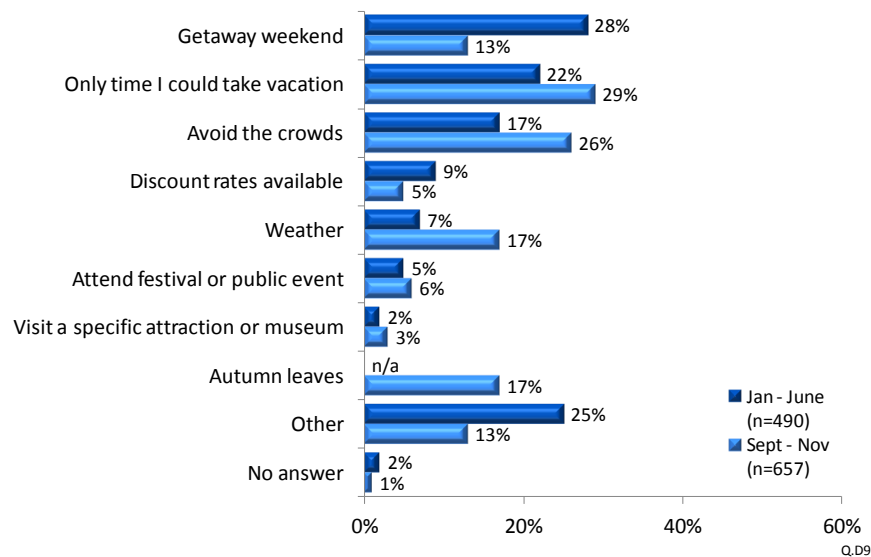
Four percent of visitors travelling for pleasure mentioned they came to visit a specific attraction. Of these, Pier 21 (16%), the Cabot Trail (10%), and Louisbourg (10%) were the most often identified attractions. (Table D8)



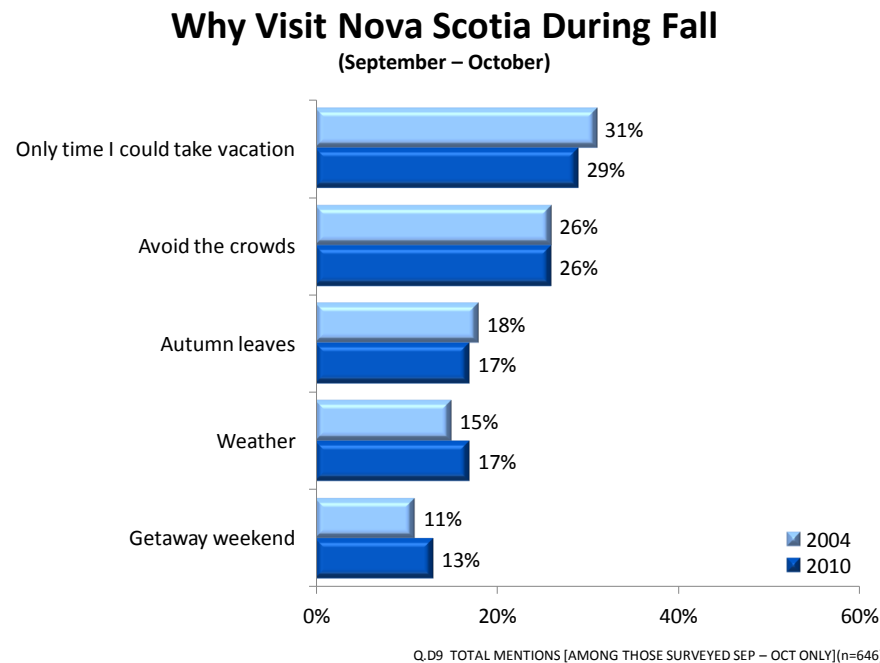
Non-Summer Visitors

Pleasure visitors who came to the province in the fall (September to November) or winter/spring (January to June) were asked their reasons for visiting during this time of year. For both time periods, many indicated that it was the only time they could take a vacation. Avoiding crowds was also a motivating factor for both time periods. **Getaway vacations was an important factor for visitors in the January to June period, but less so for fall visitors.** Fall visitors were also motivated by the opportunity to view autumn leaves. (Table D9)

Why Visit Nova Scotia During Fall or Winter/Spring



Reasons for visiting Nova Scotia in the fall were generally consistent when comparing 2010 and 2004 with the exception of weather, which was cited more frequently in 2010. (Table D9)



Atlantic Canadians were more likely to visit Nova Scotia in the fall (32%) or winter/spring (41%) for a weekend getaway, compared with other visitors. (Table D9)



Participation in Activities

Four in ten visitors (39%) participated in outdoor activities during their 2010 trip to Nova Scotia. Visitors from Atlantic Canada (28%) were considerably less likely than visitors from elsewhere to have participated in outdoor activities. As might be expected, those visiting Nova Scotia on business were less likely to participate in outdoor activities (15%). (Table N1)

The most popular outdoor activities included coastal sightseeing, hiking, beach exploring, outdoor swimming/sunbathing, nature observing, outdoor sporting events and whale watching. (Table N2)

| Participation in Activities (Among All Visitors, % Saying Yes) Top Mentions* | | | | | | | | | |
|---|-----------|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| | Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| Coastal sightseeing | 17 | 8 | 20 | 24 | 27 | 32 | 38 | 35 | 31 |
| Hiking (in wooded or coastal areas) | 16 | 7 | 21 | 21 | 22 | 33 | 34 | 35 | 33 |
| Beach exploring | 16 | 7 | 22 | 24 | 26 | 29 | 29 | 22 | 25 |
| Outdoor swimming/sunbathing (Mar-Nov) | 12 | 7 | 13 | 17 | 16 | 18 | 13 | 9 | 19 |
| Nature observing | 11 | 5 | 12 | 14 | 15 | 21 | 25 | 26 | 20 |
| Outdoor sporting event | 4 | 3 | 7 | 5 | 6 | 4 | 7 | 5 | 4 |
| Whale watching | 4 | 1 | 4 | 8 | 6 | 5 | 8 | 11 | 20 |

*Note: Comparisons to 2004 are not possible due to improvements made to activity categories in 2010.



In terms of visitation to specific places or events, the Halifax waterfront was the most popular place, with two in every five visitors visiting the Halifax waterfront. Other popular places to visit included craft shops, nightclubs/lounges/pubs and museums/historic sites. At least one in ten visitors reported they or someone in their party visited local farms or producers, a nature park or geology site, a live musical performance, an art gallery or studio, or a casino. (Table N3)

| Places or Events Visited (% Saying Yes) Top Mentions | | | | | | | | | |
|---|-----------|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| | Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| Halifax waterfront | 42 | 29 | 51 | 52 | 64 | 39 | 53 | 59 | 62 |
| Craft shops/studios | 29 | 17 | 34 | 37 | 47 | 38 | 39 | 44 | 53 |
| Nightclubs/Lounges/Pubs | 26 | 22 | 26 | 29 | 39 | 26 | 21 | 26 | 29 |
| Museums/Historic sites | 25 | 10 | 33 | 33 | 50 | 37 | 45 | 52 | 47 |
| Visit local farms and/or local food producers | 14 | 9 | 13 | 16 | 24 | 19 | 16 | 20 | 24 |
| Live music performances | 13 | 10 | 10 | 15 | 18 | 20 | 14 | 21 | 23 |
| Visit a nature park or fossil/geology site | 13 | 5 | 15 | 17 | 20 | 23 | 27 | 34 | 33 |
| Art galleries/Fine art studios | 10 | 4 | 10 | 13 | 20 | 16 | 12 | 22 | 29 |
| Casino | 10 | 11 | 8 | 10 | 10 | 6 | 8 | 9 | 5 |

Note: Comparisons to 2004 are not possible due to improvements made to activity categories in 2010.

Of note, visitors from Atlantic Canada were less likely than others to report visiting most of the locations or events (notable exceptions included nightclubs/lounges/pubs and a casino).

Those travelling to Nova Scotia for pleasure were more likely than other travellers to visit various places and events.



Previous Trips to Nova Scotia

Close to nine in ten (87%) visitors had travelled to Nova Scotia prior to their current trip. Those least likely to have visited Nova Scotia before included visitors from Mid-Atlantic and Other US. (Table T12)

| Previously Visited the Province % Saying Yes | | | | | | | | |
|---|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| 87 | 98 | 71 | 82 | 69 | 75 | 49 | 46 | 64 |

Pleasure visitors (76%) were less likely than those travelling for business (91%) or VFR (94%) to have visited the province before. In terms of mode of travel, automobile visitors (91%) were more likely to have visited the province in the past compared with air (79%) and RV (69%) visitors.

