

2015 NOVA SCOTIA VISITOR EXIT SURVEY

Overall Results



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INTRODUCTION

This report presents the results of the 2015 Nova Scotia Visitor Exit Survey (VES) as prepared by research staff at Tourism Nova Scotia. The 2015 Nova Scotia Visitor Exit Survey had three primary objectives:

1. To develop key tourism statistics used to calculate industry activity.
2. To provide trip and visitor profile information, including data related to visitors' trip purpose, activities participated in while visiting the province, and satisfaction with the overall Nova Scotia trip experience; and
3. To leverage Tourism Nova Scotia's licensing of Explorer Quotient, Destination Canada's market segmentation tool, by providing a portrait of visitors based on their travel values.

The 2015 Visitor Exit Survey report is based on 4,230 questionnaires that were completed by overnight visitors aged 18 years or older who stayed at least one night in Nova Scotia between May 2015 and May 2016.

Questionnaires were completed using an online survey. Visitors exiting the province through the Halifax Stanfield International Airport, North Sydney, Digby, Caribou, Yarmouth, or Highway 104 (Cobequid Pass) received a VES Response Card. The Survey Response Card invited non-resident visitors who had spent at least one night in Nova Scotia to complete the VES online.

Data were weighted by origin and mode of travel to reflect the overall non-resident overnight visitor population.

Comparative data from the 2010 VES are presented where applicable.

Explorer Quotient profiles will be included in a separate report.

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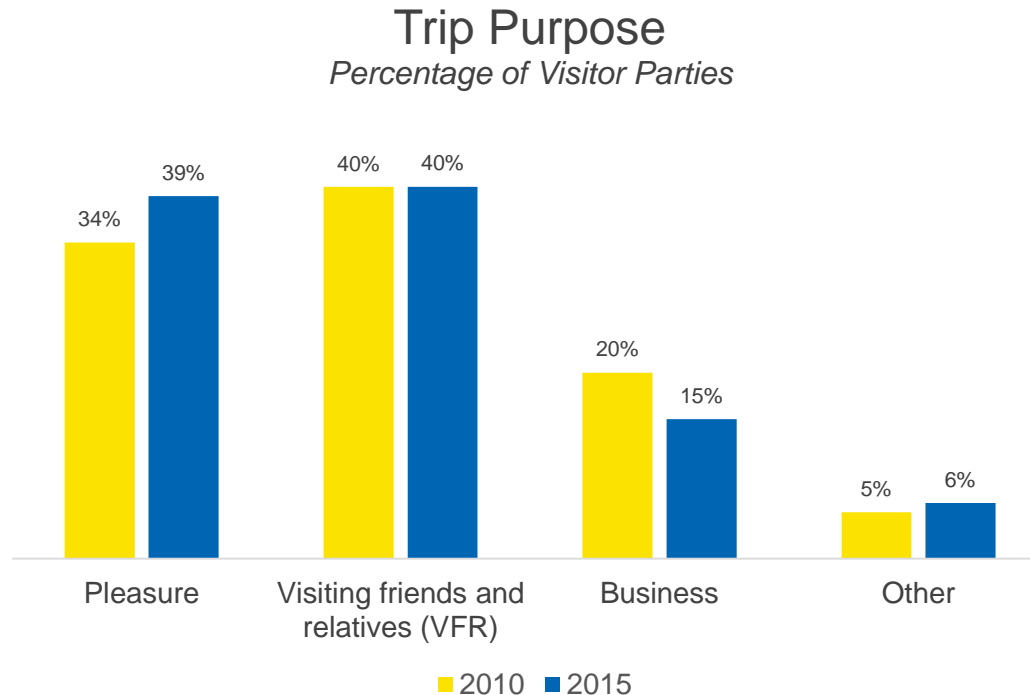
VISITOR PROFILE

Trip and Party Characteristics



TRIP CHARACTERISTICS

Compared with 2010, pleasure visitor parties comprised a larger percentage of the visitor population in 2015. There was a corresponding decline in the percentage of visitor parties travelling to Nova Scotia for business.



Source: Table D3

TRIP CHARACTERISTICS

In comparison to 2010, there was an increase in the proportion of pleasure visitor parties from all markets, with the exception of Mid-Atlantic US, and Atlantic Canada, which were virtually unchanged from 2010. The largest increases in pleasure visitor parties were from the Overseas, Other US and New England markets. The decline in business travel was evident across all markets.

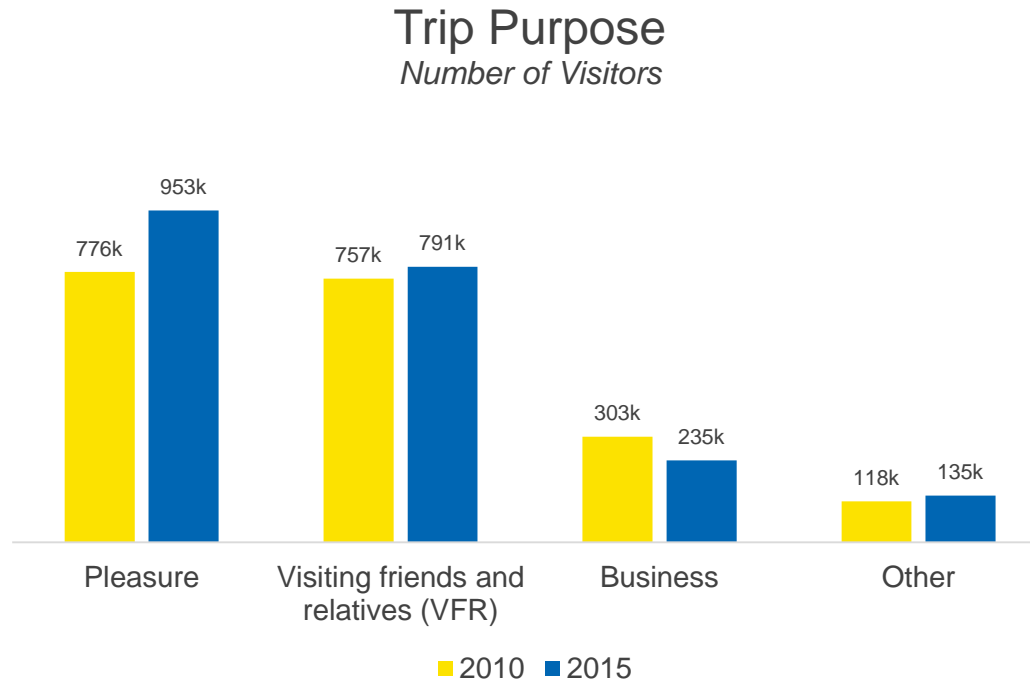
Trip Purpose by Market Region						
	Pleasure		VFR*		Business	
	2010	2015	2010	2015	2010	2015
Atlantic Canada	31%	32%	39%	40%	23%	18%
Quebec	35%	44%	33%	36%	30%	20%
Ontario	31%	38%	48%	48%	18%	13%
Western Canada	36%	39%	45%	45%	17%	14%
New England	50%	66%	37%	26%	10%	6%
Mid-Atlantic US	58%	58%	21%	32%	18%	9%
Other US	55%	72%	25%	21%	19%	6%
Overseas	38%	56%	45%	36%	13%	7%
Total	34%	39%	40%	40%	20%	15%

Source: 2010 VES, 2015 VES

* Visit friends and relatives

TRIP CHARACTERISTICS

Compared with 2010, Nova Scotia attracted more pleasure visitors in 2015. There was minimal change in the number of visitors whose trip purpose was to visit friends or relatives, while the number of business visitors declined.



Source: Table D3

TRIP CHARACTERISTICS

Pleasure Travel Defined

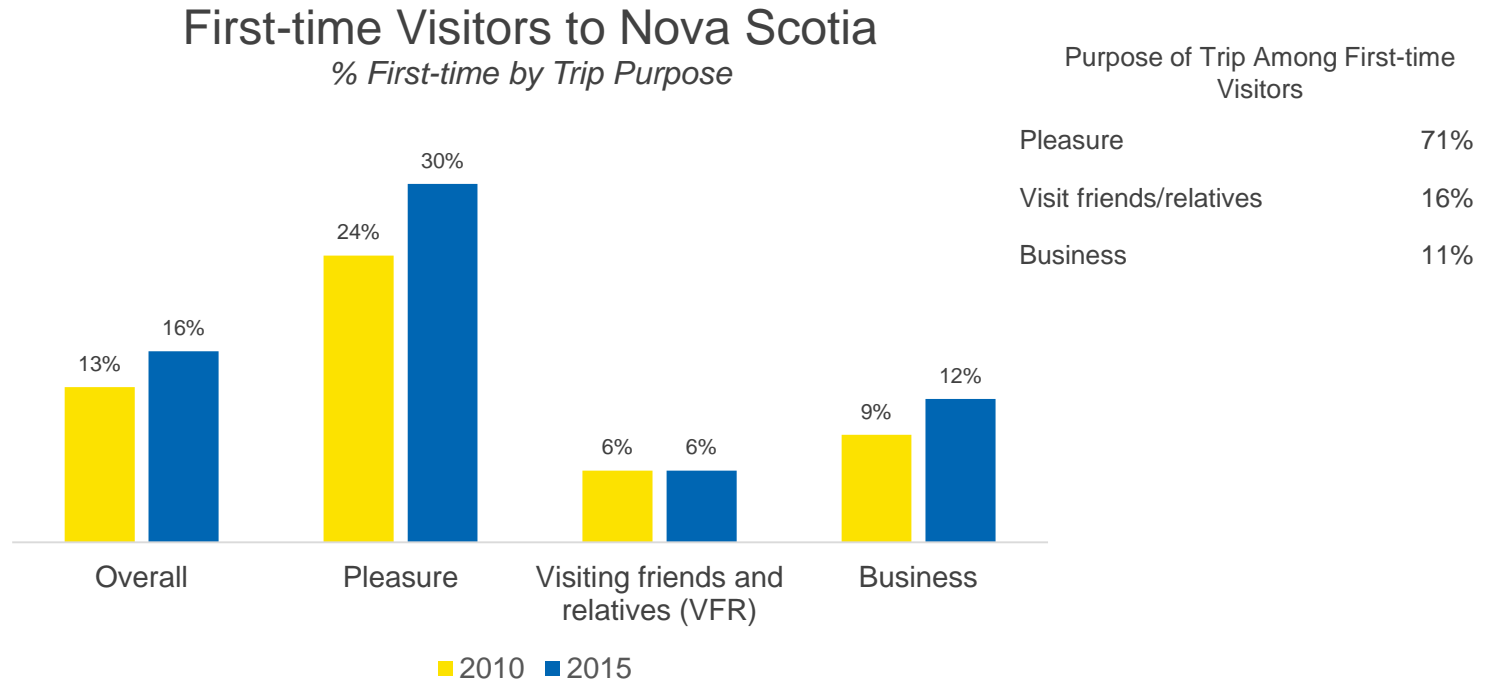
Among those travelling for the purpose of visiting friends and relatives in Nova Scotia, approximately one-half were spending their entire trip with friends or family (51%), while close to one-half were both visiting family and friends and visiting Nova Scotia for pleasure (46%).

Because visitors who combine visiting friends and relatives with pleasure travel tend to behave like those whose primary trip purpose is pleasure travel, a 'net pleasure' category was created which combines these groups. The remaining visiting friends and relatives visitors are referred to as 'VFR only' visitors.

These categories will be used throughout the remainder of this report when referring to trip purpose, unless otherwise noted.

FIRST-TIME VISITORS

2015 saw an increase in the percentage of visitor parties identifying as first-time visitors to Nova Scotia. This increase traced primarily to first-time pleasure visitors. Notably, among pleasure visitors, the percentage identifying as first-time visitors increased by six percentage points since 2010 to 30% in 2015.

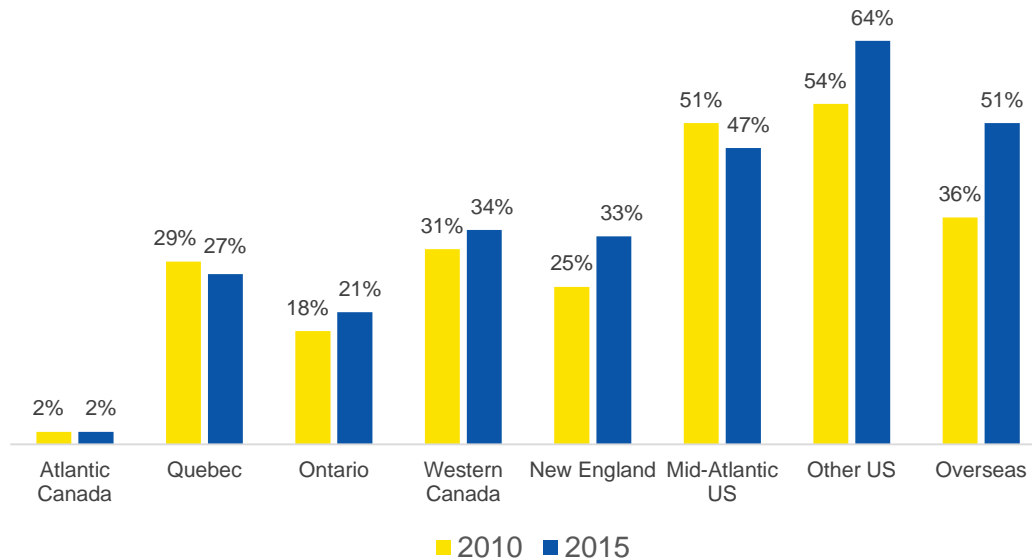


Source: Table T12

FIRST-TIME VISITORS

Visitor parties from Atlantic Canada are least likely to be first-time visitors to Nova Scotia. Those most likely to be first-time visitors include parties from Mid-Atlantic and Other US, as well as Overseas.

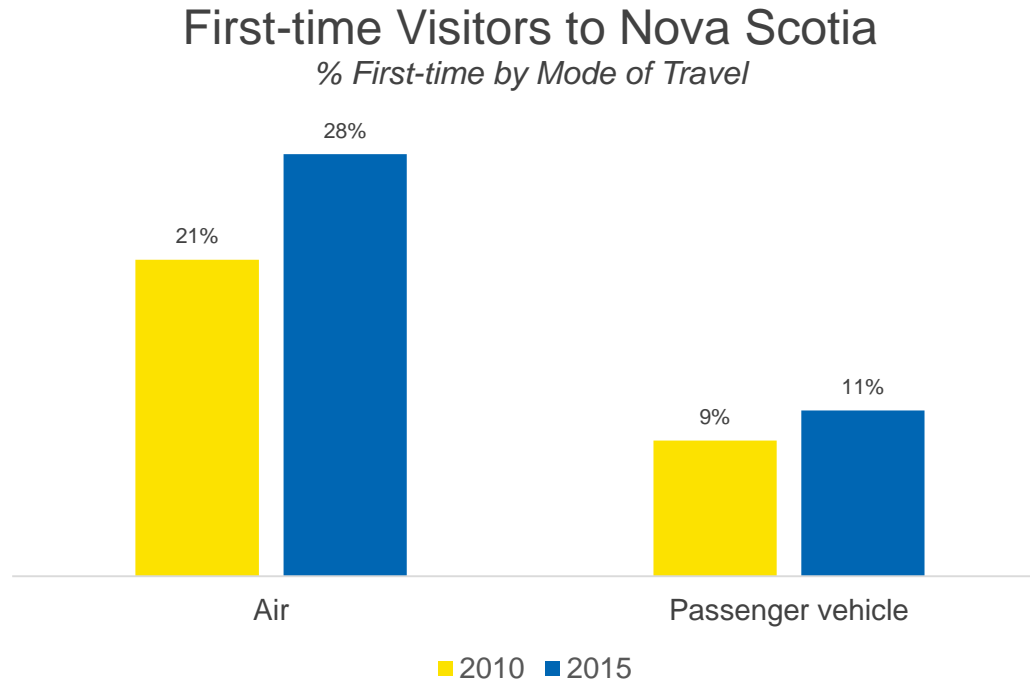
First-time Visitors to Nova Scotia
% First-time by Market Region



Source: Table T12

FIRST-TIME VISITORS

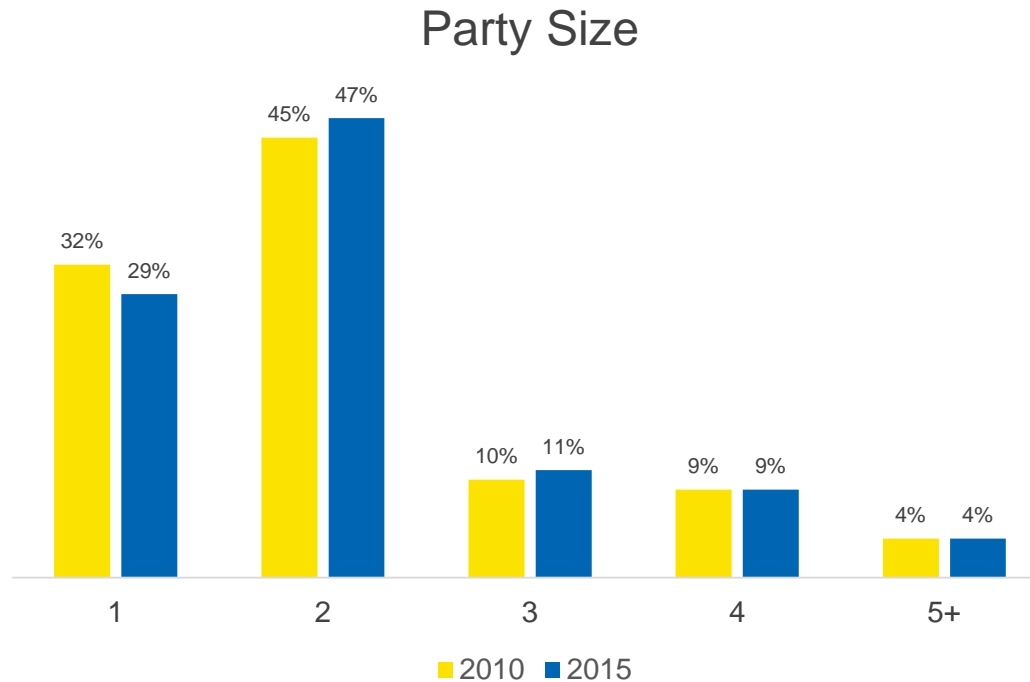
Air visitors were more than twice as likely as road visitors to be first-time visitors. There was a significant increase in the proportion of air visitor parties that identified as first-time visitors in 2015, compared with 2010.