Visitors in 2010 were considerably more likely than those who visited in 2004 to report this was not their first trip to Nova Scotia. This increase was particularly evident among visitors from Atlantic Canada, New England and overseas.

| Previously Visited the Province % Saying Yes (June – November) | | | | | | | | | | | | | | | | | |
|--|----|------------|----|----------|----|-----------|----|------------------|----|---------------|----|----------------|----|------------|----|------------|----|
| Overall % | | Atlantic % | | Quebec % | | Ontario % | | Western Canada % | | New England % | | Mid-Atlantic % | | Other US % | | Overseas % | |
| 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 |
| 69 | 83 | 82 | 98 | 58 | 66 | 75 | 80 | 67 | 66 | 53 | 73 | 37 | 45 | 34 | 43 | 40 | 62 |

The majority of those who visited Nova Scotia before had travelled to the province in the past two years (41% in 2010, 34% in 2009). (Table T13)

Only a very small proportion (1%) of previous visitors had visited Nova Scotia as part of a cruise. For one-third (32%) of these visitors, their cruise was their first visit to Nova Scotia. (Tables T14 and T15)



Evaluation of Nova Scotia as a Destination

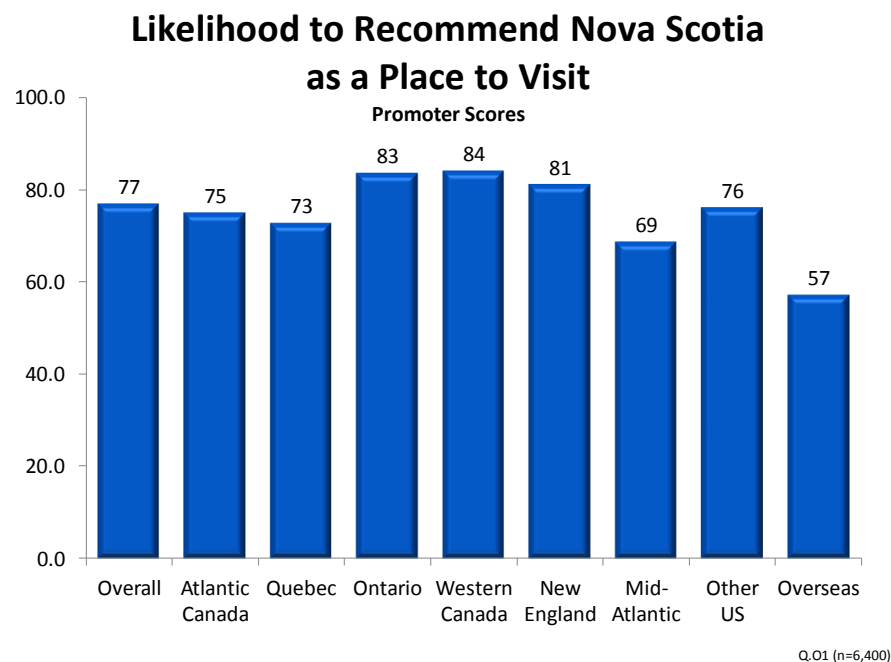
Visitors were asked several questions that evaluated their overall Nova Scotia experience.

Likelihood of Recommending

Visitors indicated a high likelihood of recommending Nova Scotia to friends and family as a place to visit. The overall average was 9.3 (on a scale of 1 to 10 where 1 was 'definitely would not recommend' and 10 was 'definitely would recommend'). Likelihood of recommending was slightly lower among overseas visitors (average=8.8), compared with other visitors. (Table O1)

Promoter

In order to better understand the significance of visitors' likelihood to recommend Nova Scotia as a place to visit, a Promoter score was developed. The Promoter score reflects the net difference between the percentage of "promoters" (those rating 9 or 10 on the 10-point recommend scale) and "detractors" (those rating between 1 and 6). The Promoter score for Nova Scotia was extremely positive (i.e. there were substantially more "promoters" than "detractors"). There were some variations across market regions, with overseas visitors having the lowest Promoter scores. (Table O1)



Of note, business travellers (score=64.9) and RV travellers (score=63.4) offered lower Promoter scores compared with other visitors. (Table O1)



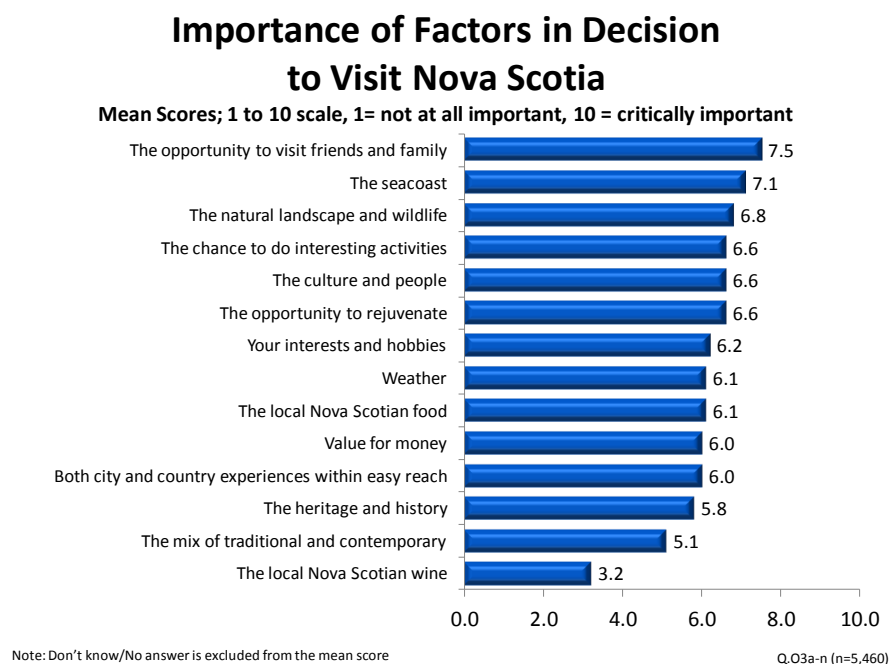
Overall Satisfaction

Satisfaction with the most recent trip to Nova Scotia was high with an average satisfaction level of 9.2 (on a scale of 1 to 10 where 1 was 'completely dissatisfied' and 10 was 'completely satisfied').

Satisfaction levels were high across markets, transportation methods and trip purpose. (Table O2)

Importance of Factors in Decision to Visit

Visitors were asked to rate the importance of fourteen factors in their decision to visit Nova Scotia for this trip using a scale of 1 to 10 where 1 was 'not at all important' and 10 was 'critically important.' The factor that received the highest average ranking was the opportunity to visit friends and family followed closely by the seacoast. (Table O3a-O3n)



Examining ratings of importance by market, notable differences were observed. The opportunity to visit family and friends was more important to Atlantic Canada, Ontario, Western Canada and overseas visitors than it was to visitors from Quebec or the US. Atlantic Canada visitors tended to place less importance on a number of factors including the seacoast, natural landscape and wildlife, the mix of traditional and contemporary, the heritage and history, and the culture and people.

Those visiting for pleasure tended to place more importance across the range of factors, with the exception of visiting family and friends and local Nova Scotian wine. Those visiting by RV placed more emphasis than those visiting by other means on certain factors, most notably, weather, heritage and history, natural landscape and wildlife, and seacoast. RV visitors placed notably less emphasis on visiting family and friends.



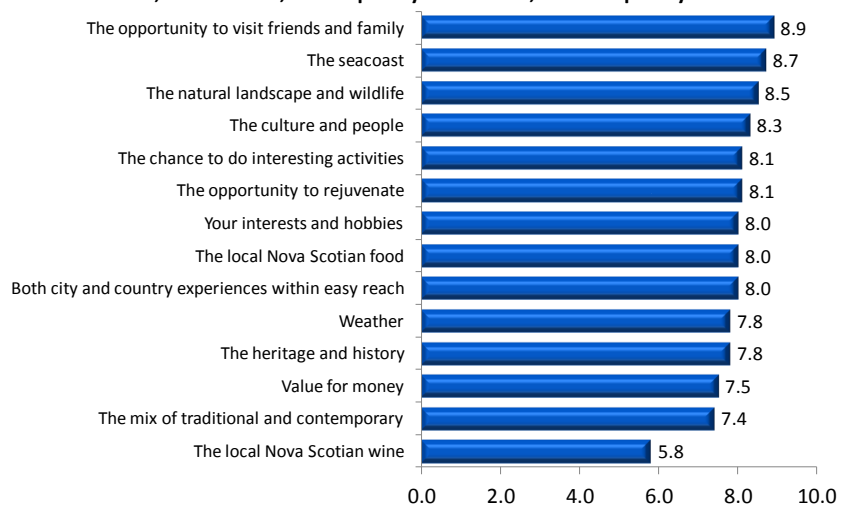
Satisfaction with Aspects of Visit

Visitors were asked to indicate their level of satisfaction with various aspects of their trip. They did so using a scale of 1 to 10 where 1 was 'completely dissatisfied' and 10 was 'completely satisfied'. (Table O4a-O4n)

Satisfaction was high across most aspects with nine of the fourteen areas receiving an average satisfaction score of 8.0 or higher. Notably, ratings for opportunity to visit friends and family; and seacoast received the most favourable assessments with average ratings of 8.9 and 8.7 respectively.

Satisfaction with Aspects of Trip to Nova Scotia

Mean Scores; 1 to 10 scale, 1= completely dissatisfied, 10 = completely satisfied



Note: Don't know/No answer is excluded from the mean score

Q.O4a-n (n=5,460)

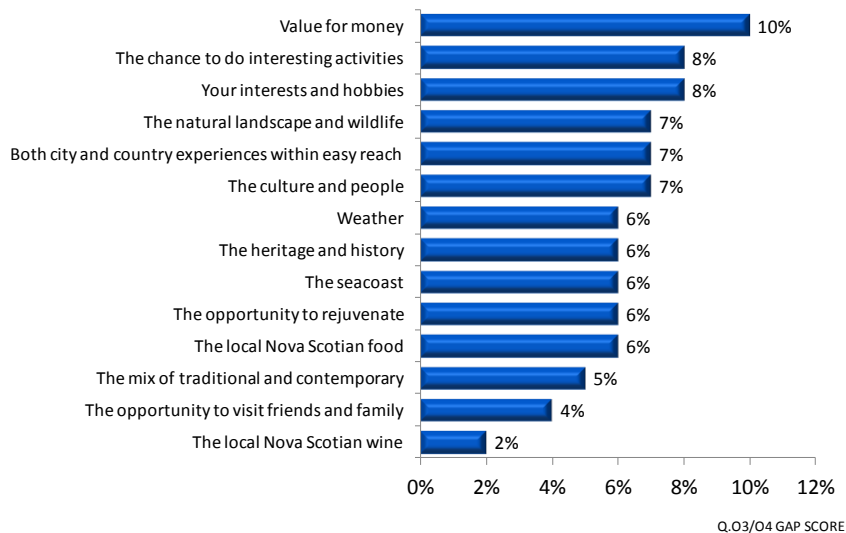


Gap Analysis

Gap analysis illustrates the gaps between the visitor experience and visitor expectation, highlighting areas that may require attention. Gap scores were calculated as the percentage of visitors who rated a factor as critically important for deciding to visit, but were less than completely satisfied with that aspect of their visit to Nova Scotia. For purposes of calculating the gap scores, ratings of 9 and 10 were considered to define 'critically important' and 'complete satisfaction'. This gap analysis included only those who provided a definite response for both importance and satisfaction. As illustrated in the following table, the gap scores obtained were very low (all at or below 10 percent). This indicates the visitors' needs were largely met for the factors evaluated and no area is identified as requiring action to improve visitor satisfaction. (Table O4a-O4n)