Source: Table T12

PARTY CHARACTERISTICS

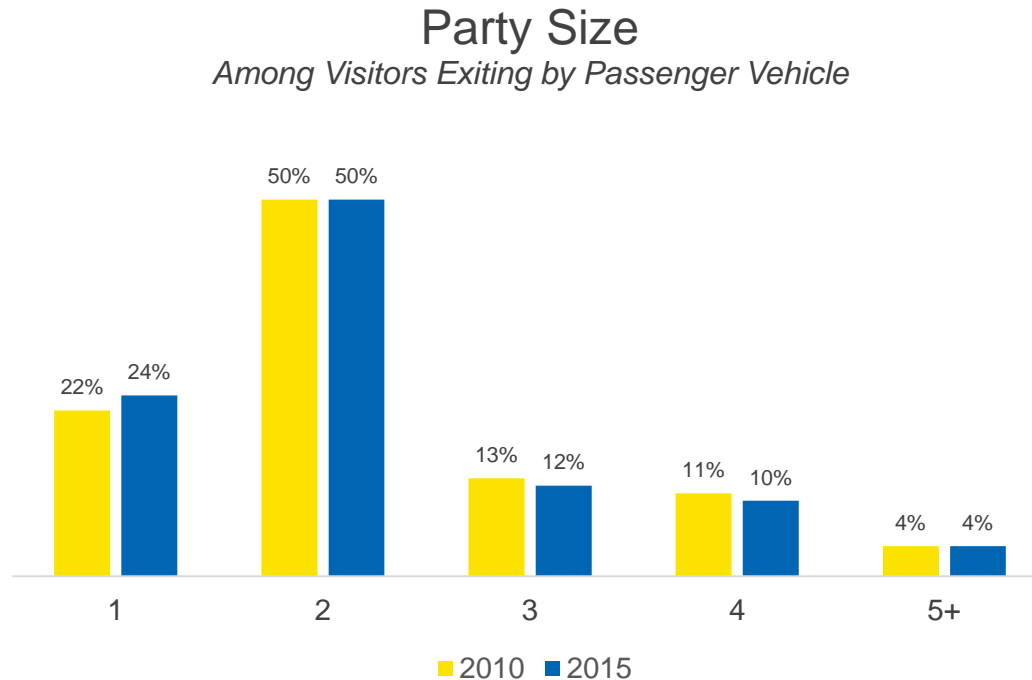
Overall, party sizes in 2015 were very similar to those reported in 2010. Nearly one-half of all parties visiting Nova Scotia consisted of two people, while three in ten were individual visitors.



Source: VES 2010 – Table B2/C1; VES 2015 - Table C1

PARTY CHARACTERISTICS

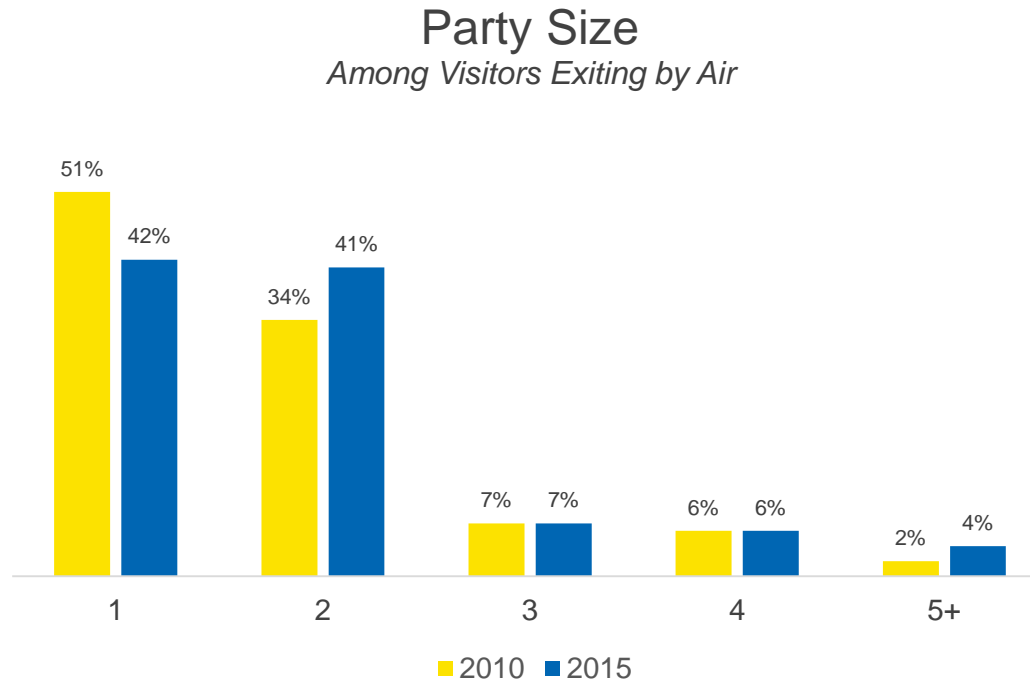
Among visitor parties that exited Nova Scotia via passenger vehicle, party sizes were similar to those reported in 2010.



Source: VES 2010 – Table B2; VES 2015 - Table C1

PARTY CHARACTERISTICS

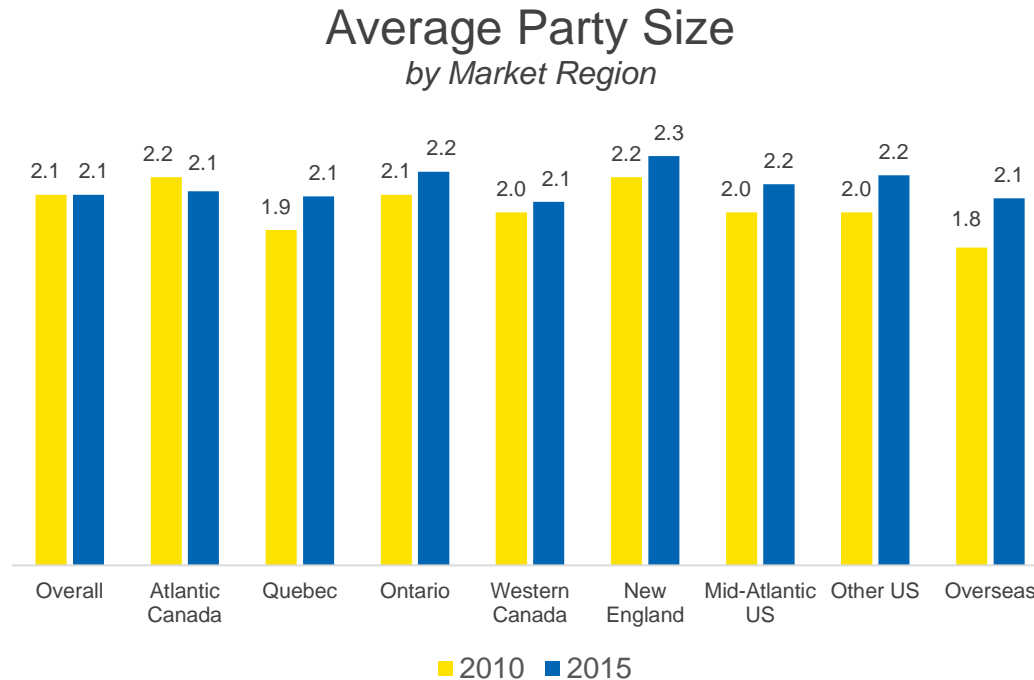
Among visitor parties that exited Nova Scotia by air, there was a decrease in solitary visitors, with a corresponding increase in parties of two.



Source: Table C1

PARTY CHARACTERISTICS

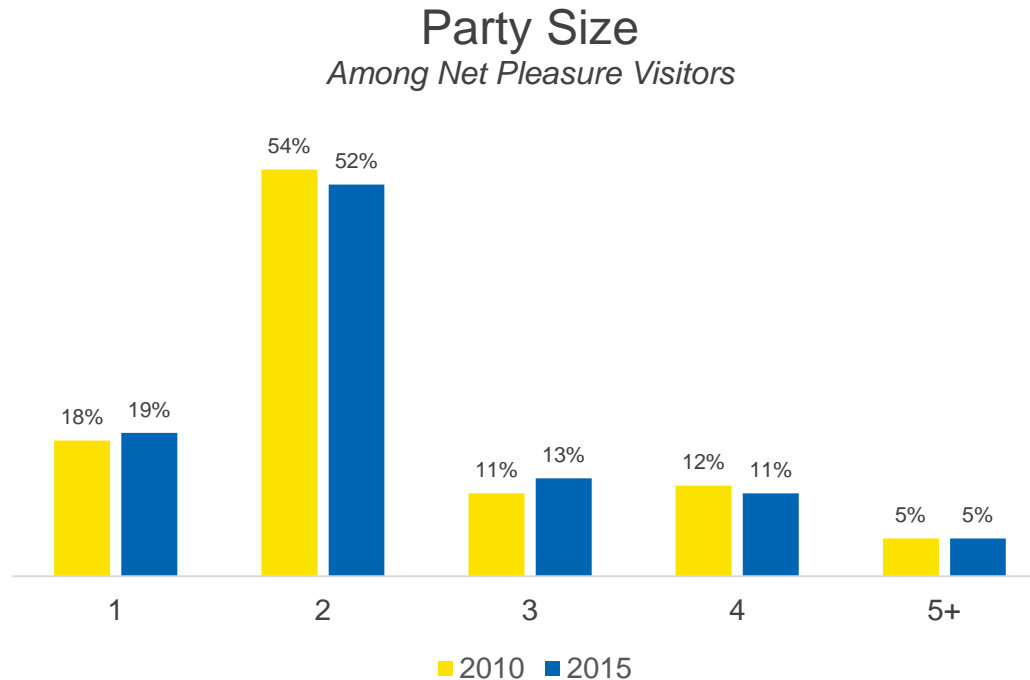
Among all visitor parties, the average party size was unchanged from 2010. There was a slight increase in average party size from most regions, with the exception of Atlantic Canada and Western Canada, which were similar to 2010.



Source: VES 2010 – Table B2/C1; VES 2015 - Table C1

PARTY CHARACTERISTICS

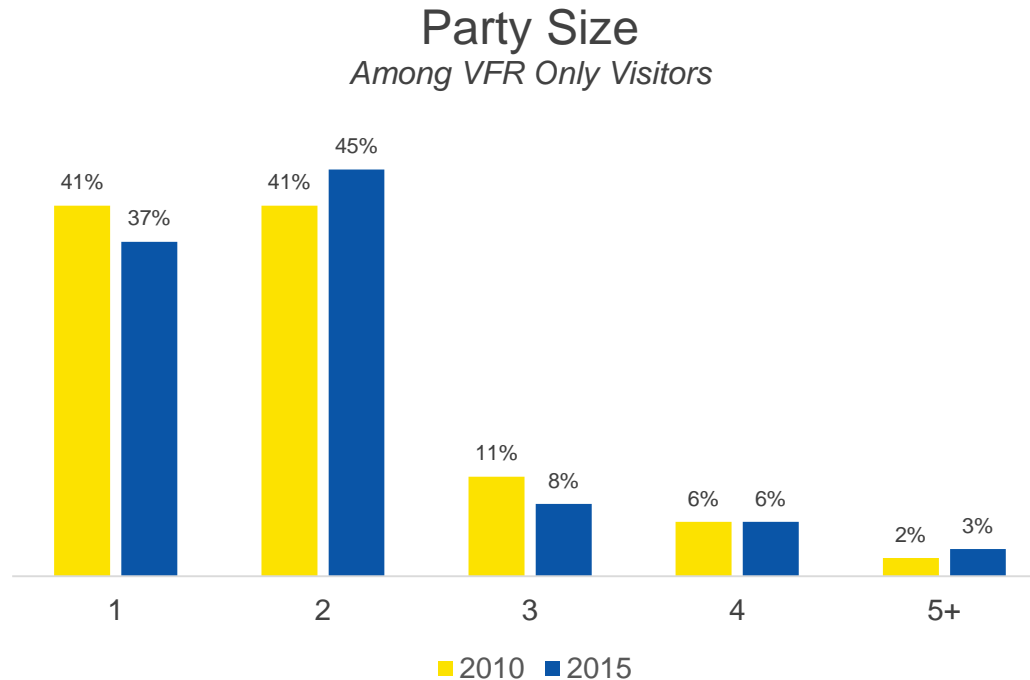
Party sizes reported by pleasure visitors in 2015 were consistent with 2010 results.



Source: VES 2010 – Table B2; VES 2015 - Table C1

PARTY CHARACTERISTICS

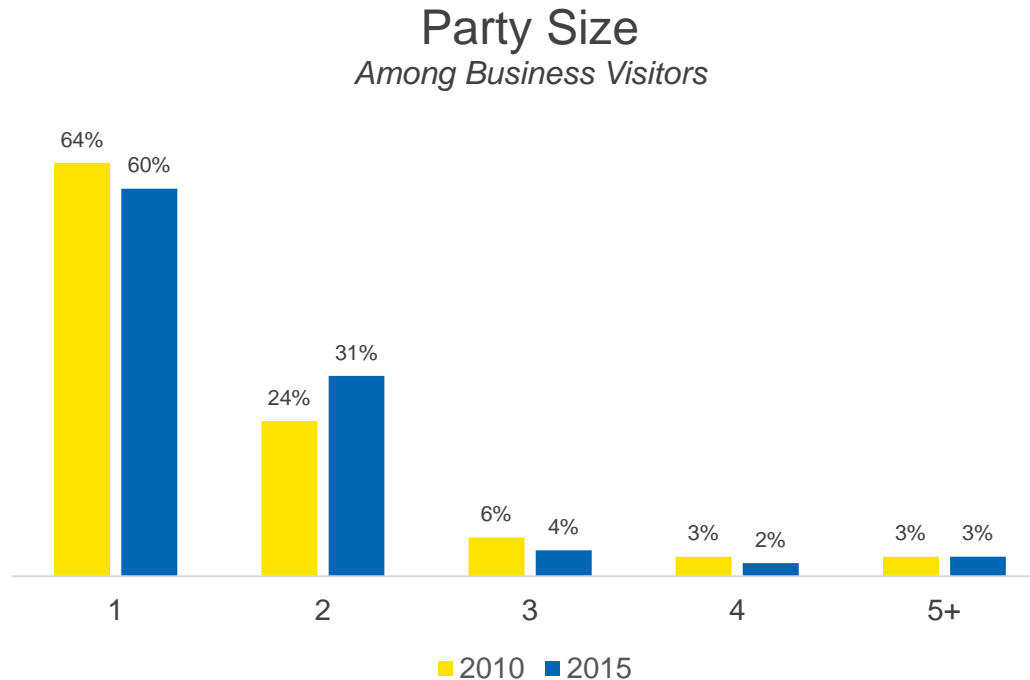
Compared with 2010, there was an increase in the proportion of VFR visitors travelling in parties of two, and a decrease in parties of one and three members.