Gap Scores for Aspects of Trip to Nova Scotia

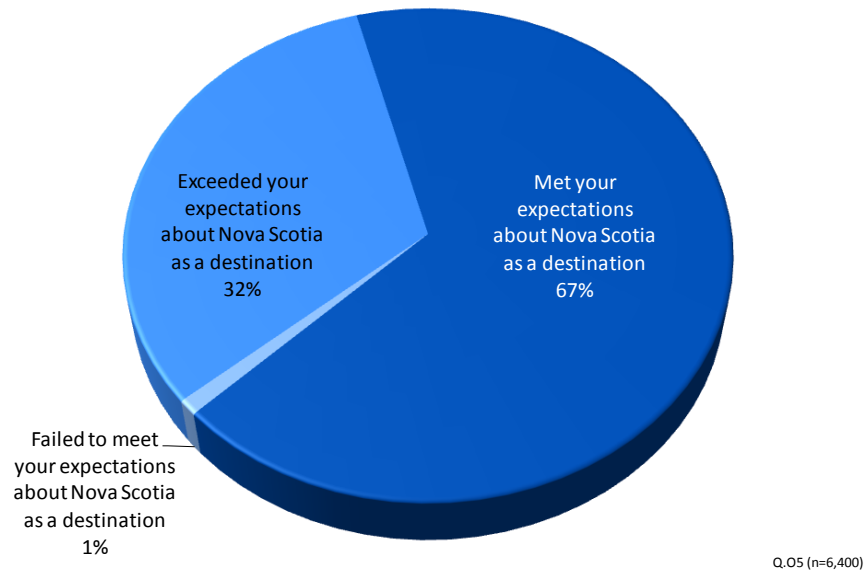
Gap Score: % rating 9 or 10 in O3, and 8 or less in O4



Meeting Expectations

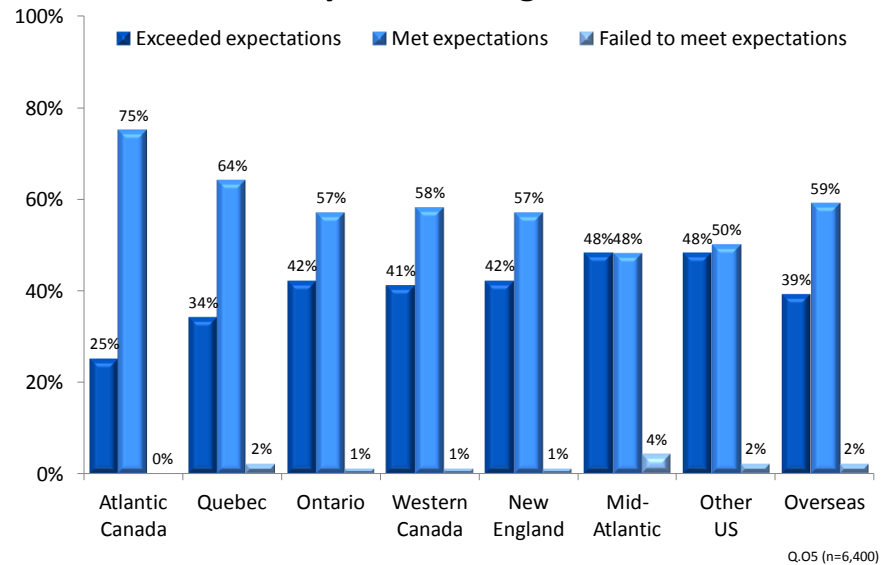
Nearly all visitors to Nova Scotia indicated their trip met or exceeded their expectations, and virtually no one said their Nova Scotia trip failed to meet their expectations. Visitors from Atlantic Canada (75%) were more inclined to say their Nova Scotia experience met their expectations (rather than exceeded), compared with visitors from elsewhere. Pleasure and VFR travelers (37% and 33%, respectively) were more likely than business travelers (22%) to indicate their Nova Scotia trip exceeded their expectations. (Table O5)

Nova Scotia Trip Compared with Expectations



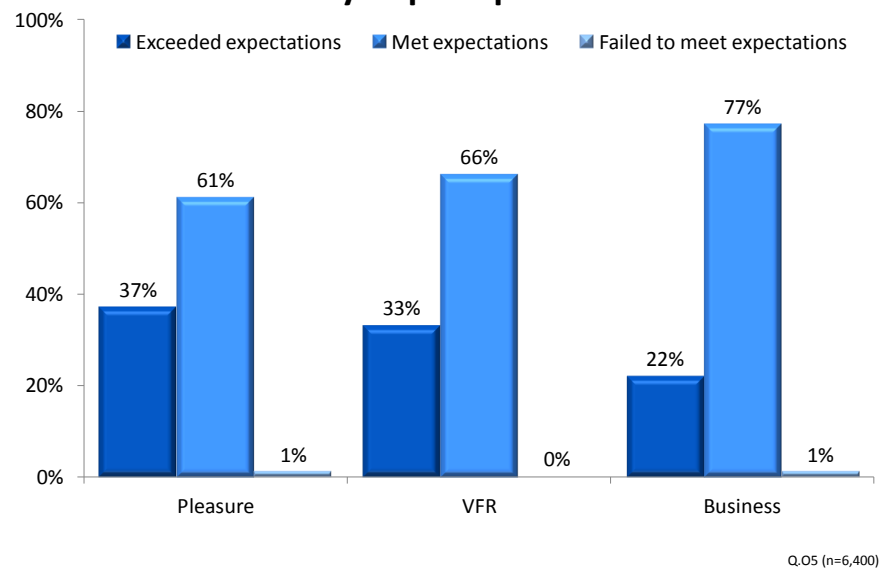
American and overseas visitors were more likely than Canadian visitors to indicate their Nova Scotia trip exceeded their expectations. (Table O5)

Nova Scotia Trip Compared with Expectations by Market Region



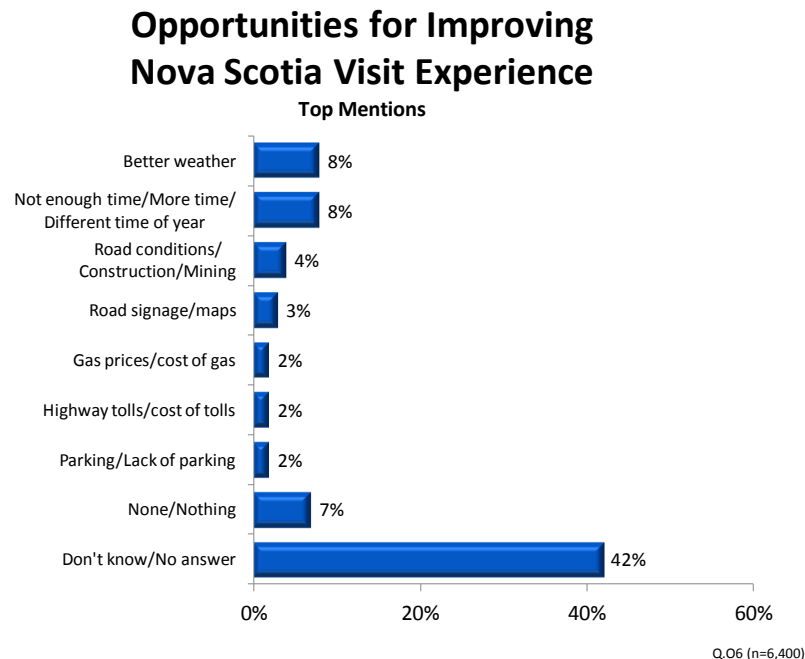
Pleasure and VFR visitors were more likely than those travelling on business to state their Nova Scotia trip exceeded their expectations. (Table O5)

Nova Scotia Trip Compared with Expectations by Trip Purpose



Areas for Improvement

The following table illustrates visitors' perceptions of opportunities for improving their visit experience to Nova Scotia. Half the visitors could not provide a definite suggestion (i.e., they indicated nothing or don't know). Among suggestions for improvement, the two most frequently mentioned opportunity areas: better weather and the desire to spend more time in the province/visit at a different time of year are not readily influenced by the tourism industry in Nova Scotia. Few visitors offered any other suggestions for improvement such as road conditions, road signs/maps, gasoline prices, highway tolls and parking. (Table O6)



Those travelling by RV were considerably more likely to identify road conditions (16%) as an opportunity area for improvement compared with those travelling by other modes. (Table O6)