Source: VES 2010 – Table B2; VES 2015 - Table C1

PARTY CHARACTERISTICS

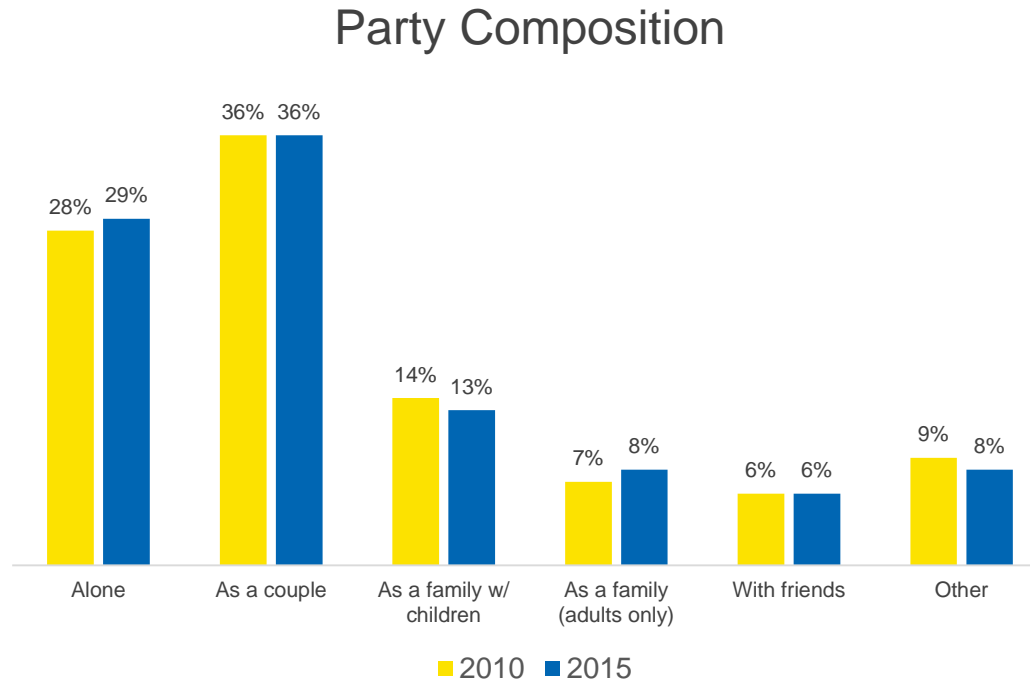
Although business visitors remained most likely to travel alone, the incidence of parties of two increased by seven percentage points compared with 2010.



Source: VES 2010 – Table B2; VES 2015 - Table C1

PARTY CHARACTERISTICS

Overall party composition reported by visitors in 2015 is consistent with 2010 results. Visitors were most likely to travel as a couple or alone.



Source: Table D10

TRIP CHARACTERISTICS

While there are some regional variances, across all regions, visitors in 2015 were most likely to report travelling as a couple.

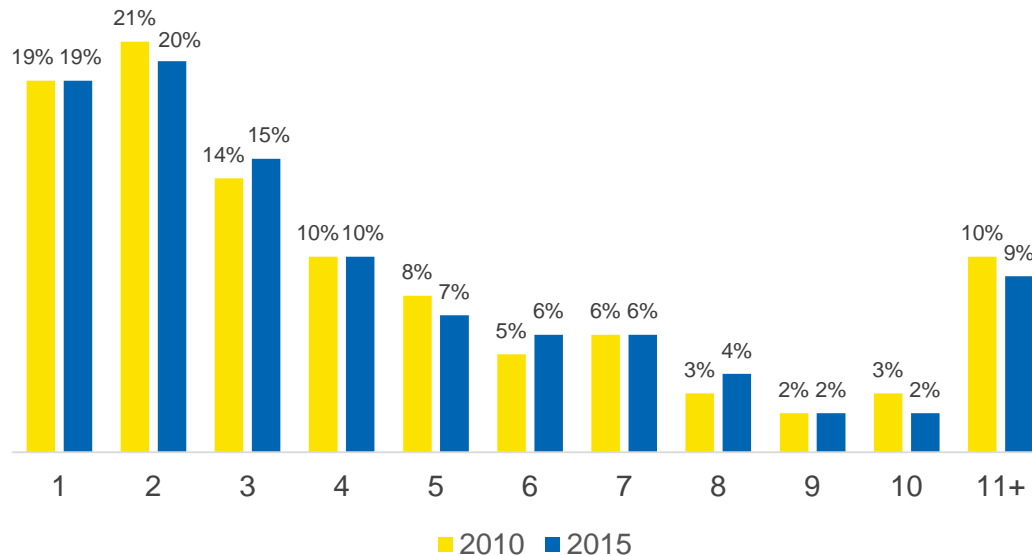
Party Composition by Market Region									
	Overall	Atlantic Canada	Quebec	Ontario	Western Canada	New England	Mid-Atlantic US	Other US	Overseas
Alone	29%	30%	35%	27%	31%	22%	30%	26%	34%
As a couple	36%	34%	33%	36%	39%	40%	37%	43%	41%
NET family	24%	23%	17%	28%	21%	25%	22%	19%	20%
Other	12%	13%	15%	9%	9%	13%	10%	11%	5%

Source: Table D10

PARTY CHARACTERISTICS

Overall, the majority of visitors stayed in Nova Scotia between one and three nights, unchanged from 2010.

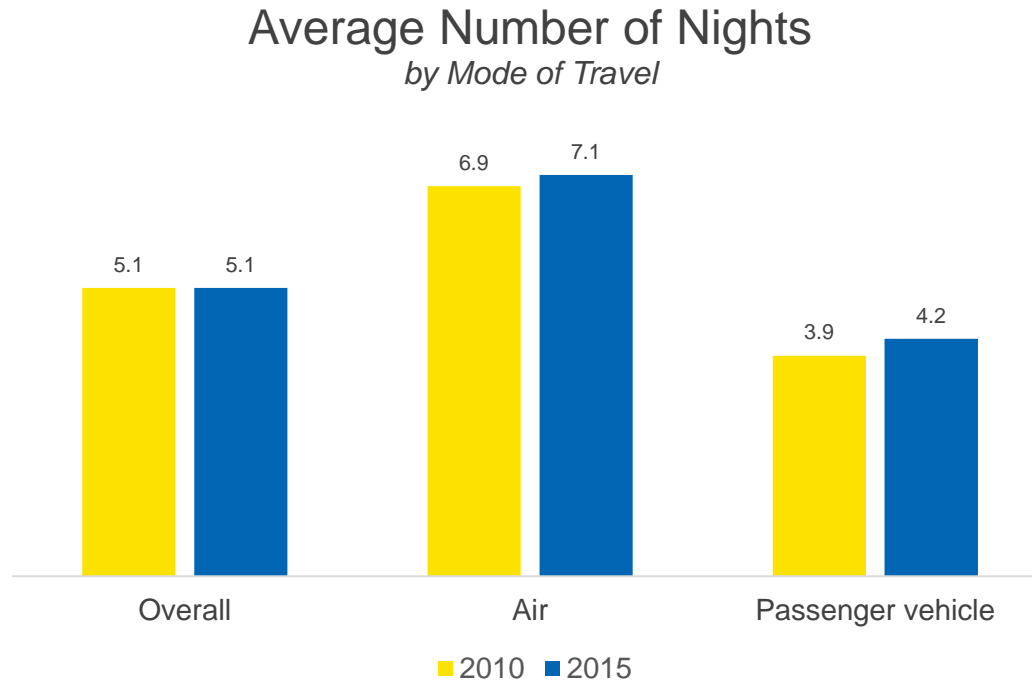
Number of Nights Stayed in Nova Scotia



Source: Table D1

PARTY CHARACTERISTICS

Overall, the average number of nights spent in the province remained consistent compared with 2010. Air visitors tend to stay longer compared with those travelling by passenger vehicle.

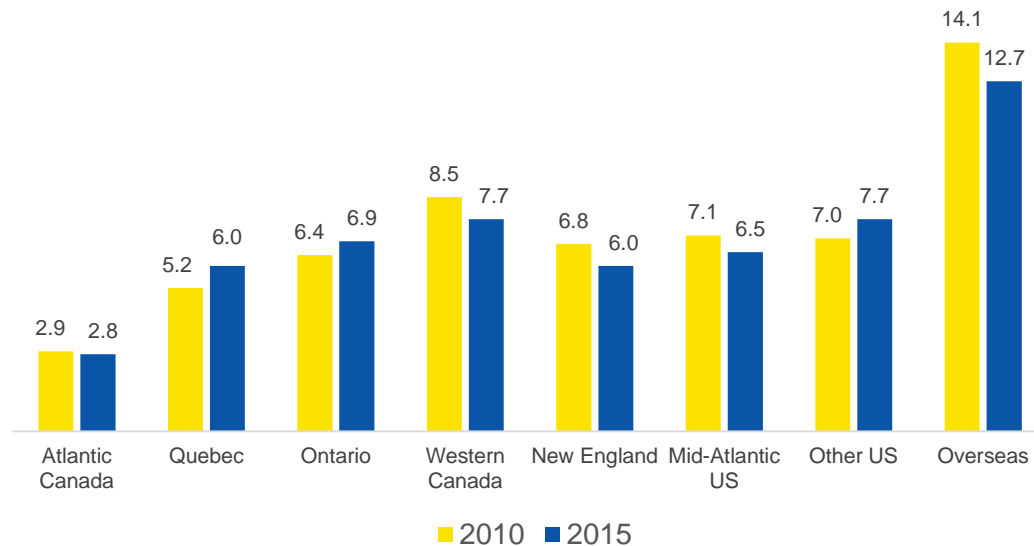


Source: Table D1

PARTY CHARACTERISTICS

Visitors from Quebec, Ontario and Other US spent longer in Nova Scotia in 2015, compared with 2010, with a decline in length of stay observed among Overseas visitors, as well as those visiting from Western Canada, New England, and Mid-Atlantic US.

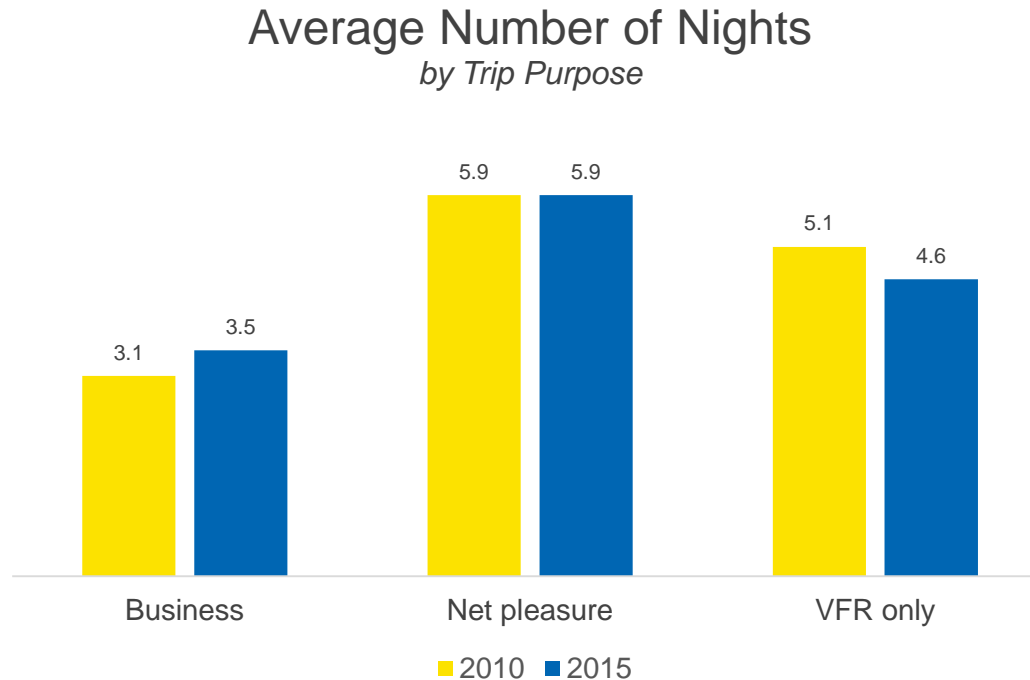
Average Number of Nights
by Market Region



Source: Table D1

PARTY CHARACTERISTICS

The average number of nights spent in Nova Scotia increased among business visitors, and declined among VFR visitors, compared with 2010. Results among pleasure visitors were consistent with 2010.

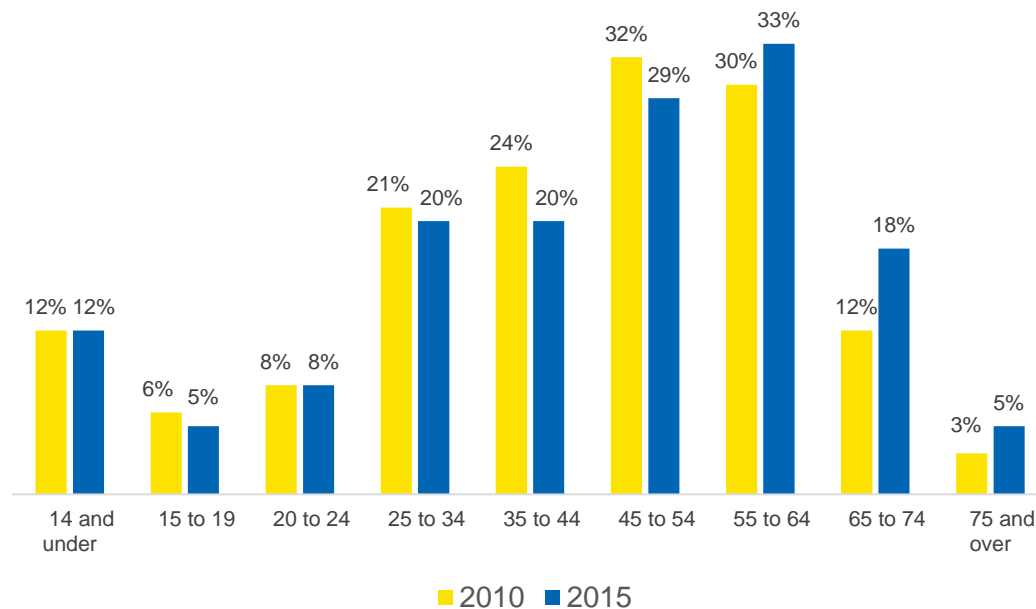


Source: Table D1

PARTY CHARACTERISTICS

The single largest age group represented among visitors to Nova Scotia in 2015 was visitors aged 55 to 64. The next largest group was those aged 45 to 54 years.

Age Groups Represented Within Party

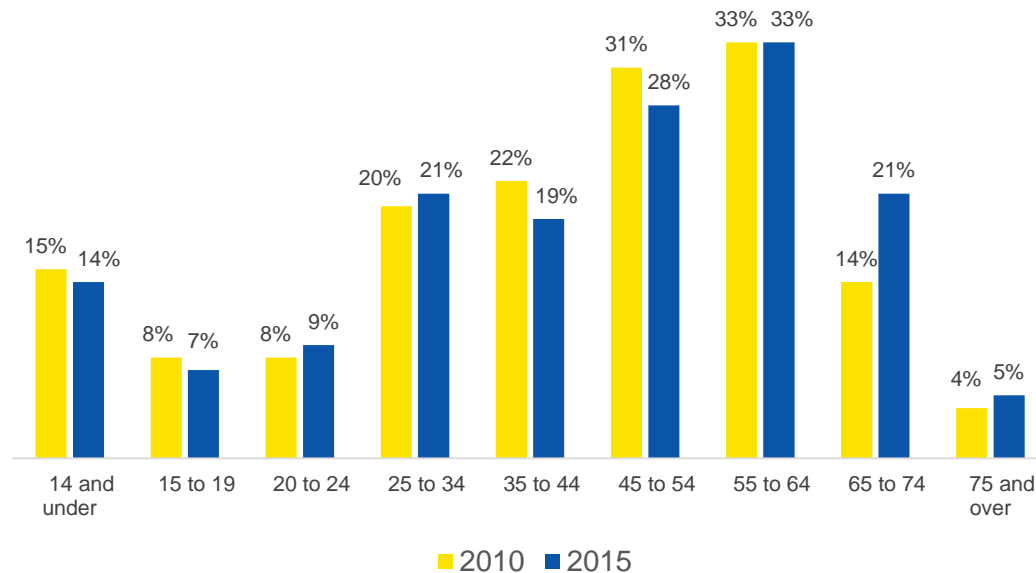


Source: Table D11

PARTY CHARACTERISTICS

Among pleasure visitors, the incidence of the various age groups was generally consistent with the overall visitor population.

Age Groups Represented Within Party
Among Net Pleasure Visitors

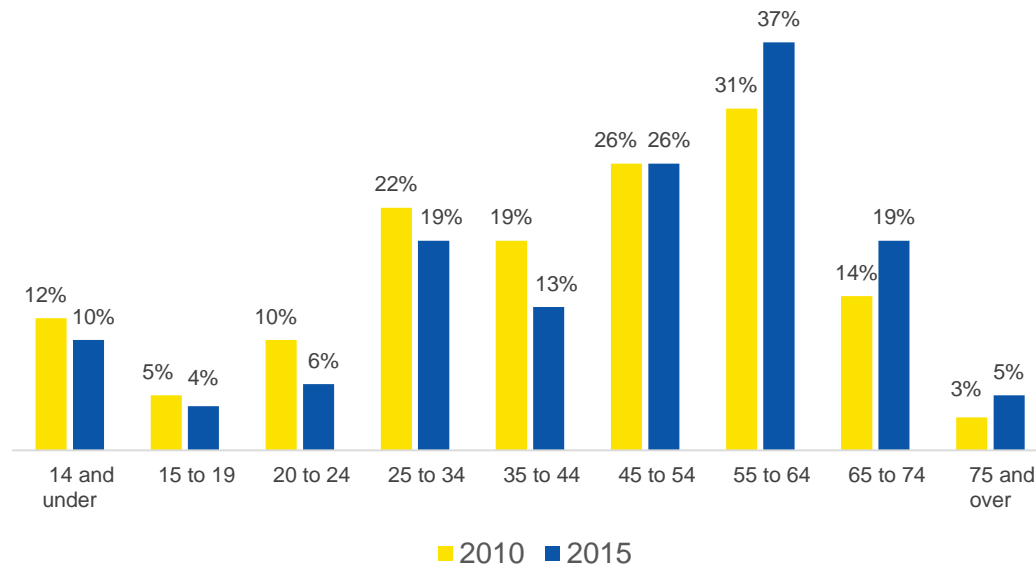


Source: Table D11

PARTY CHARACTERISTICS

Among VFR visitors, the incidence of the various age groups was generally consistent with the overall visitor population.

Age Groups Represented Within Party
Among VFR Only Visitors

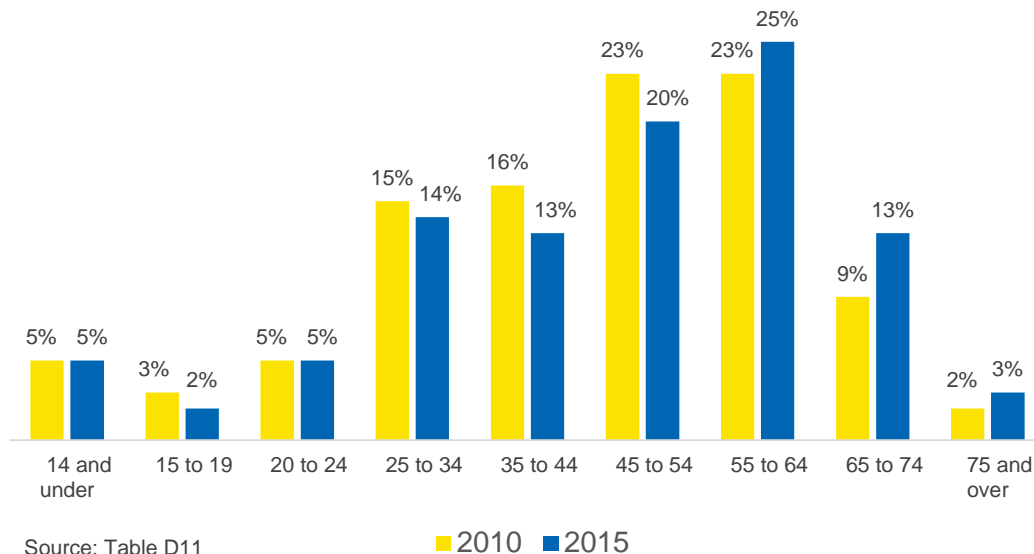


Source: Table D11

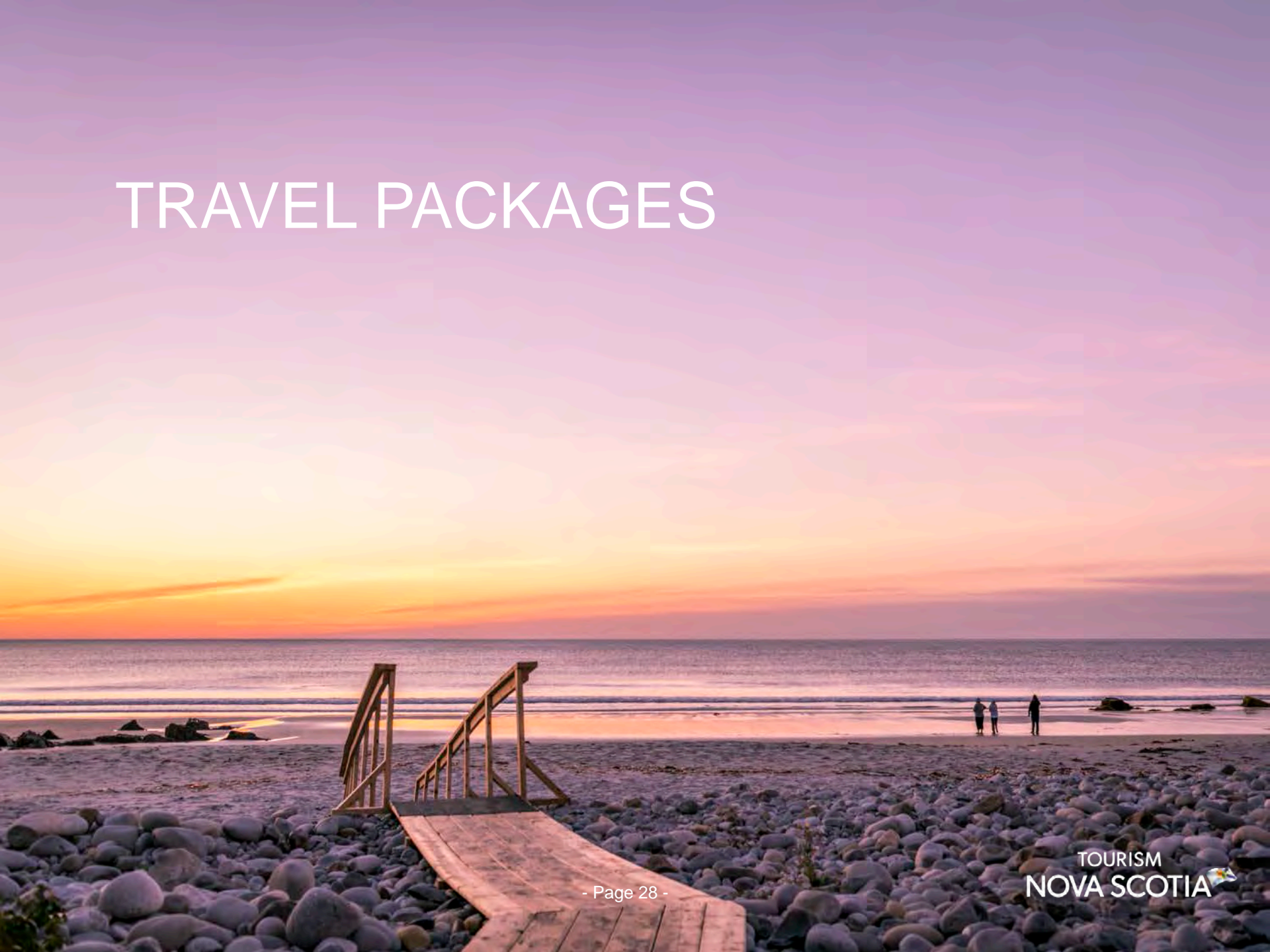
VISITOR CHARACTERISTICS

Survey respondents were asked to indicate the number of people in their party, as well as the age category for each party member. Based on this information, the VES data may be used to develop estimates of the age distribution for Nova Scotia's overall visitor population. More than four in ten visitors to Nova Scotia were aged 55 or older, while one-third were aged 35 to 54. One-quarter, meanwhile, were under 35 years of age. Compared with 2010, the visitor population had a slightly older age profile in 2015.

Visitors by Age Group



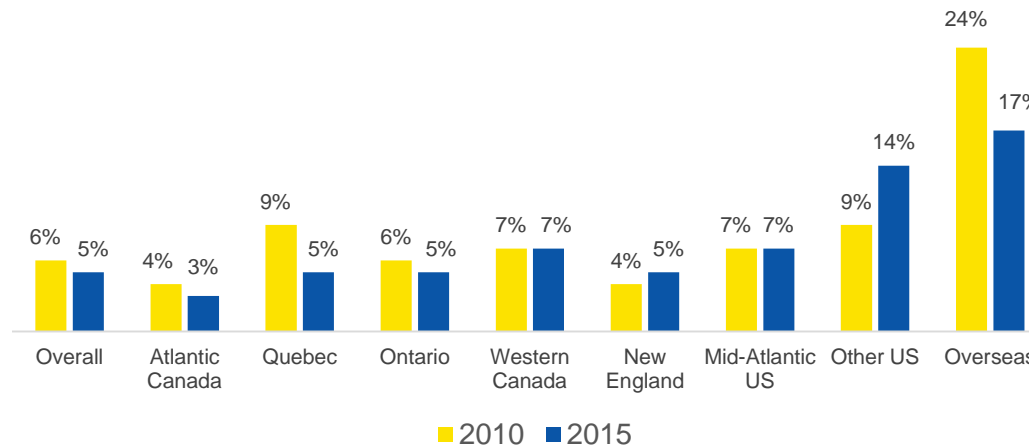
TRAVEL PACKAGES



TRAVEL PACKAGES

In 2015, the overall incidence of purchasing travel packages was similar to 2010, with the exception of the Quebec, Overseas and Other US markets. In Quebec and Overseas, the incidence of packaged travel purchases declined, while in Other US, the incidence of packaged travel purchases increased. Overseas visitors remained most likely to have purchased a travel package in 2015. Overall, one in twenty visitor parties reported purchasing at least part of the trip to Nova Scotia through a travel package.

Purchased at Least Part of Trip Through a Travel Package *by Market Region*

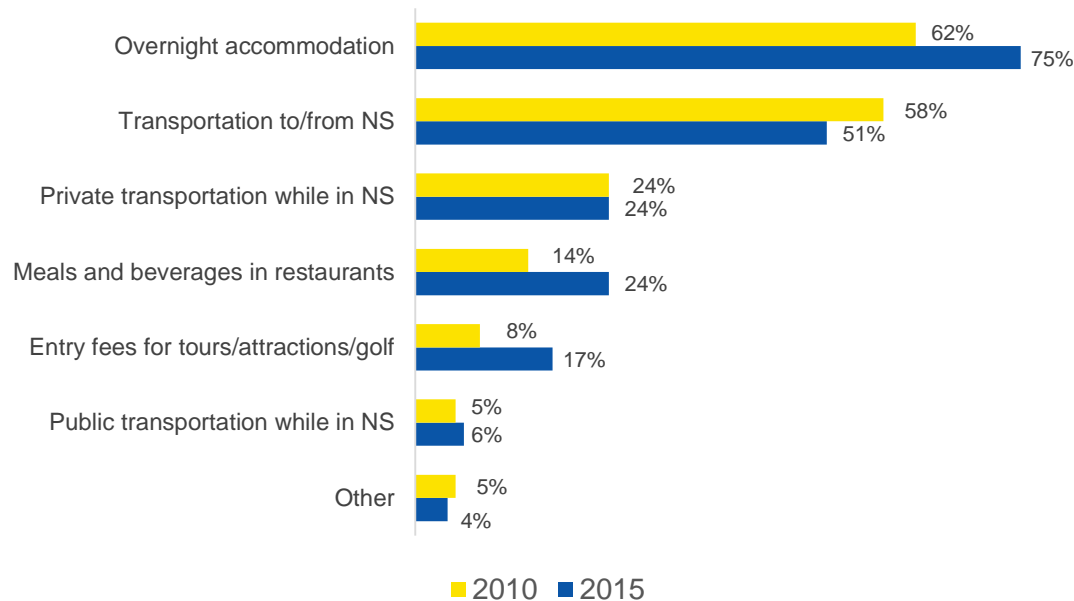


Source: Table D12

TRAVEL PACKAGES

Compared with 2010, travel packages purchased in 2015 were more likely to include overnight accommodation, restaurant meals and drinks, and attraction or activity fees, and less likely to include transportation to or from the province.

Travel Package Components



Source: Table D18

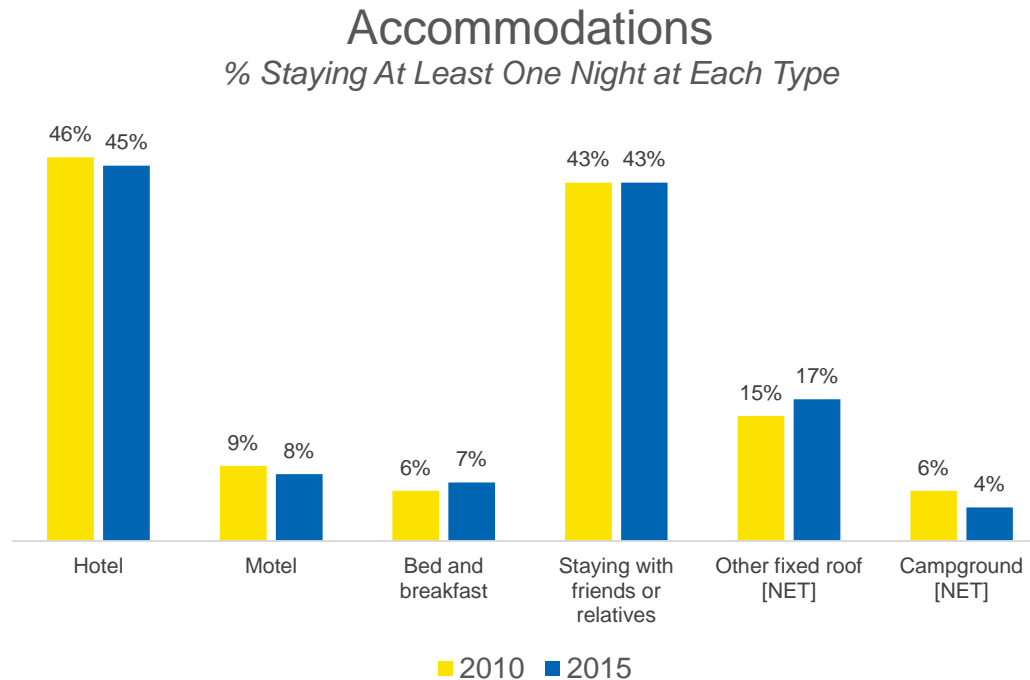
ACCOMMODATIONS

Types of Accommodations Used by Visitors to Nova Scotia



ACCOMMODATIONS

Accommodation types used by visitors in 2015 were virtually unchanged from 2010. Visitors were most likely to report staying at hotels or with friends/relatives.



Percentages add up to more than 100% because a visitor might stay in multiple types of accommodations during a single trip.

'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

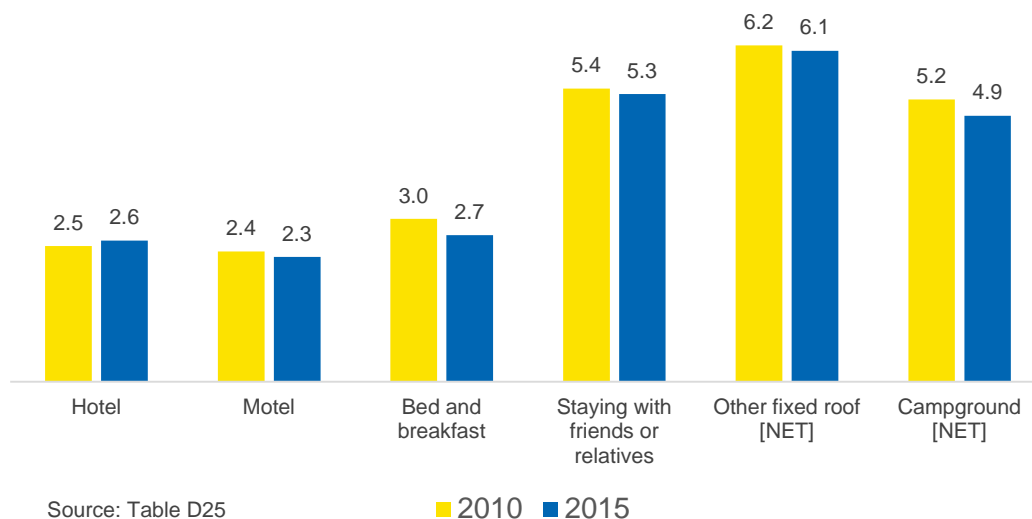
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

ACCOMMODATIONS

The average number of nights spent in each accommodation type in 2015 was consistent with 2010. Visitors reported the longest stays at other fixed roof accommodations, friends/relatives, and campgrounds. Stays at hotels, motels, and bed & breakfast accommodations tended to be shorter.