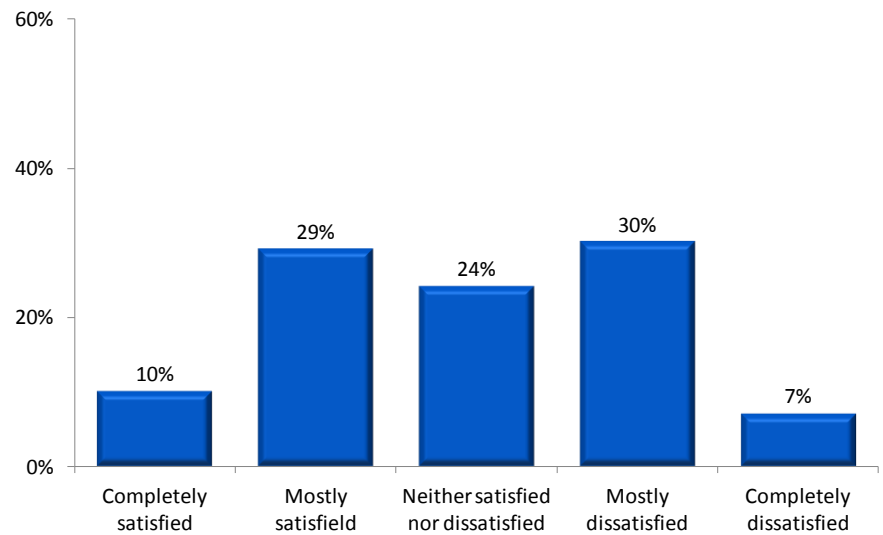


French Language Needs

Visitors who responded in French were asked to assess French services in Nova Scotia. French language visitors were split in terms of satisfaction with the French services offered in Nova Scotia. Four in ten were satisfied, but a similar proportion was dissatisfied. (Table W1)

Satisfaction with French Services in Nova Scotia

Among French Language Visitors



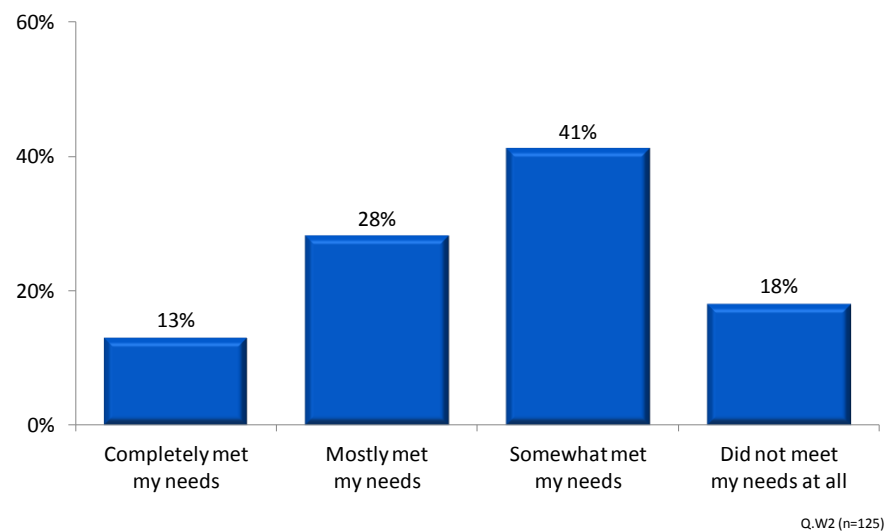
Q.W1 (n=125)



French language visitors were also of different opinions in terms of the extent to which French language services in Nova Scotia met their needs. Among those who indicated French language services only somewhat or did not meet their needs, the primary reason was the lack of services in French or a scarcity of French-speaking people in the province. (Tables W2 and W3)

Extent to Which French Services in Nova Scotia Met Needs

Among French Language Visitors



Trip Planning

Prior to Arriving in Nova Scotia

The following table illustrates the percentage of visitors who participated in specific pre-trip planning activities. Among the activities evaluated, gathering information about Nova Scotia via browsing the Internet without requesting print materials was most popular, with almost one-half of visitors engaging in this activity. One in four visitors consulted Nova Scotia's tourism website, www.novascotia.com.

Generally speaking, pre-trip planning resources were more likely to be used by residents outside of Atlantic Canada, especially those who live furthest away. (Table T1)

| Participation in Activities Prior to Trip To Nova Scotia | | | | | | | | | |
|--|-----------|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| | Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| Browsed the Internet to find information about Nova Scotia without requesting printed materials. | 47 | 38 | 51 | 50 | 57 | 60 | 68 | 66 | 61 |
| Requested printed Nova Scotia tourism information through www.novascotia.com | 27 | 13 | 39 | 31 | 30 | 24 | 45 | 39 | 33 |
| Consulted Nova Scotia's tourism website, www.novascotia.com | 25 | 15 | 32 | 31 | 37 | 36 | 42 | 47 | 45 |
| Saw other Nova Scotia advertising material | 18 | 16 | 19 | 21 | 21 | 21 | 24 | 20 | 19 |
| Requested printed Nova Scotia tourism information by calling Nova Scotia's 1-800 number | 5 | 2 | 8 | 8 | 8 | 9 | 16 | 16 | 3 |
| Contacted a travel agent to request information or book a package tour | 3 | 1 | 4 | 4 | 8 | 6 | 7 | 7 | 10 |
| Booked a package tour over the Internet | 3 | 3 | 5 | 3 | 3 | 3 | 9 | 2 | 6 |
| Attended a travel show | 1 | 1 | 1 | 0 | 0 | 0 | 1 | 1 | 2 |



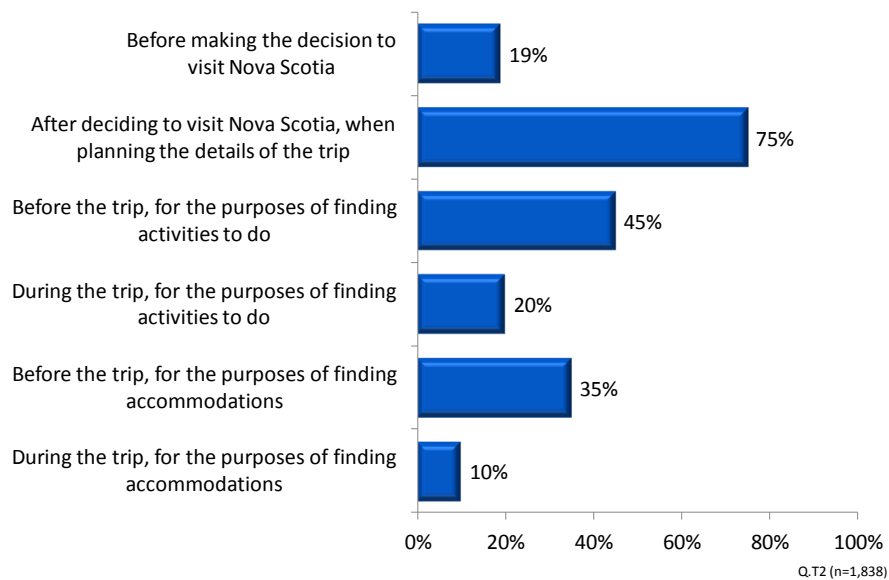
Among visitors who consulted www.novascotia.com, most visited the website after deciding to visit Nova Scotia when planning the details of their trip. Two in ten visited the site before making their decision to visit Nova Scotia. Visiting the site prior to making the decision to visit Nova Scotia was notably more common among US Mid-Atlantic residents (49%) than other visitors.

| Participation in Activities Prior to Trip to Nova Scotia (June – November) | | | | | | | | | | | | | | | | | | |
|---|-----------|----|------------|----|----------|----|-----------|----|------------------|----|---------------|----|----------------|----|------------|----|------------|----|
| | Overall % | | Atlantic % | | Quebec % | | Ontario % | | Western Canada % | | New England % | | Mid-Atlantic % | | Other US % | | Overseas % | |
| | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 |
| Browse the Internet to find information about Nova Scotia without requesting printed materials. | 24 | 52 | 21 | 42 | 28 | 60 | 25 | 56 | 20 | 61 | 36 | 65 | 32 | 68 | 32 | 71 | 30 | 64 |
| Request printed Nova Scotia tourism information by calling Nova Scotia's 1-800 number. | 13 | 8 | 7 | 3 | 18 | 11 | 18 | 11 | 12 | 9 | 24 | 11 | 19 | 21 | 21 | 19 | 6 | 2 |
| Request printed Nova Scotia tourism information through the novascotia.com website. | 9 | 11 | 2 | 4 | 9 | 18 | 12 | 15 | 13 | 14 | 18 | 14 | 26 | 26 | 21 | 22 | 16 | 19 |
| Contact a travel agent to request information or book a package tour. | 4 | 4 | 0 | 1 | 3 | 5 | 5 | 4 | 5 | 10 | 5 | 6 | 8 | 10 | 14 | 8 | 11 | 11 |
| Book a package tour over the Internet. | 1 | 4 | 0 | 3 | 1 | 8 | 1 | 3 | 1 | 4 | 4 | 2 | 8 | 7 | 5 | 3 | 3 | 5 |
| Attend a travel show. | 1 | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 0 | 1 | 0 | 1 | 2 | 1 | 1 | 1 | 2 |



Many visitors used www.novascotia.com before their trip to find activities to do or to find accommodations. Although less common, some visitors used the site for these purposes during their trip. (Table T2)

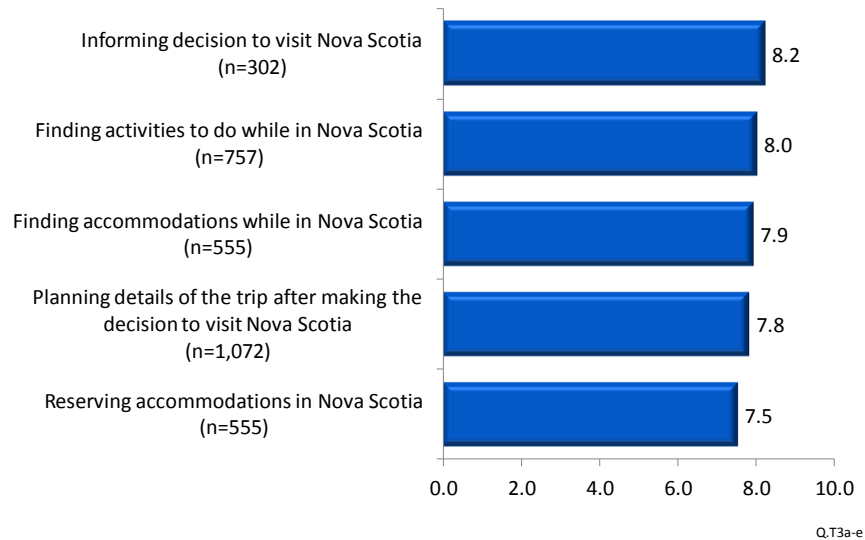
When www.novascotia.com Was Used Among Those Using the Website