Nights Spent by Accommodation Type
Among Parties who Spent Nights in Those Accommodation Types

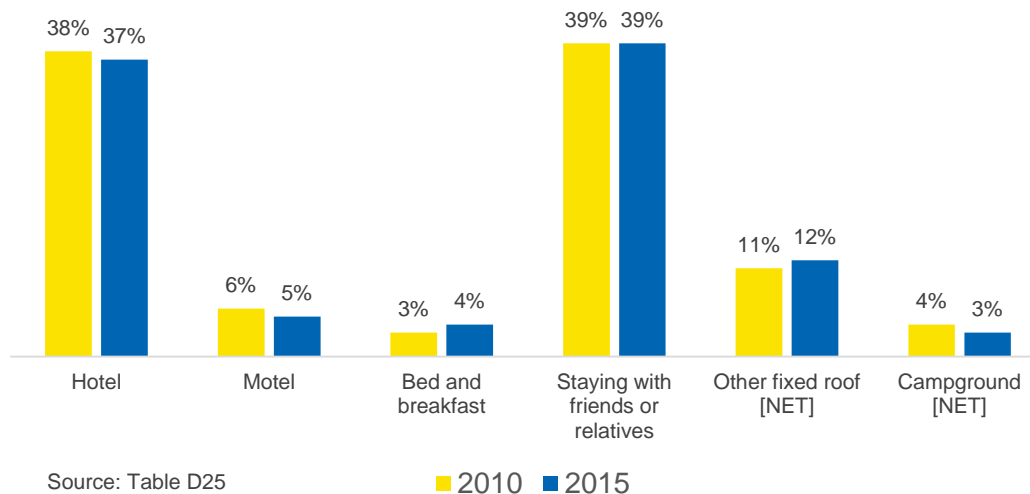


Note that the average number of nights by accommodation type does not directly relate to the total length of a trip, as a visitor might stay in more than one type of accommodation during their Nova Scotia visit.

ACCOMMODATIONS

Survey respondents were asked to identify the types of accommodations used and the number of nights spent at each type of accommodation. Using this information, estimates of each accommodation type's share of overall nights may be developed. Friends/relatives and hotels accounted for the majority of visitor nights, and results are consistent with 2010.

Share of Nights by Accommodation
Type
Among All Parties



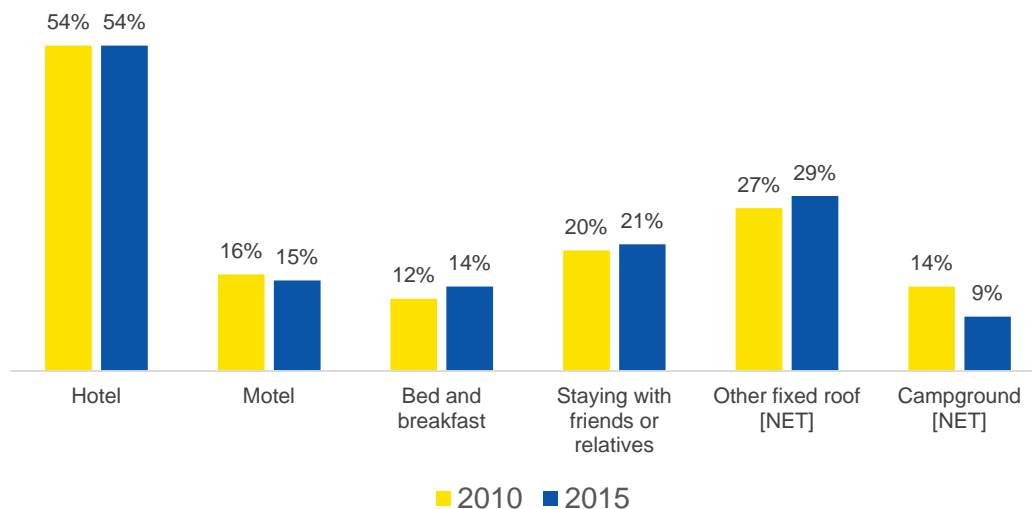
'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

'NET campground' includes national, provincial, and commercial campgrounds.

ACCOMMODATIONS

Accommodation types used by pleasure visitors in 2015 were virtually unchanged from 2010. Visitors were most likely to report staying at hotels, followed by friends/relatives.

Percentage Staying in Each Type of Accommodation
Among Pleasure Parties



Percentages add up to more than 100% because a visitor might stay in multiple types of accommodations during a single trip.

'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

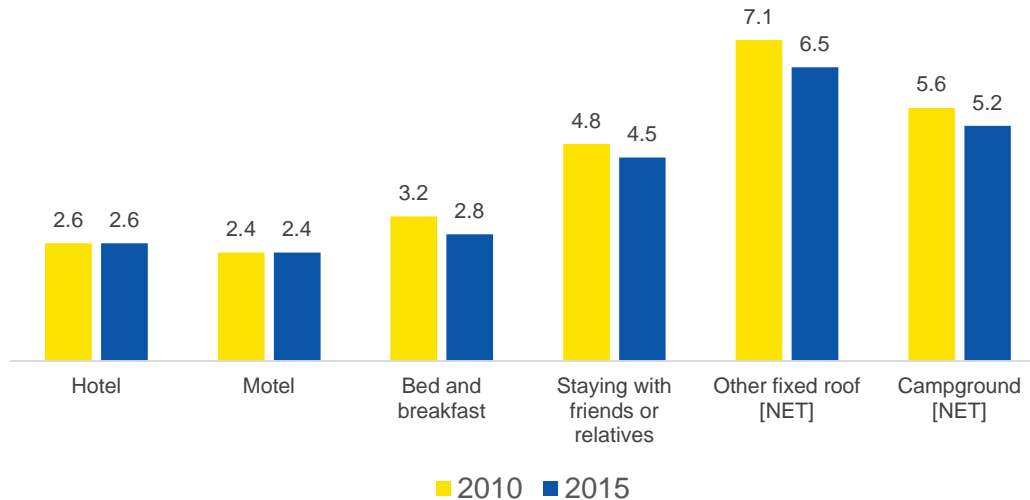
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

ACCOMMODATIONS

Among pleasure visitors in 2015, the average number of nights spent at the various accommodation types declined slightly, with the exception of stays at hotels and motels, which recorded results consistent with 2010.

Average Nights Spent in
Accommodation
Among Pleasure Parties



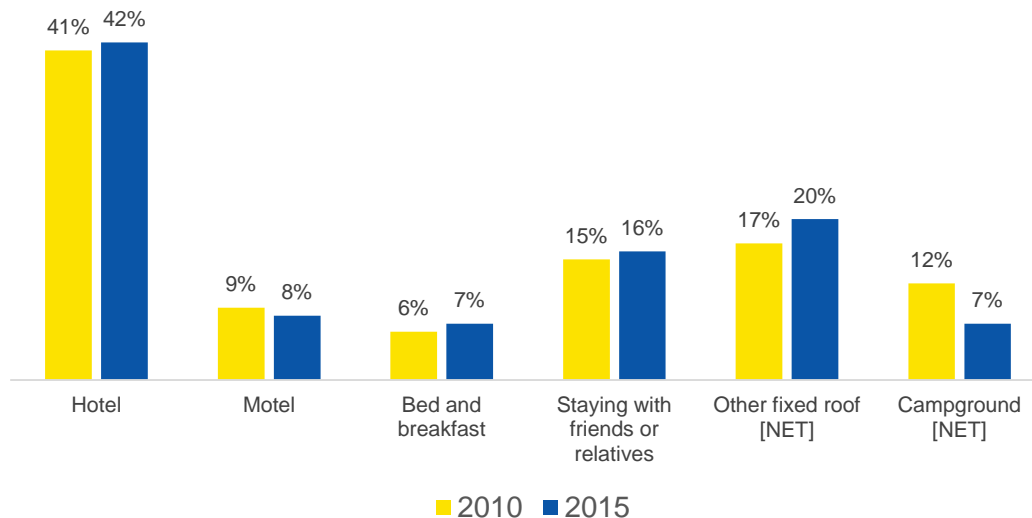
Note that the average number of nights by accommodation type does not directly relate to the total length of a trip, as a visitor might stay in more than one type of accommodation during their Nova Scotia visit.

Source: Table D25

ACCOMMODATIONS

Looking at each accommodation type's share of overall nights in Nova Scotia among pleasure visitors, hotels received the largest share of nights. Results were generally consistent with 2010, with the exception of campgrounds, whose share of nights declined by five percentage points to seven per cent.

Share of Nights by Accommodation
Type
Among Pleasure Parties



'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

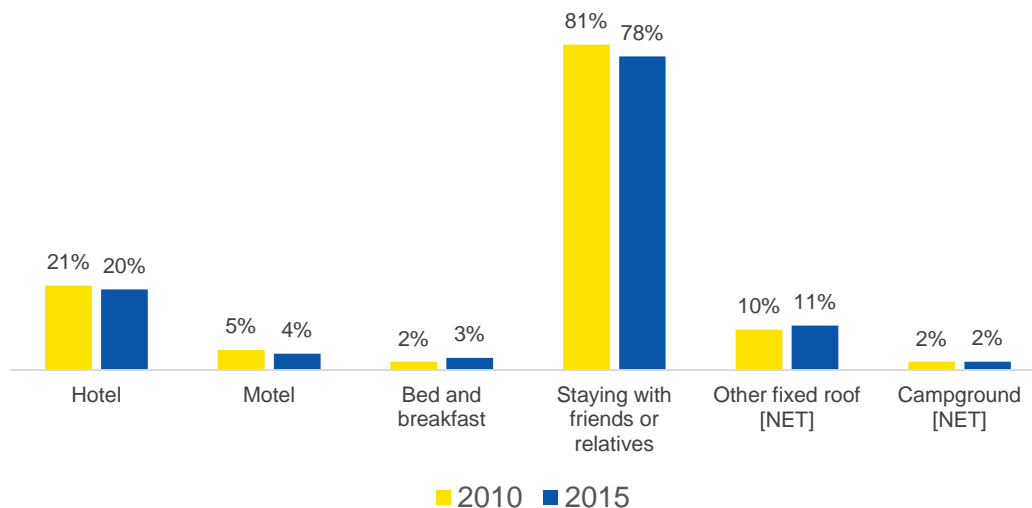
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

ACCOMMODATIONS

As might be expected, the vast majority of VFR visitors reported they stayed with friends or relatives while in Nova Scotia, consistent with 2010 results.

Percentage Staying in Each Type of Accommodation
Among VFR Parties



Percentages add up to more than 100% because a visitor might stay in multiple types of accommodations during a single trip.

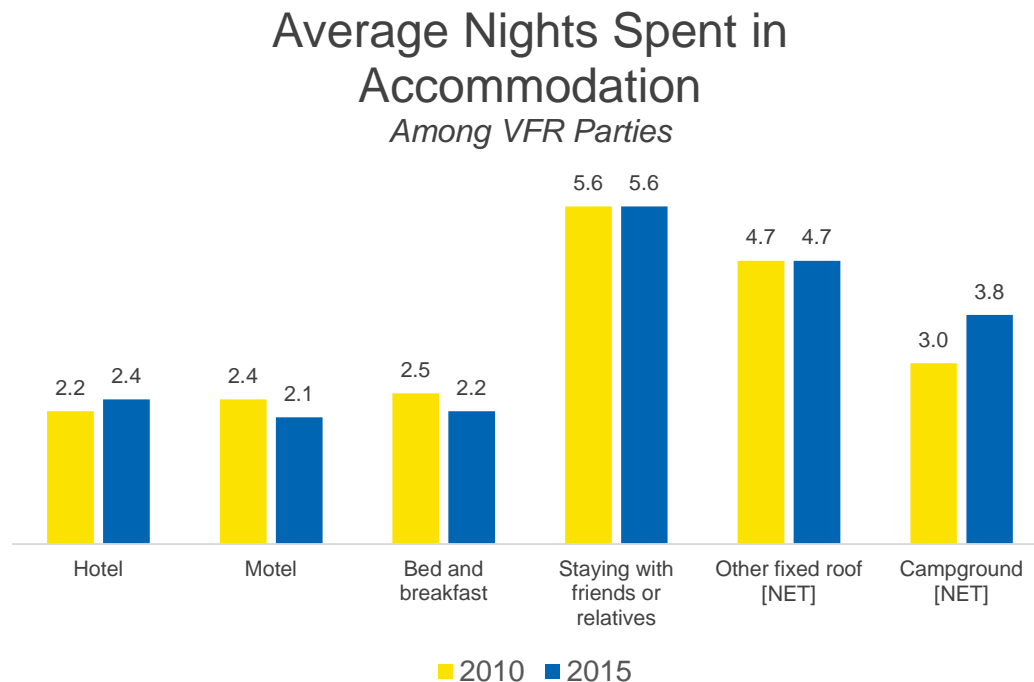
'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

ACCOMMODATIONS

In 2015, VFR visitors reported slightly shorter stays in motels and bed and breakfasts and longer stays at hotels and campgrounds, compared with 2010.



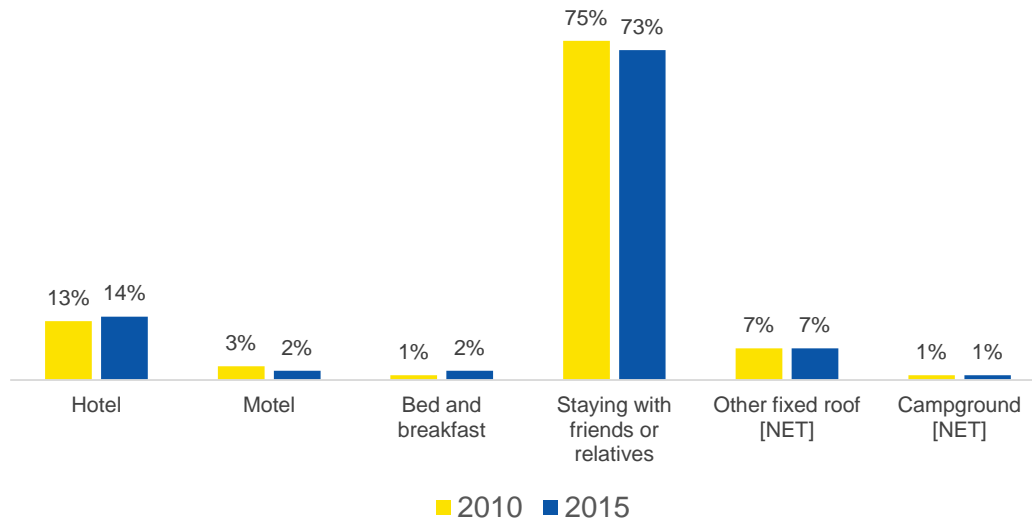
Note that the average number of nights by accommodation type does not directly relate to the total length of a trip, as a visitor might stay in more than one type of accommodation during their Nova Scotia visit.

Source: Table D25

ACCOMMODATIONS

Looking at each accommodation type's share of overall nights in Nova Scotia among VFR visitors, friends and relatives received the largest percentage of overall nights in Nova Scotia. Results in 2015 were consistent with 2010.

Share of Nights by Accommodation Type
Among VFR Parties



'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

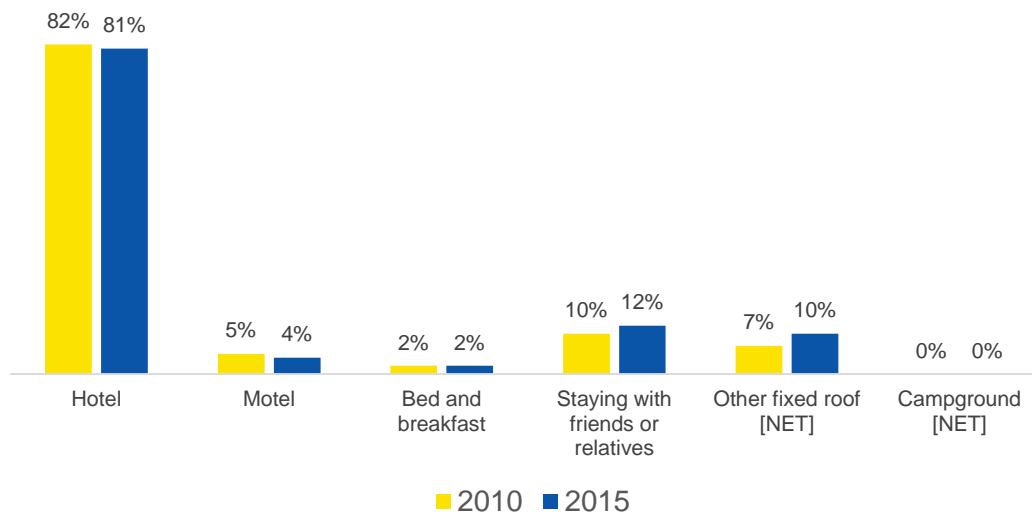
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

ACCOMMODATIONS

Accommodation types used by business visitors in 2015 were very similar to 2010. The vast majority of business visitors reported staying in a hotel.