Visitors who had used www.novascotia.com for selected purposes were asked to evaluate its usefulness using a scale of 1 to 10 where 1 was 'not at all useful' and 10 was 'extremely useful'. Visitors' assessment of the usefulness of www.novascotia.com for trip planning was generally positive. Visitors were least likely to offer a favourable assessment with respect to usefulness in reserving accommodations in Nova Scotia. (Tables T3a-e)

Usefulness of www.novascotia.com

Among Those Using the Website
Mean Scores; Scale 1 – 10, 1 = not at all useful, 10 = extremely useful



In most cases, the person interviewed was involved in the decision to visit Nova Scotia. Only one-quarter (22%) indicated they were not responsible for this decision. Business travellers were considerably more likely (59%) to indicate they were not responsible for the decision compared with pleasure (14%) or VFR travellers (16%). (Table T4aa)



Visitors were asked to indicate how influential various resources were when making their original decision to travel to Nova Scotia before planning of the trip details had begun. They were asked to rate various sources using a scale of 1 to 10 where 1 was 'not at all influential' and 10 was 'extremely influential'. A wide range of factors influenced visitors' decision to visits, consistent with the variety of resources used in trip planning. Average ratings indicate that recommendations from family or friends was the most influential with an average rating of 6.0. All other factors received ratings between 1 and 4, reflecting the varied media options visitors use to inform their travel decisions.

(Tables T4a-o)

| Influence of Resources in Decision to Travel to Nova Scotia Among Those Responsible for Decision | |
|---|-----|
| Mean Scores; Scale 1 – 10, 1 = not at all influential, 10 = extremely influential | |
| Recommendations from friends or family | 6.0 |
| Printed NS Tourism materials such as the Doers & Dreamers guide | 3.2 |
| The www.novascotia.com website | 3.1 |
| Television, newspaper or magazine advertising | 2.7 |
| Online Nova Scotia tourism advertising | 2.5 |
| Online travel sites such as Expedia.com or Trip Advisor | 2.2 |
| Tourism Operator Websites | 2.0 |
| Online testimonials or blogs | 1.9 |
| Nova Scotia tourism 1-800 number | 1.8 |
| Social Networking Sites such as Facebook or Twitter | 1.7 |
| Email advertising | 1.7 |
| Travel Agent | 1.5 |
| Tourism tradeshow event or booth in your hometown | 1.5 |
| Other (21% offered a response for "Other") | 8.5 |

Visitors from US Mid-Atlantic (average=4.4), other US (excluding New England) (average=3.8), and Quebec (average=3.6) were more likely than others to indicate the www.novascotia.com website was influential. Visitors from US Mid-Atlantic (average=3.9) and other US (excluding New England) (average=3.8), also gave higher average influence ratings to printed Nova Scotia tourism materials. Pleasure visitors also gave higher average ratings to the website (average=3.9) and printed materials (average=4.0), compared with other visitors. Likewise, those travelling by RV gave higher ratings to www.novascotia.com (average=4.1) and printed materials (average=4.9).

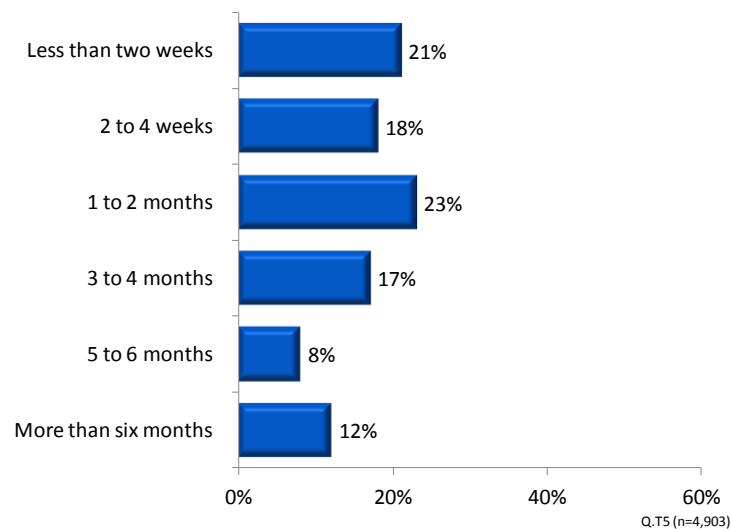


Timing

The length of time between making the decision to visit Nova Scotia and the departure date varied, as demonstrated in the figure below. (Table T5)

How Far in Advance Decision Made to Visit Nova Scotia

Among Those Responsible for Decision



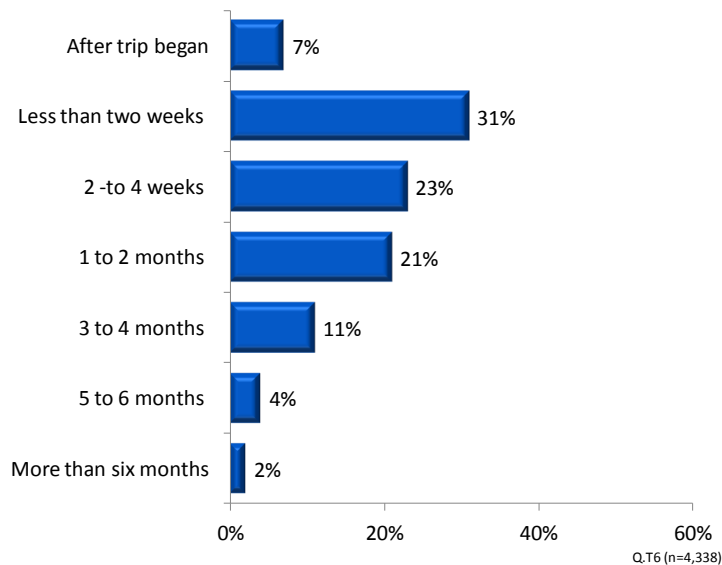
Visitors from Western Canada and overseas made their decision to visit Nova Scotia the farthest in advance. Specifically, 43 percent of Western Canadian visitors and 49 percent of overseas visitors made the decision at least five months prior to departure. Atlantic Canadians were most inclined to make the decision closer to departure with 59 percent making the decision within the four weeks prior to departure. Those travelling by car were most inclined to make the decision closer to departure (48% made their decision in the four weeks prior to departure), while RV travellers were most inclined to make the decision far in advance (40% made their decision at least 5 months prior to departure).



The timing of the first booking related to the Nova Scotia trip (including accommodations, transportation, or activities) also varied, although most initial bookings were made sometime in the preceding two months. (Table T6)

How Far in Advance First Booking Made

Among Those Responsible for Decision



Atlantic Canadians were most likely to make their initial booking closer to the time of departure (44% made their first booking within the two weeks prior to departure).

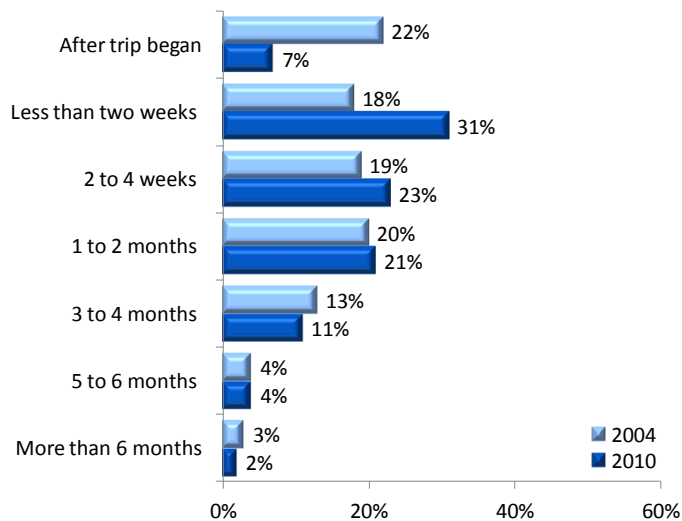
RV travellers (24%) were more inclined than others to make the initial booking after their trip had begun. Business travellers (43%) were more likely than other visitors to make their first booking within the two weeks prior to departure. (Table T6)



Comparing 2010 and 2004, visitors were more likely to make their first booking before the trip began.