Percentage Staying in Each Type of Accommodation
Among Business Parties



Percentages add up to more than 100% because a visitor might stay in multiple types of accommodations during a single trip.

'NET other fixed roof' accommodations includes inns, resorts, rented and owned cottages or cabins, universities, and 'other' responses.

'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

VISITOR ACTIVITIES

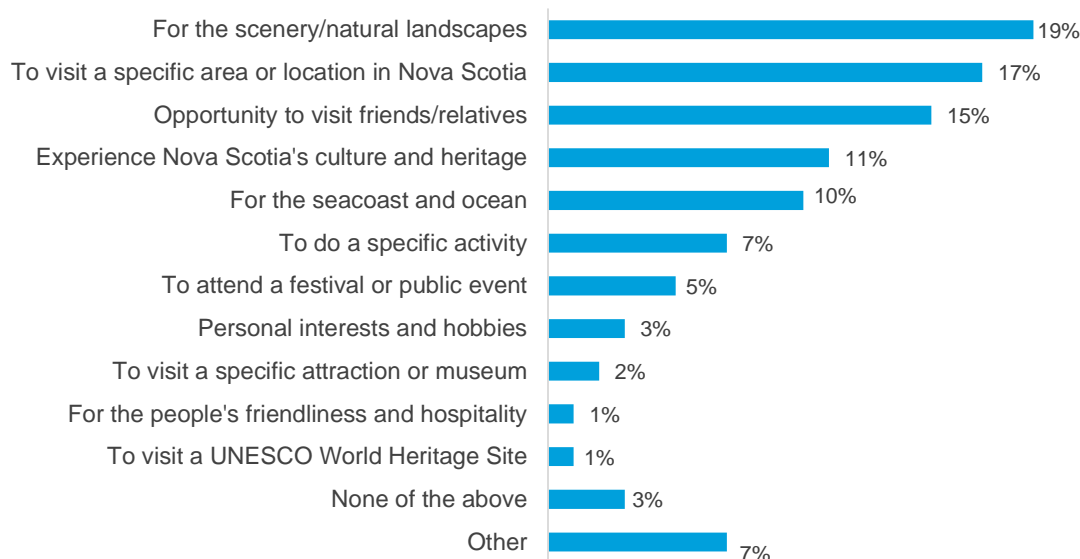
Reasons for Travel to Nova Scotia, Popular Activities & Attractions

TRAVEL MOTIVATORS

Pleasure visitors were asked to select the main reason for choosing to visit Nova Scotia from a list of factors. These visitors were most likely to select 'scenery/natural landscape' as the main reason for choosing to visit Nova Scotia. Other reasons pleasure visitors chose Nova Scotia as a vacation destination included to visit a specific location or area, for the opportunity to visit family and friends, to experience Nova Scotia's culture and heritage, and for the ocean and seacoast.

Main Reason for Visiting Nova Scotia

Among Pleasure Visitors



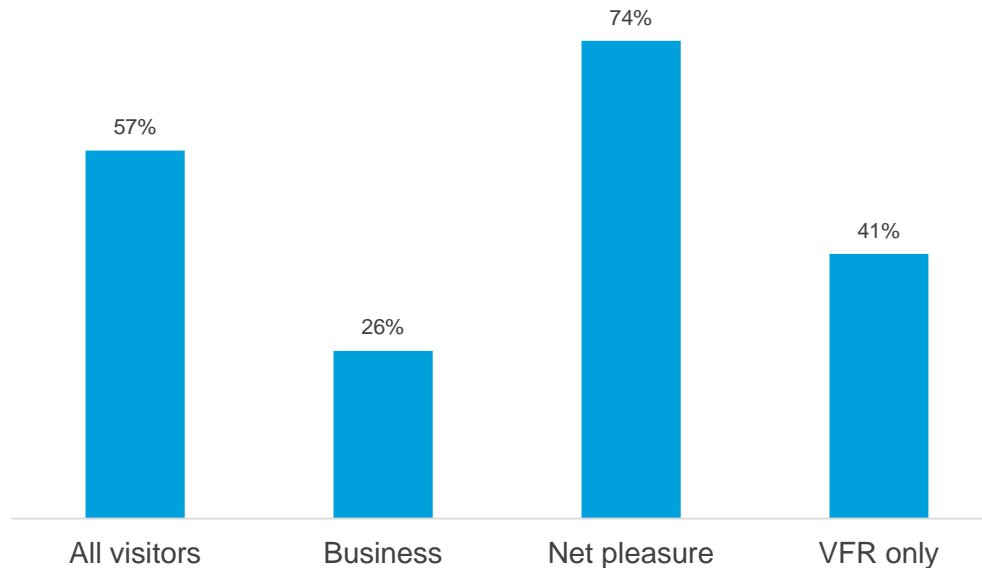
Source: Table D8

Note: No comparable 2010 data

OUTDOOR ACTIVITIES

Among all visitor parties, pleasure visitors were most likely to engage in outdoor activities, with three-quarters reporting they or someone in their travel party participated in at least one outdoor activity. Those visiting for business were least likely to participate in outdoor activities.

Participated in Outdoor Activities
% 'Yes', by Trip Purpose

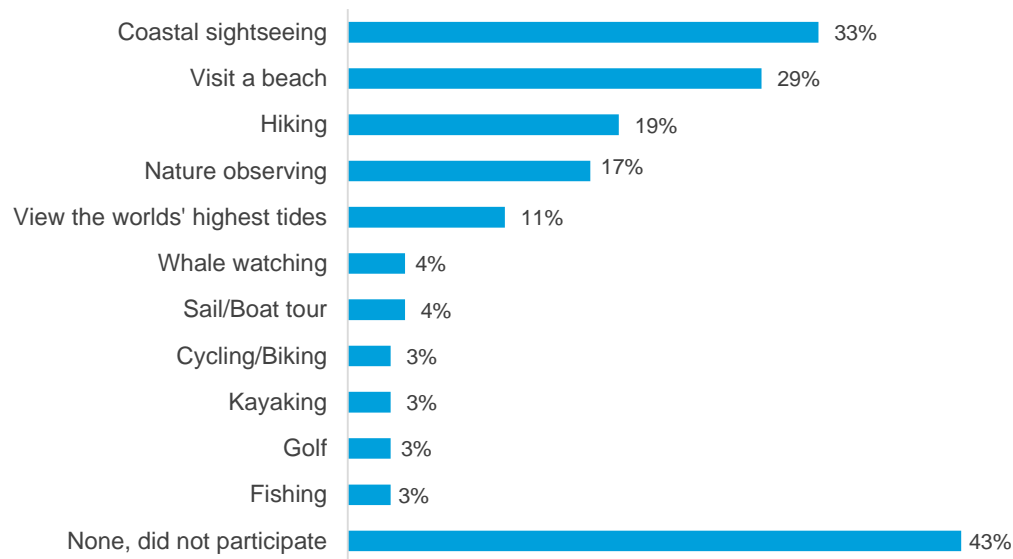


Source: Table N2
Note: No comparable 2010 data

OUTDOOR ACTIVITIES

Two of the most popular outdoor activities were related to Nova Scotia's coastlines: coastal sightseeing and visiting a beach. In addition, a significant number of visitor parties went hiking or participated in nature observation activities, while one in ten reported viewing the world's highest tides.

Participation in Outdoor Activities *Among All Visitors*



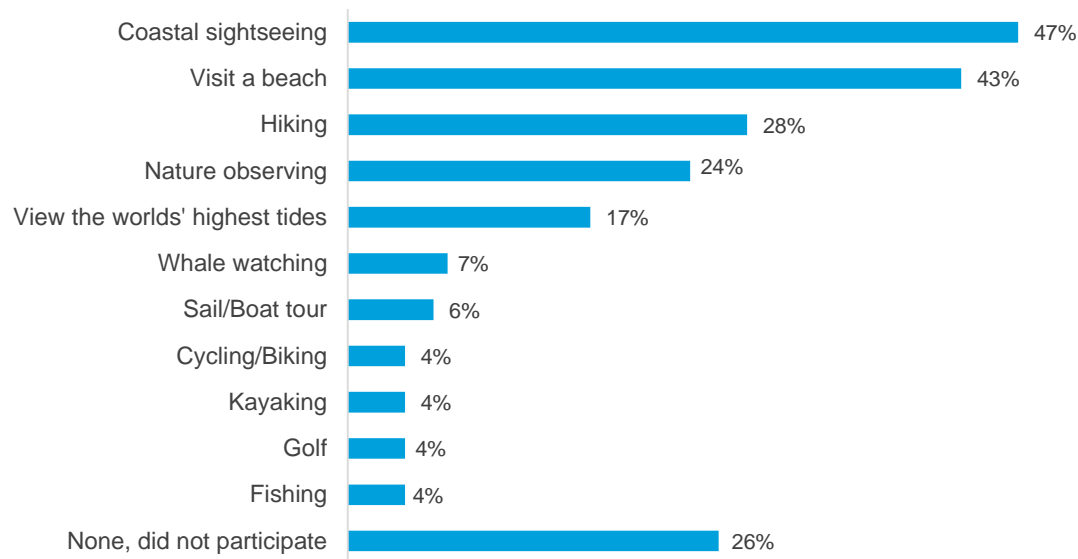
Source: Table N2

Note: No comparable 2010 data

OUTDOOR ACTIVITIES

Close to one-half of pleasure travel parties reported going coastal sightseeing, while just over four in ten visited a beach. Other popular outdoor activities included hiking, nature observing, and viewing the world's highest tides.

Participation in Outdoor Activities *Among Net Pleasure Visitors*

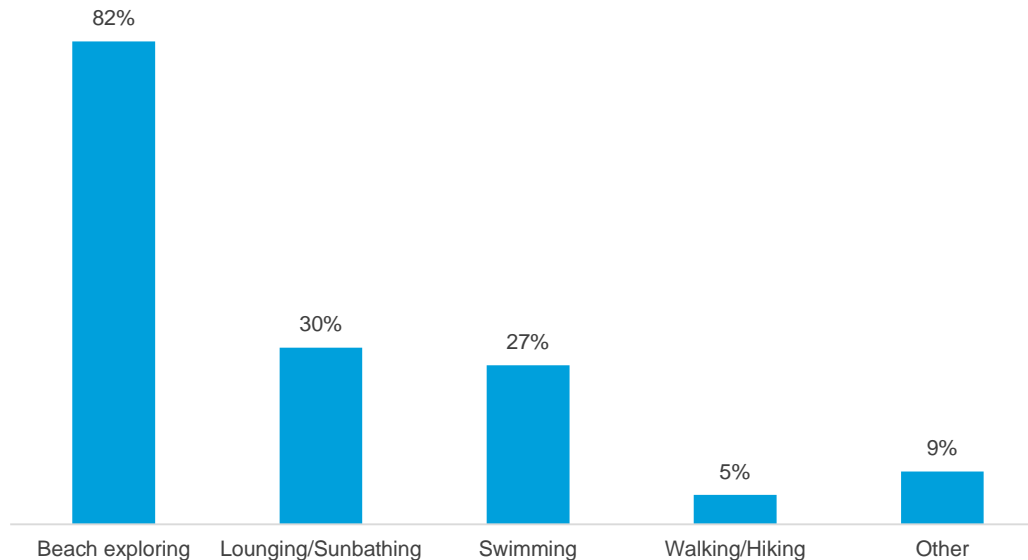


Source: Table N2

OUTDOOR ACTIVITIES

Among those who visited a beach, beach exploring was the most popular activity, with visitors less likely to indicate they visited a beach to lounge/sunbathe or to go swimming.

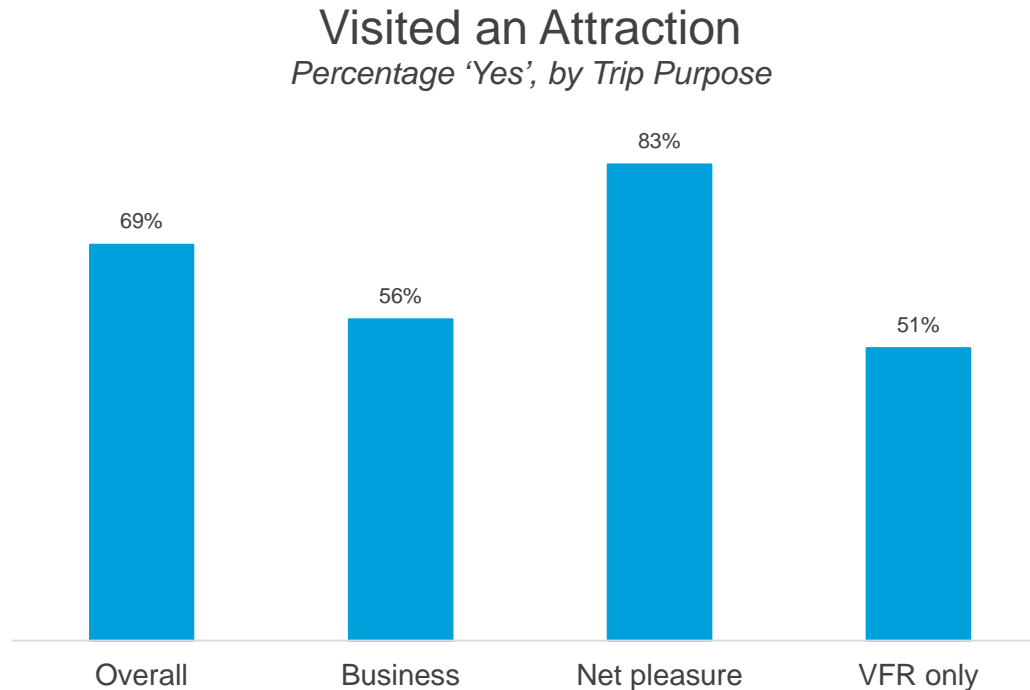
Participation in Beach Activities
Among Those Visiting a Beach



Source: Table N4c

ATTRACTIONS, EVENTS AND ACTIVITIES

Seven in ten visitor parties visited at least one of a selected list of Nova Scotia attractions. Pleasure visitors were most likely to report visiting an attraction, with VFR only and business parties less likely to report visiting an attraction while in Nova Scotia.

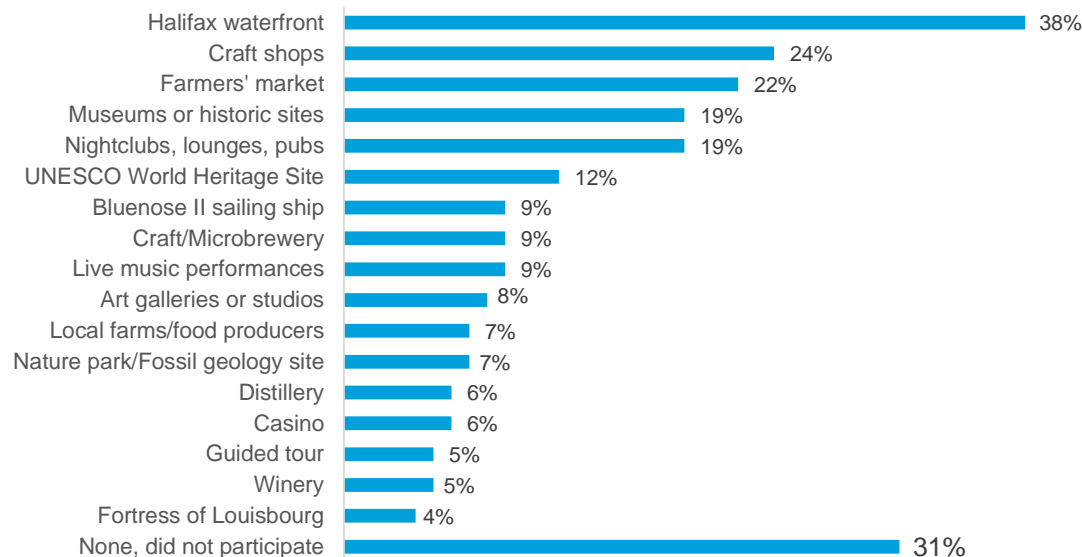


Source: Table N3

ATTRACTIONS, EVENTS AND ACTIVITIES

The Halifax waterfront remains the most popular attraction among visitors, while visiting craft shops and studios, farmers' markets, museums and historic sites were also popular activities.

Attractions, Events and Activities *Among All Visitors*

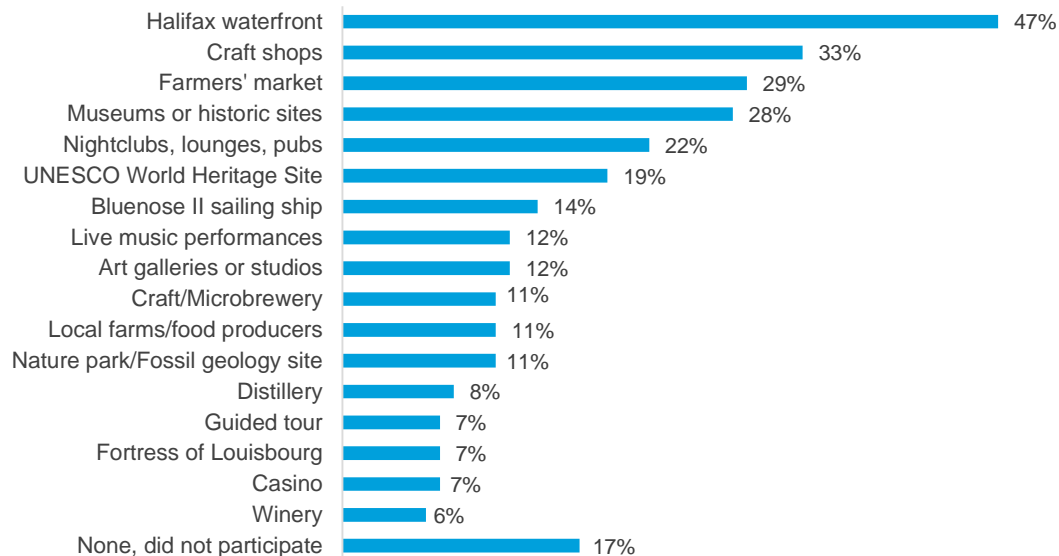


Source: Table N3

ATTRACTIONS, EVENTS AND ACTIVITIES

Among those visiting for pleasure, over eight in ten reported visiting at least one attraction listed in the survey. The top attractions were the Halifax waterfront, craft shops and studios, farmers' markets, museums and historic sites, and nightclubs, lounges and pubs. In addition, two in ten reported visiting a UNESCO World Heritage Site.

Attractions, Events and Activities *Among Net Pleasure Visitors*



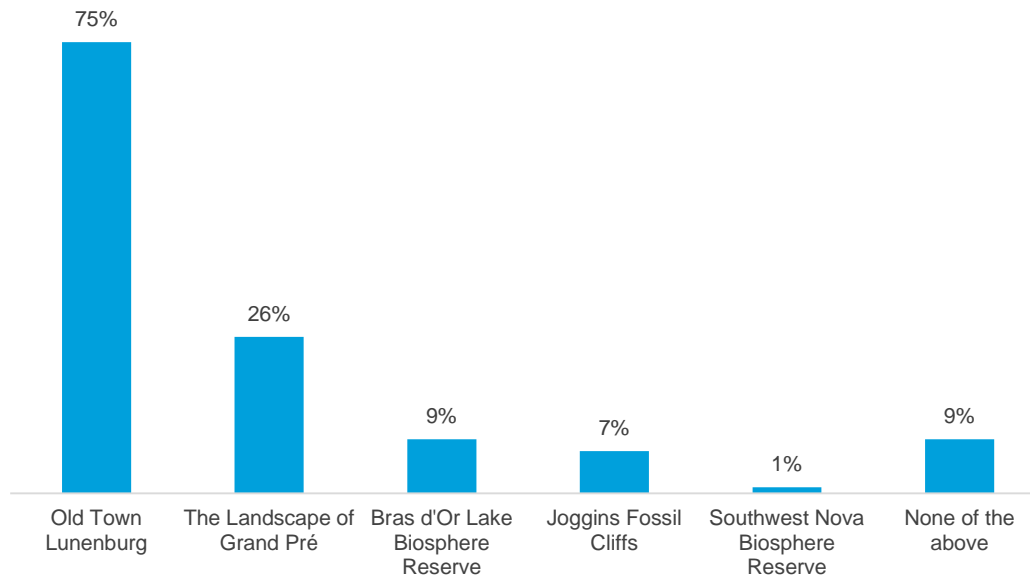
Source: Table N3

ATTRACTIONS, EVENTS AND ACTIVITIES

Among those visiting a UNESCO World Heritage Site, three-quarters visited Lunenburg, one-quarter visited Grand Pré, and approximately one in ten each visited the Bras d'Or Lake Biosphere and the Joggins Fossil Cliffs.

UNESCO Sites Visited

Among Those Visiting a UNESCO World Heritage Site

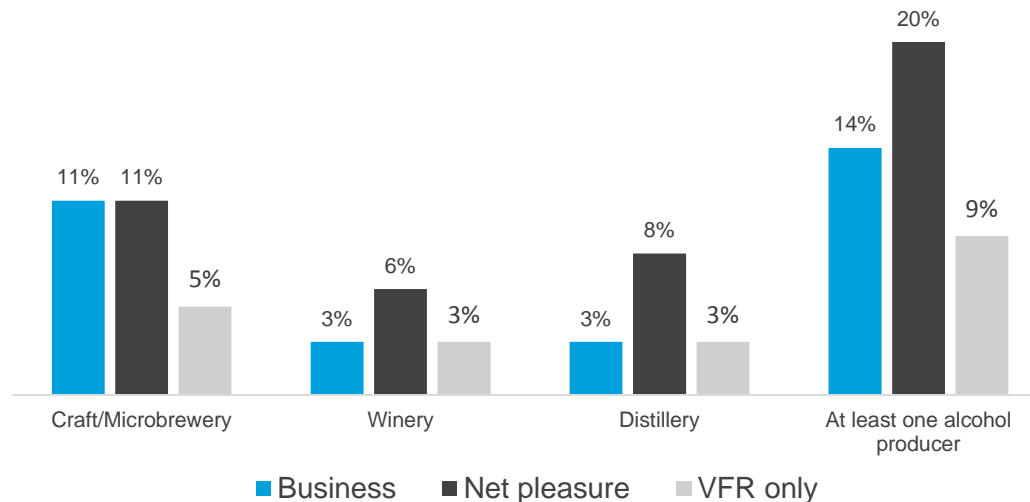


Source: Table N3am

ATTRACTIONS, EVENTS AND ACTIVITIES

Nova Scotia has a well-established wine industry, and in recent years, has seen growth in craft/microbrewery and spirits production. In 2015, close to two in ten (16%) visitor parties visited at least one local alcohol producer during their Nova Scotia visit. Pleasure visitors were most likely to have interacted with provincial beverage alcohol producers. Craft/microbreweries outpaced wineries and distilleries in terms of visitation.

Nova Scotia Alcohol Producer Visitation
by Trip Purpose

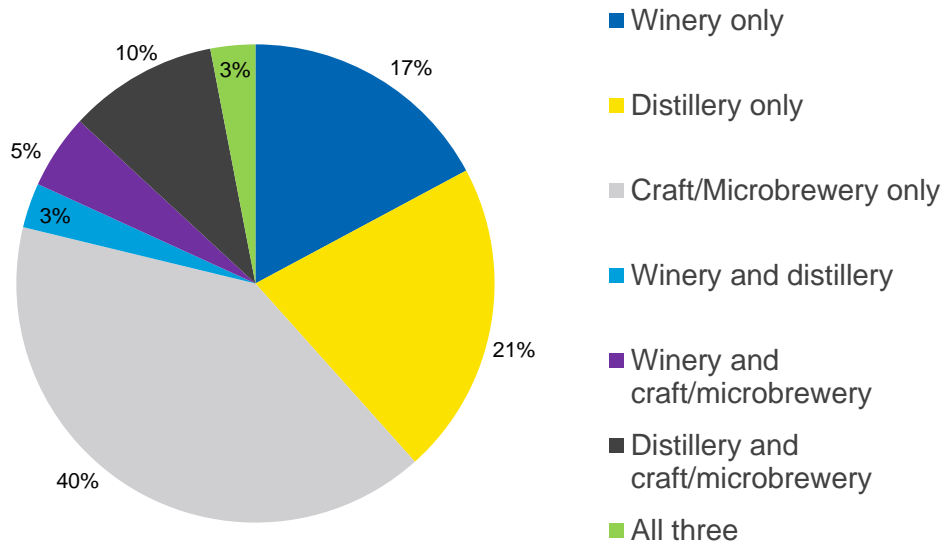


Source: Table N3

ATTRACTIONS, EVENTS AND ACTIVITIES

While some visitors visited more than one type of alcohol producer, most tended to focus on a single type of alcohol. Among those who visited an alcohol producer, four in ten visited craft/microbreweries only, two in ten visited craft/microbreweries only, two in ten visited wineries only, and close to two in ten visited wineries only. Two in ten visited more than one type of alcohol producer.

Type of Alcohol Producer Visited
Among Those Who Reported Visiting at Least One

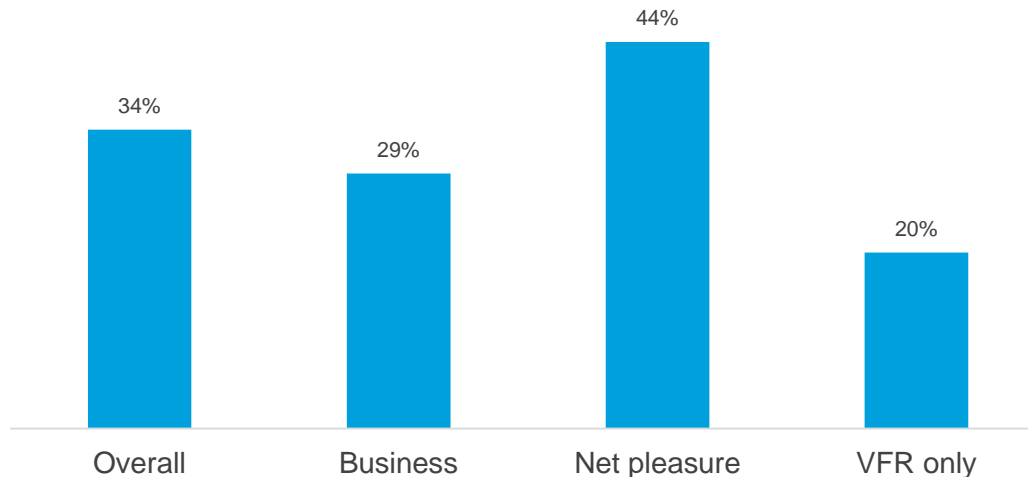


Source: Table N3

LOBSTER

The importance of Nova Scotia as a seafood destination was confirmed in the 2015 Visitor Exit Survey. Among pleasure visitors, over four in ten indicated they or someone in their travel party ate lobster during their Nova Scotia visit. Three in ten business visitors and two in ten VFR visitors enjoyed lobster during their Nova Scotia visit. Notably, approximately two-thirds of first-time visitors to Nova Scotia (65%) ate lobster while in the province.

Percentage of Visitor Parties That Ate Lobster
by Trip Purpose

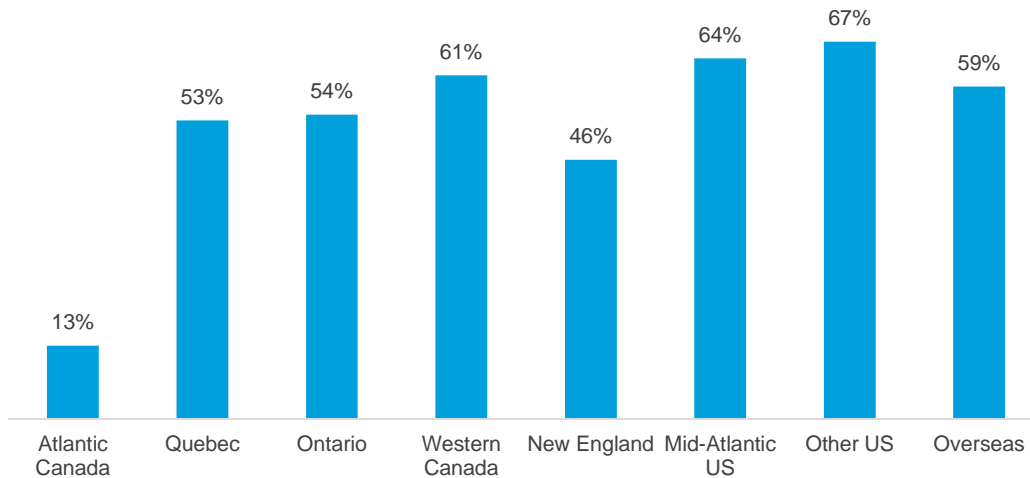


Source: Table N5

LOBSTER

Lobster was most likely to be eaten by pleasure visitors from market regions outside of Atlantic Canada.

Percentage of Net Pleasure Parties
That Ate Lobster
by Market Region



Source: Table N5

SATISFACTION

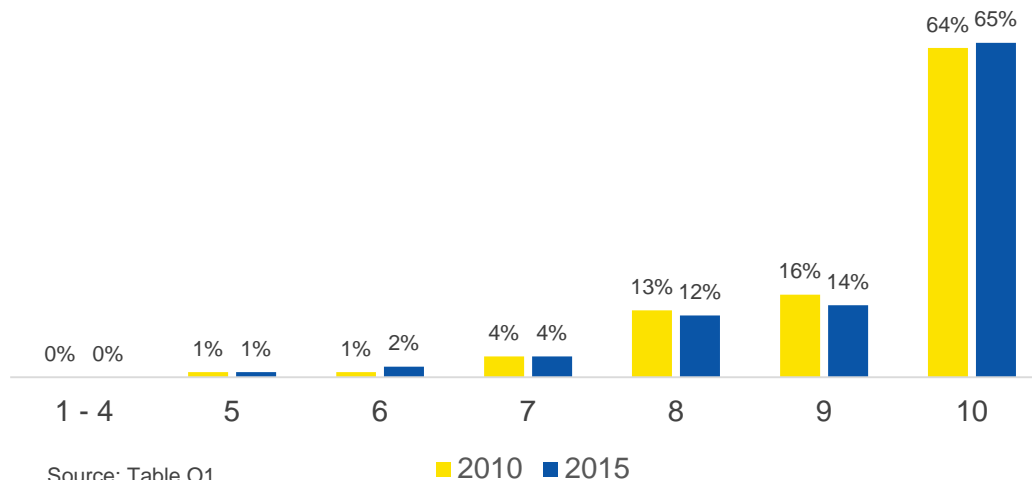


SATISFACTION WITH NOVA SCOTIA

Similar to 2010 results, visitors to Nova Scotia in 2015 were highly satisfied with their Nova Scotia experience. Looking at likelihood to recommend Nova Scotia, two-thirds offered the highest rating of '10', while one-quarter offered ratings of '8' or '9'.

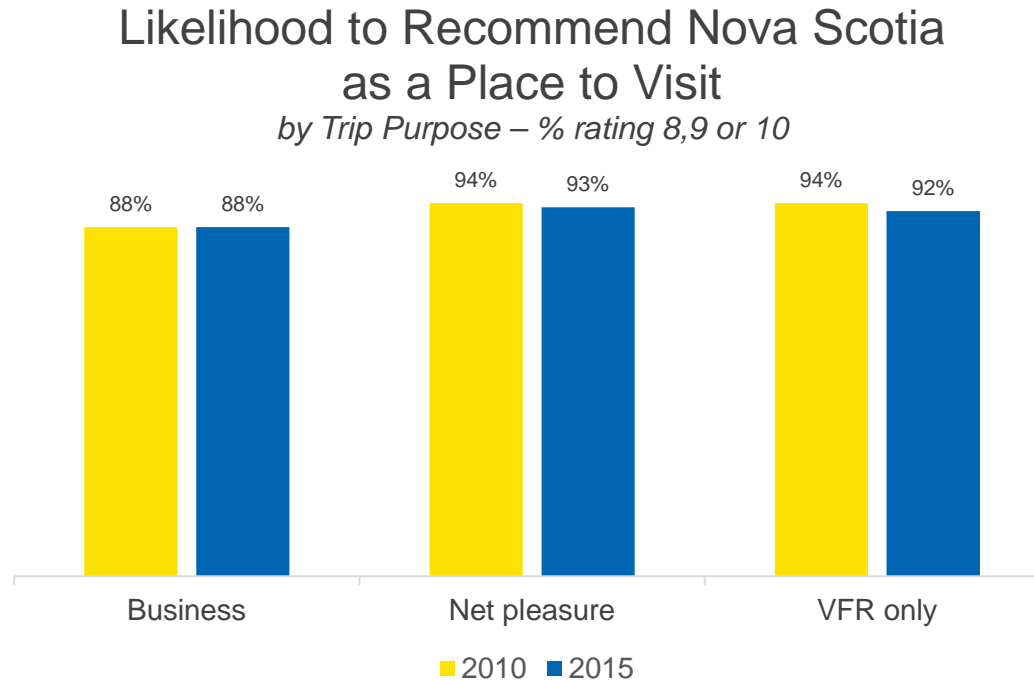
Likelihood to Recommend Nova Scotia as a Place to Visit

*Scale from 1 (Definitely would not recommend) to 10
(Definitely would recommend)*



SATISFACTION WITH NOVA SCOTIA

Likelihood of recommending Nova Scotia was high across the various reasons for visiting the province.