How Far in Advance First Booking Made

Among Those Responsible for Decision
(June – November)

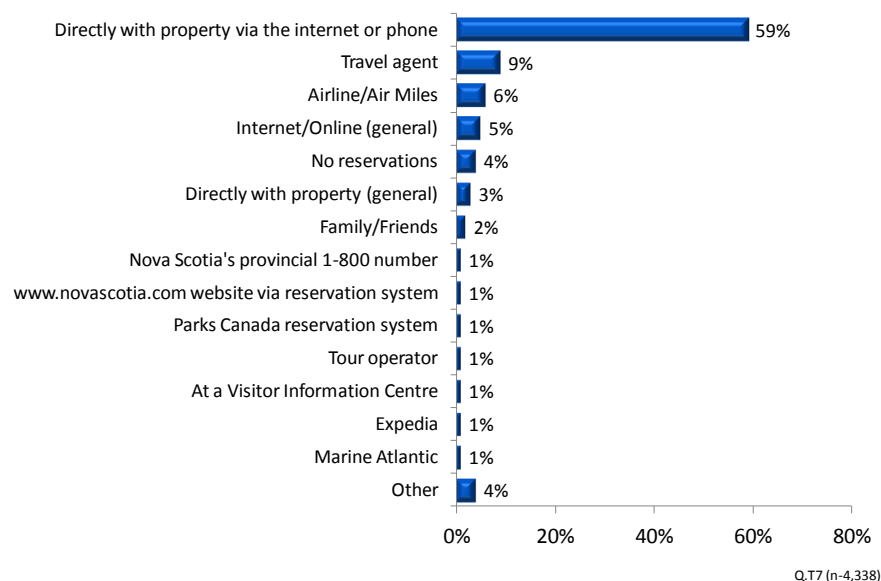


Mode of First Reservation

Most visitors made their first reservation directly with the property via Internet or telephone. While approximately one in ten overall used a travel agent, overseas visitors (33%) were more inclined than other visitors to do so. Air travellers (17%) and business travellers (19%) were more likely than other visitors to use a travel agent. (Table T7)

How First Reservation Was Made

Among Those Making Bookings



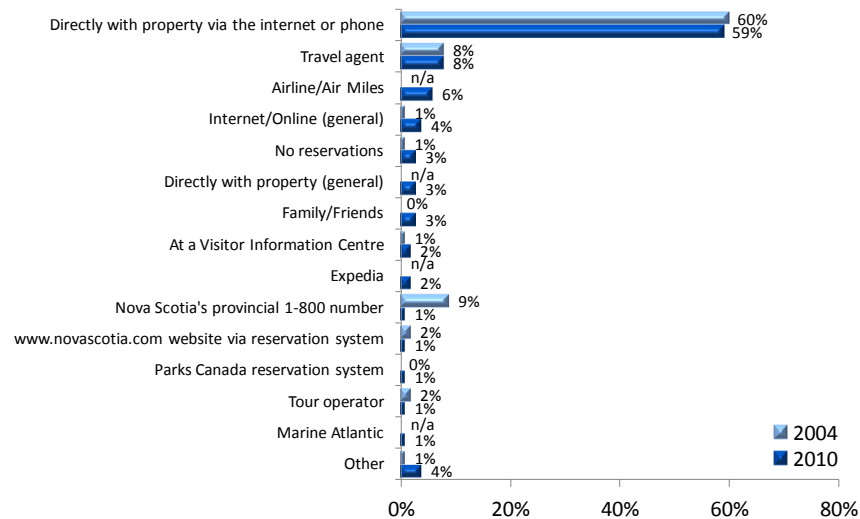
Q.T7 (n=4,338)



In 2010, visitors were less likely to report using Nova Scotia's 1-800 number to make their first reservation. (Table T7)

How First Reservation Was Made

Among Those Making Bookings
(June – November)



Electronic Devices

A majority (61%) of travellers used a personal electronic device as a tool for finding information about Nova Scotia during their trip. Close to four in ten used a laptop computer, while three in ten used a global positioning system (GPS). Two in ten used a smartphone. There was moderate variation in use of electronic devices across market regions. (Table T8)

| Use of Personal Electronic Devices for Finding Information About Nova Scotia | | | | | | | | | |
|--|-----------|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| | Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| Did not use any of these devices | 39 | 44 | 28 | 34 | 30 | 40 | 31 | 34 | 35 |
| Personal laptop computer | 37 | 30 | 47 | 42 | 48 | 39 | 46 | 52 | 53 |
| A global positioning system (GPS) device | 31 | 29 | 39 | 35 | 31 | 33 | 35 | 33 | 18 |
| Smartphone (e.g. Blackberry or iPhone) or Personal Digital Assistant or PD (e.g. Palm Pilot) | 22 | 18 | 28 | 26 | 27 | 15 | 27 | 22 | 21 |

RV travellers were the most inclined to use a personal laptop computer (59%) or a GPS (68%). Pleasure visitors (38%) were more inclined than others (VFR 27%, business 26%) to use a GPS.



Visitor Information Centres

Overall, one-quarter of visitors stopped at a Visitor Information Centre (VIC) at some point during their trip to obtain information about Nova Scotia with RV travellers (70%), pleasure travellers (43%), and US (48%) and overseas (49%) visitors most likely to have done so.

Less than two in ten travellers reported stopping at a (VIC) to get information about Nova Scotia when they first entered the province. A similar number of visitors stopped at a VIC while travelling throughout the province. Atlantic Canadian visitors were least likely to use VICs. US, Quebec and overseas travellers were most likely to visit a VIC when entering the province, while those from overseas, the US or Western Canada were most likely to do so when travelling around the province.

| Visited Visitor Information Centre (% Saying Yes) | | | | | | | | | |
|--|-----------|------------|----------|-----------|------------------|---------------|----------------|------------|------------|
| | Overall % | Atlantic % | Quebec % | Ontario % | Western Canada % | New England % | Mid-Atlantic % | Other US % | Overseas % |
| At any point during your trip to Nova Scotia | 24 | 10 | 33 | 32 | 38 | 49 | 44 | 49 | 49 |
| When you first entered Nova Scotia | 16 | 7 | 28 | 21 | 21 | 38 | 29 | 36 | 28 |
| While travelling throughout the province | 15 | 5 | 19 | 20 | 31 | 30 | 32 | 35 | 41 |

The majority (59%) of RV visitors made a visit to a VIC when they first entered the province. By contrast, auto travellers (15%) and air travellers (14%) were much less likely to have visited a VIC when they first arrived in Nova Scotia. Likewise, many (46%) RV visitors visited a VIC when travelling throughout the province compared with only a few auto (12%) travellers or air (18%) travellers.

Those who stopped at a VIC while travelling in Nova Scotia made an average of 2.6 visits. Visitors from Atlantic Canada made fewer visits to VICs than visitors from outside Atlantic Canada. (Tables T9 and T9ct)

Visitors who stopped at a VIC were asked whether their visit to the VIC had an impact on their activities while in Nova Scotia. A majority (61%) of VIC visitors felt they learned about an event, activity or area of the province they did not know about before. Indeed, one-third of visitors (34%) stated they took part in an activity or event as a result of their trip to the VIC and three in ten (31%) stated they visited a part of the province they would not have gone to otherwise. Four percent of visitors who stopped at a VIC extended their stay in Nova Scotia as a result.

Overseas (88%), US outside of New England and Mid-Atlantic (71%), and Western Canada (70%) visitors were most likely to indicate they learned something as a result of their VIC visit. Air travellers (71%) were also most likely among visitors to indicate this was the case. (Table T10)

VIC visitation was lower in 2010 compared with 2004. (Table T10)



| Visited VIC/Tourist Bureau % Saying Yes (June – November) | | | | | | | | | | | | | | | | | | |
|---|-----------|----|------------|----|----------|----|-----------|----|------------------|----|---------------|----|----------------|----|------------|----|------------|----|
| | Overall % | | Atlantic % | | Quebec % | | Ontario % | | Western Canada % | | New England % | | Mid-Atlantic % | | Other US % | | Overseas % | |
| | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 | 04 | 10 |
| At any point during your trip to Nova Scotia | 40 | 33 | 33 | 16 | 46 | 43 | 41 | 41 | 35 | 43 | 59 | 60 | 58 | 53 | 59 | 55 | 45 | 60 |
| When you first entered Nova Scotia | 25 | 22 | 18 | 10 | 34 | 36 | 28 | 27 | 17 | 24 | 43 | 46 | 42 | 35 | 39 | 40 | 28 | 33 |
| While travelling throughout the province | 30 | 23 | 24 | 8 | 31 | 25 | 30 | 27 | 31 | 37 | 40 | 39 | 49 | 40 | 48 | 39 | 38 | 51 |

Among those who extended their stay as a result of visiting a VIC, the average visitor stayed an additional 2.0 nights. (Tables T10, T10at)

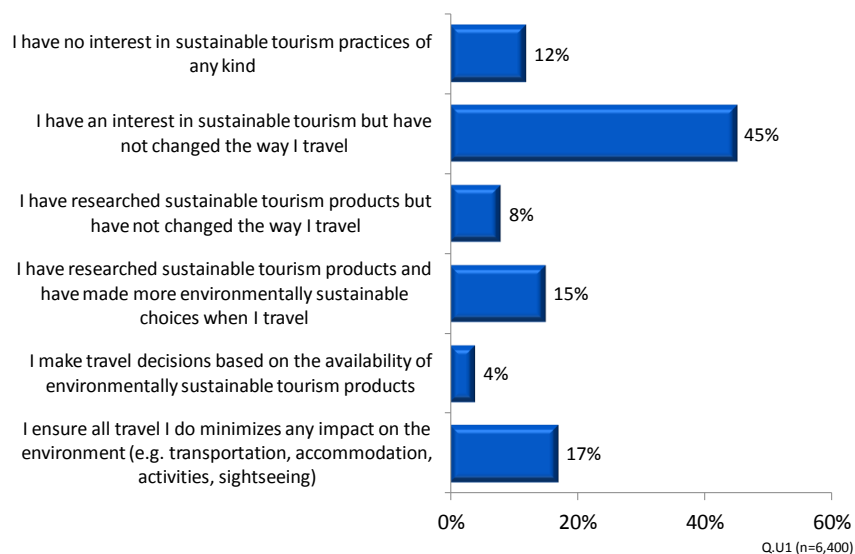
Comparing 2010 and 2004, there was no change in the average number of nights by which visitors extended their Nova Scotia visit as a result of visiting a VIC (2.0 nights in both years).



Environmental Sustainability

Visitors were asked to indicate which of several environmental sustainability statements best describes them. The most commonly selected statement was 'I have an interest in sustainable tourism but have not yet changed the way I travel.' Otherwise, responses varied from doing research in sustainable tourism to ensuring all travel minimizes environmental impact. Only a small percentage indicated they have no interest in sustainable tourism practices. It is interesting to note that Quebec travellers (27%) were most likely to indicate that they ensure all their travel minimizes impact on the environment. (Table U1)

Which Environmental Sustainability Statement Best Describes You?



Only a very small proportion of visitors (3%) have ever purchased carbon offset credits. (Table U2)

One-third of those who have demonstrated some action pertaining to sustainable tourism indicated they would be willing to pay a premium for tourism sustainable products. One-quarter (24%) affirmed they would not be willing to pay while 42 percent did not know. Overseas visitors (50%) were most likely to be willing to do so. (Table U3)



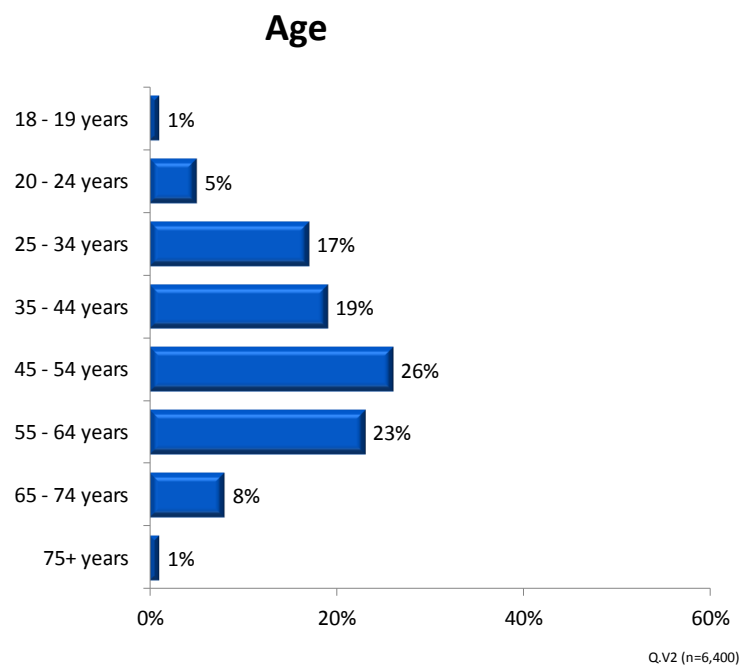
Visitor Characteristics

This section moves away from party information and focuses on the individual visitor to Nova Scotia. This section examines visitor demographics, participation in activities, and repeat visits to the province among visitors.

Demographics

Age

The following graph illustrates the age distribution of respondents. Close to one-third were 55 years of age or older. (Table V2)

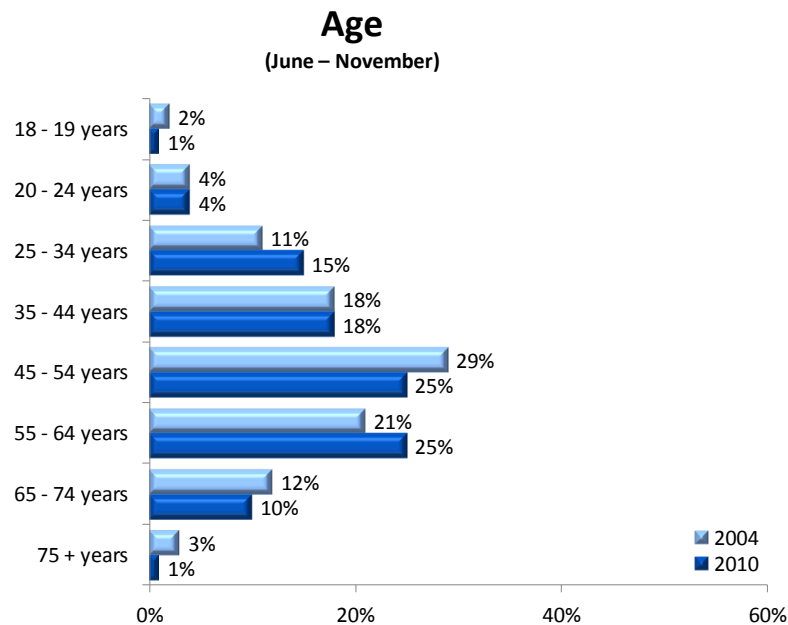


A closer look at mode of travel reveals that RV visitors (65%) had an older age profile and were much more likely than automobile (31%) or air (32%) visitors to be 55 years of age or older.

Visitors from the United States tended to have an older age profile compared with visitors from other markets.

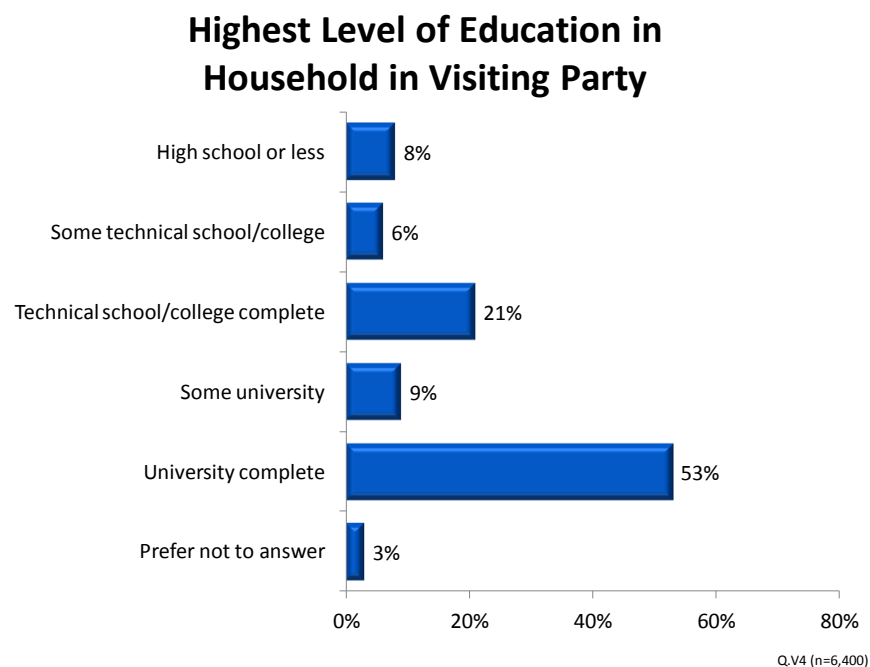


In 2010, visitors were more likely to be between 55 and 64 years of age and less likely to be between 45 and 54 years. (Table V2)



Education

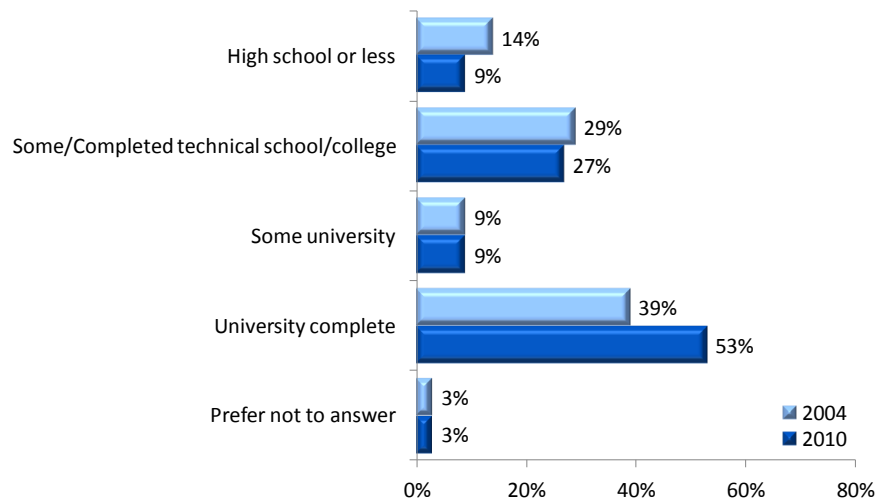
Overall, most visitors to Nova Scotia had someone in their home with a university degree. Among the market regions there were some notable differences. Visitors from the US (74%), as well as international visitors (75%), were most likely to report someone in their household has a university degree. (Table V4)



Comparing 2010 and 2004, visitors in 2010 were considerably more likely to have completed university. (Table V4)

Highest Level of Education in Household in Visiting Party

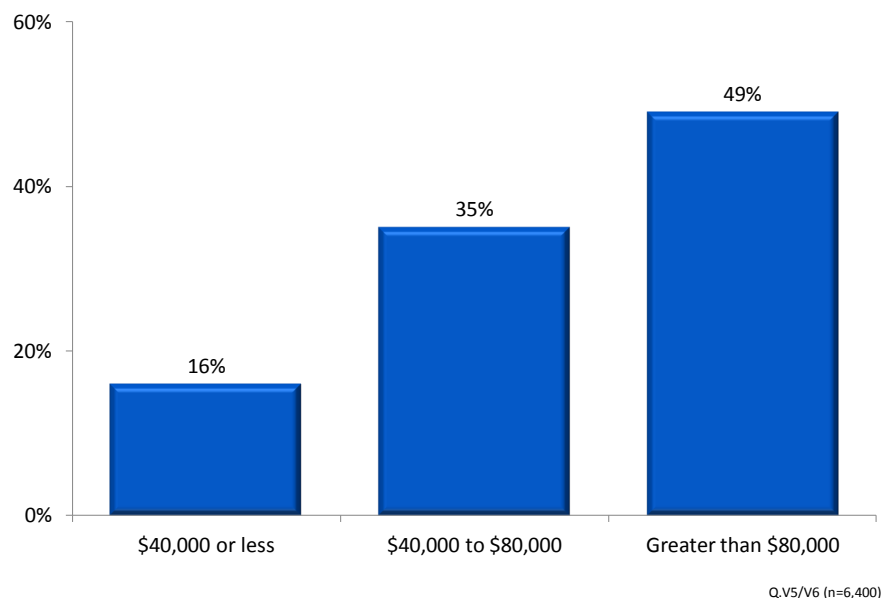
(June – November)



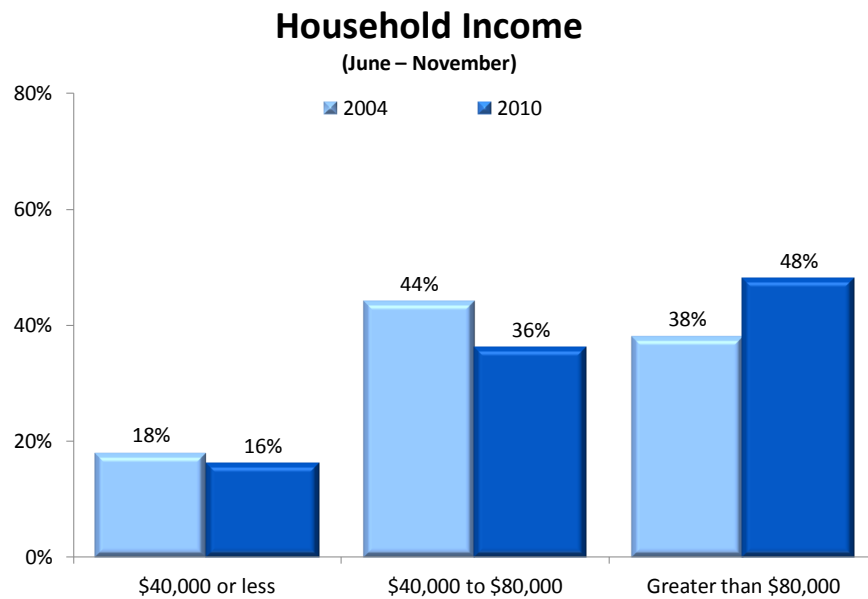
Household Income

The majority of visitors reported household incomes of more than \$40,000 with approximately one-half reporting household incomes of more than \$80,000. Business travellers (65%) were more likely to have household incomes in excess of \$80,000 compared with those visiting friends or relatives (43%) or travelling for pleasure (48%). (Table V5/V6)

Household Income



2010 visitors were more likely than those who visited Nova Scotia in 2004 to report household incomes in excess of \$80,000. (Table V5/V6)



Language Preference

The vast majority (94%) of visitors preferred to be served in English when visiting Nova Scotia. Not surprisingly, a greater proportion of visitors from Quebec (39%) indicated a preference to be served in French.

Five percent of visitors in 2010 indicated their preferred language was French compared with 3 percent in 2004. (Table T11)

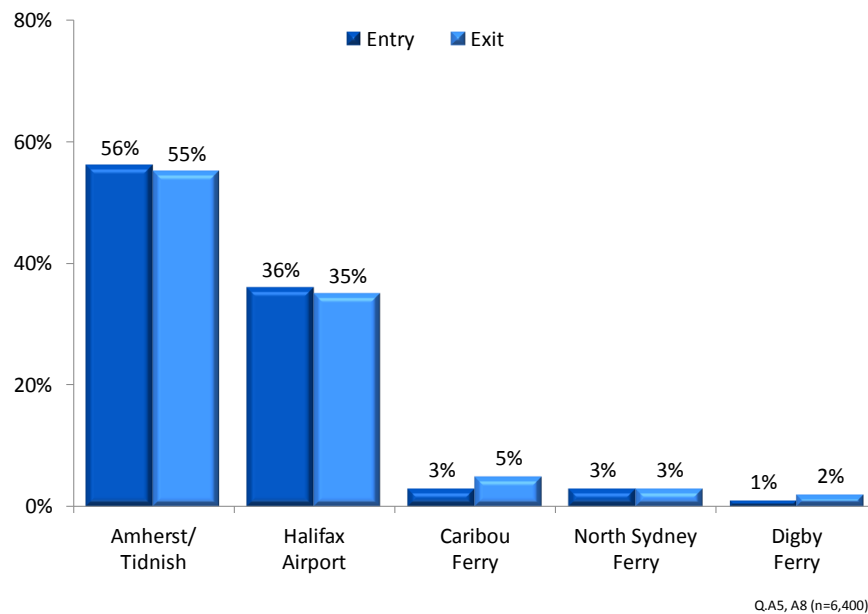


Respondent Profile

Entry/Exit

More than one-half of survey respondents arrived in Nova Scotia via New Brunswick, while over one-third arrived via the Halifax Stanfield International Airport. Exit patterns were virtually the same. (Tables A5 and A8)

Entry and Exit Points During Trip to Nova Scotia



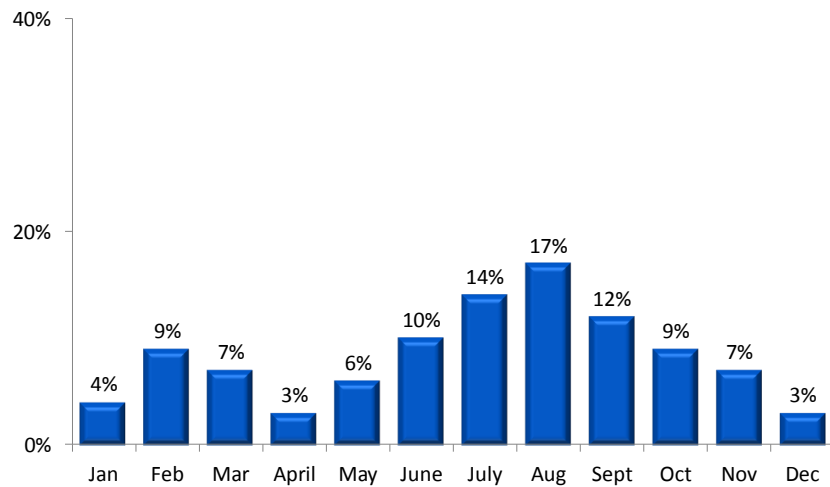
Three in ten survey respondents indicated they exited and re-entered Nova Scotia during their trip. This practice was most common among overseas (45%) and Western Canada (42%) visitors as well as RV travellers (40%). (Table A6)



Time of Visit

While visits to Nova Scotia were spread throughout the year, over one-half of survey respondents visited the province between June and September. Business travelers and those from Atlantic Canada were less likely than other survey respondents to have their travel to Nova Scotia concentrated in this four-month period. (Table A7)

Date of Departure from Nova Scotia



Q.A7 (n=6,400)



Survey Methodology

Data for the 2010 Visitor Exit Survey were collected from January 20, 2010 to January 11, 2011. Visitors exiting the province via Highway 104 (Cobequid Pass), Halifax Stanfield International Airport, Digby ferry, Pictou ferry or North Sydney ferry were provided a Survey Response Card (SRC). An SRC distribution schedule was developed that took into account the traffic expected at each exit point. The SRC contained important information about the Visitor Exit Survey and invited recipients to complete the survey online at www.exitns.ca or to call a toll-free number to complete a telephone interview. The vast majority of interviews were self completed online.

Regardless of completion mode (telephone interview or self-complete), all survey data was collected in a single-data file.

All data were subjected to a cleaning process to ensure the responses given were consistent with the survey design. Where appropriate, missing responses were replaced with known values (e.g., \$0 for categories with no expenditures) or “don’t know.” Also, for open-ended questions and questions with “other” responses, verbatim responses were coded into response categories, where possible.

When calculating trip expenditures transportation to and from Nova Scotia and major expenditures were excluded. The 2004 expenditures were adjusted for inflation (12.3%) using the Nova Scotia CPI index provided by Statistics Canada.

The following table shows the distribution of the 6,400 completed interviews by mode of travel, entry point, region of residence and type of interview.

| Factor | Completed Interviews (#) | Completed Interviews (%) |
|----------------------|--------------------------|--------------------------|
| Mode of Travel | | |
| Automobile | 4,646 | 73% |
| RV | 154 | 2% |
| Airplane | 1,600 | 25% |
| Exit Point | | |
| Amherst | 4,019 | 63% |
| Pictou | 482 | 8% |
| North Sydney | 116 | 2% |
| Digby | 183 | 3% |
| Halifax Int. Airport | 1,600 | 25% |
| Market Region | | |
| Atlantic Canada | 2,608 | 41% |
| Quebec | 361 | 6% |
| Ontario | 1,722 | 27% |



| Factor | Completed Interviews (#) | Completed Interviews (%) |
|---------------------------|--------------------------|--------------------------|
| Market Region (continued) | | |
| Western Canada | 424 | 7% |
| New England | 447 | 7% |
| Mid-Atlantic | 202 | 3% |
| Other US | 517 | 8% |
| Overseas | 119 | 2% |
| Survey Type | | |
| Phone | 420 | 7% |
| Internet | 5,980 | 93% |

Weighting

Data were weighted by market region (from residence of visitor: Atlantic Canada, Other Canada, United States, and Overseas), mode of travel (car, RV, air), and entry/exit point (Amherst, Pictou ferry, Digby ferry, North Sydney ferry, Halifax Stanfield International Airport). For road visitors, weights were developed based on the point of entry whereas weights for air visitors were based on the point of exit (i.e., the airport). It should be noted, however, that any visitors who entered via the airport and left via road (i.e., flew in and drove out) were counted as air visitors for purposes of weighting. Separate weights were established for questions referring to parties ("party weights") and questions referring to individuals ("person weights"). Information regarding the number of overnight visitors to Nova Scotia during the survey period was provided by the Department with this information being utilized to calculate the person weights based on a cell-weighting procedure. Party weights were calculated by dividing the person weights by the average party size (by mode of travel) as determined from the weighted results from the current 2010 VES.