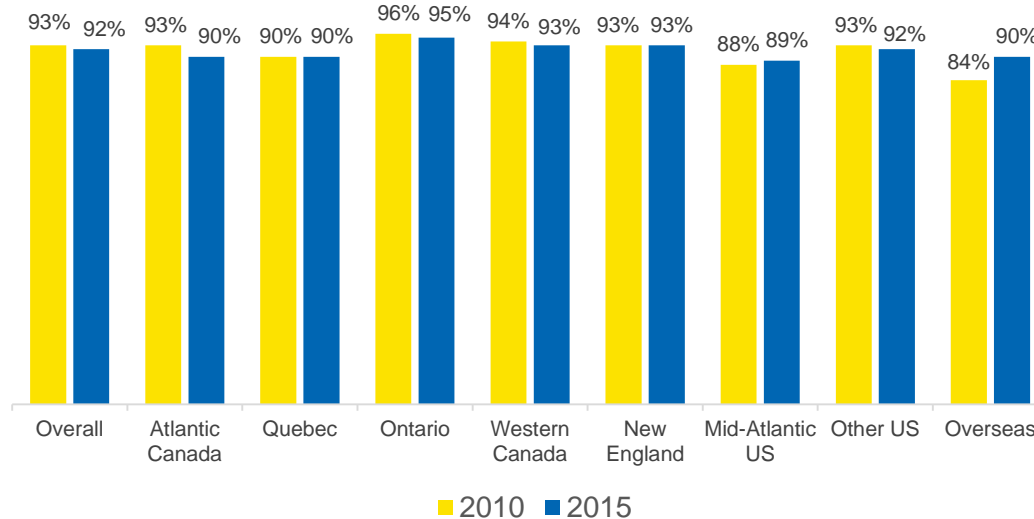


Source: Table O1

SATISFACTION WITH NOVA SCOTIA

Likelihood of recommending Nova Scotia was high across all markets.

Likelihood to Recommend Nova Scotia
as a Place to Visit
by Market Region – % rating 8,9 or 10

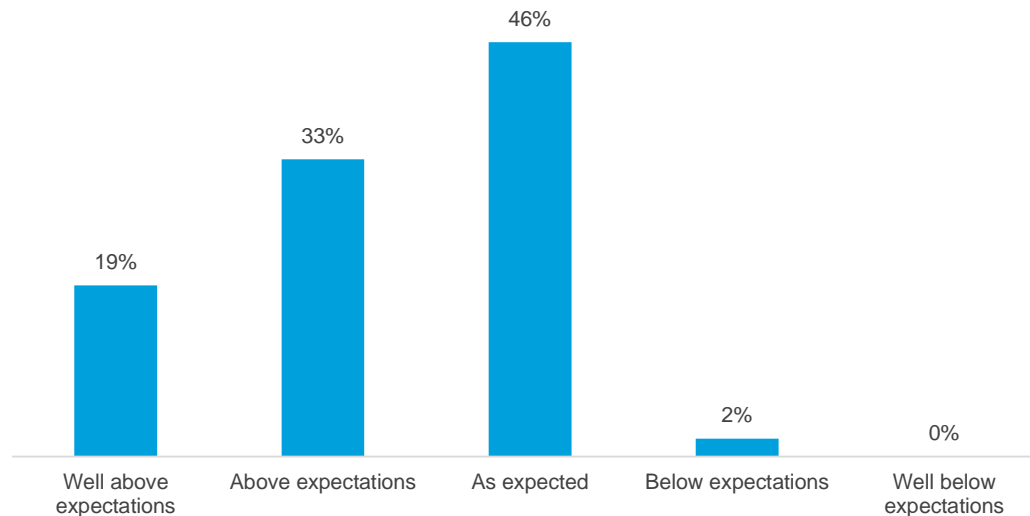


Source: Table O1

SATISFACTION WITH NOVA SCOTIA

Consistent with their high levels of satisfaction, approximately one-half of visitors indicated their Nova Scotia visit exceeded their expectations, while close to one-half had their expectations met. Only a very small percentage of visitors stated their expectations were not met.

Nova Scotia Trip Compared with
Expectations
Among All Visitors

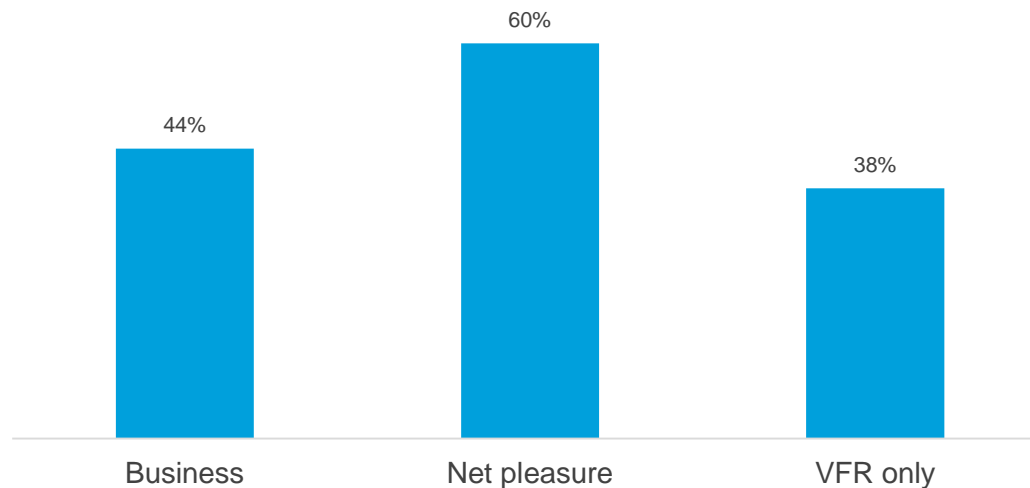


Source: Table O5

SATISFACTION WITH NOVA SCOTIA

Pleasure visitors were most likely to indicate their Nova Scotia visit exceeded their expectations.

Nova Scotia Trip was Above or Well Above Expectations *by Trip Purpose*

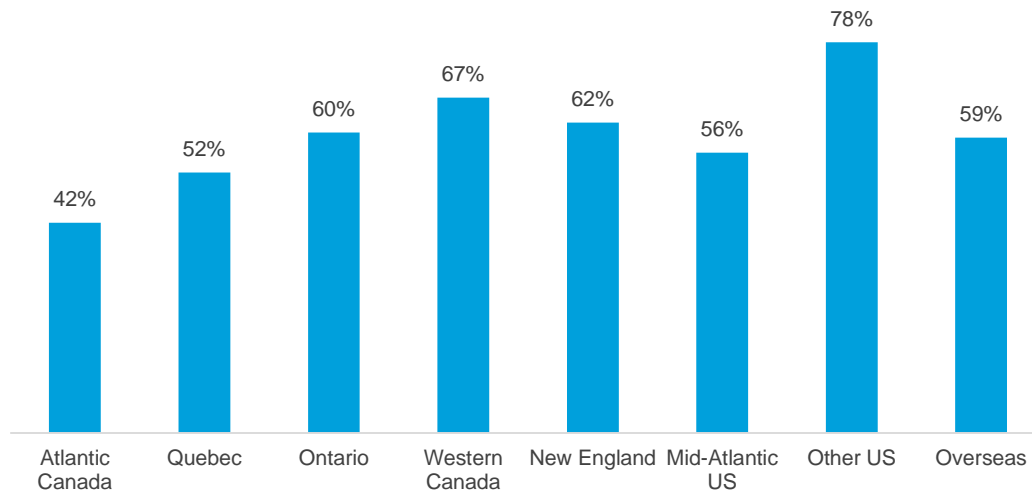


Source: Table O5

SATISFACTION WITH NOVA SCOTIA

The incidence of indicating that the Nova Scotia visit exceeded expectations was high across all regions.

Nova Scotia Trip was Above or Well Above Expectations *by Market Region*



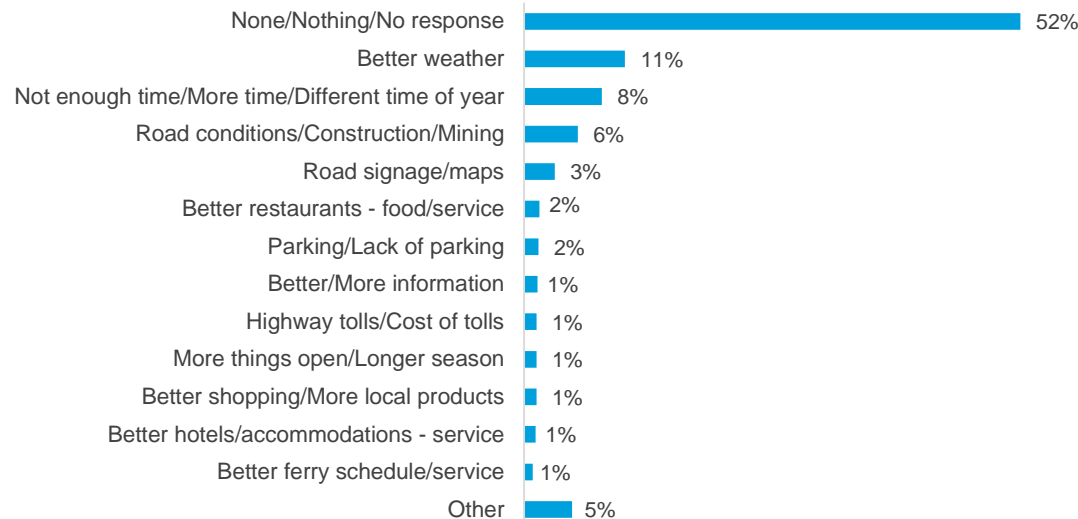
Source: Table O5

OPPORTUNITIES FOR IMPROVEMENT

When asked about areas for improvement to the Nova Scotia visit experience, there were few categories that could be addressed by Tourism Nova Scotia or industry partners. One-half of visitors had no answer or said nothing could be improved. Weather, trip timing/length, road conditions/ construction were the most common mentions.

Opportunities for Improving Nova Scotia Experience

Among All Visitors



Source: Table O6

TRIP PLANNING

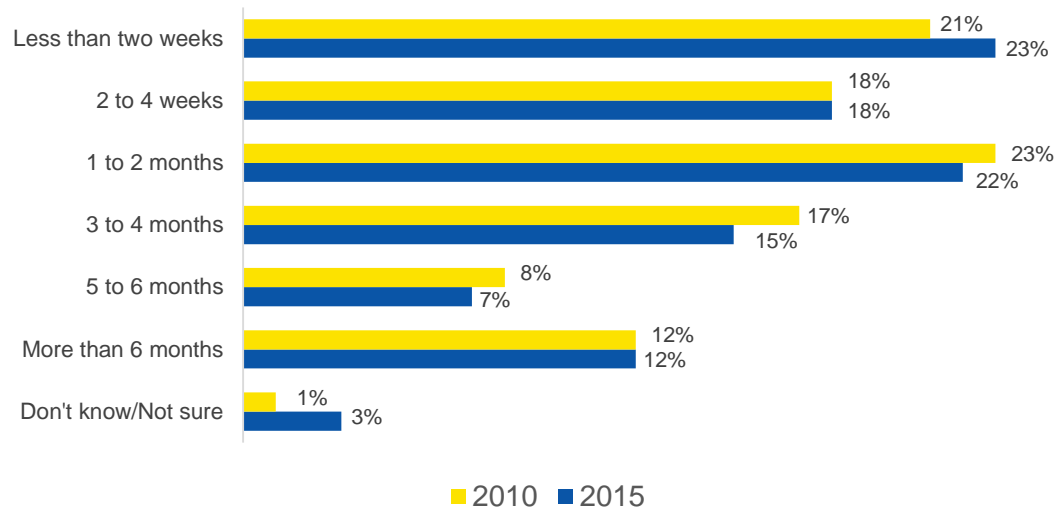


TRIP PLANNING

Between 2010 and 2015, there were minimal changes in when visitors made their decision to visit Nova Scotia.

How Far in Advance Decision Was Made to Visit

Among Those Responsible for Decision



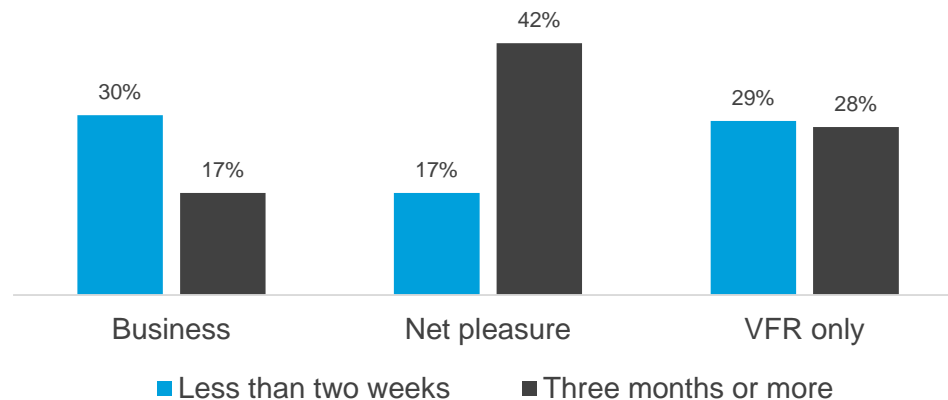
Source: Table T5

TRIP PLANNING

Pleasure visitors had a longer planning cycle compared with business and VFR visitors. For example, four in ten pleasure visitors made their decision to visit Nova Scotia at least three months prior to their trip, compared with three in ten VFR visitors and close to two in ten business visitors.

How Far in Advance Decision Was Made to Visit

by Trip Purpose – Among Those Responsible for Decision



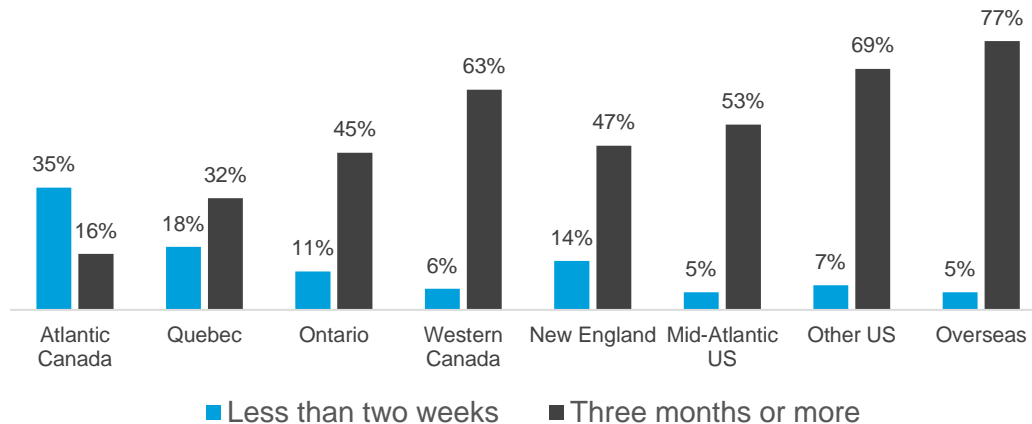
Source: Table T5

TRIP PLANNING

The overall trend with trip planning, in terms of visitor origin, is that the farther away from Nova Scotia one lives, the earlier one makes the decision to visit Nova Scotia. For example, nearly eight in ten international visitors made their decision to visit Nova Scotia three months or more prior to their trip, compared with less than two in ten visitors from Atlantic Canada.

How Far in Advance Decision Was Made to Visit

by Market Region – Among Those Responsible for Decision

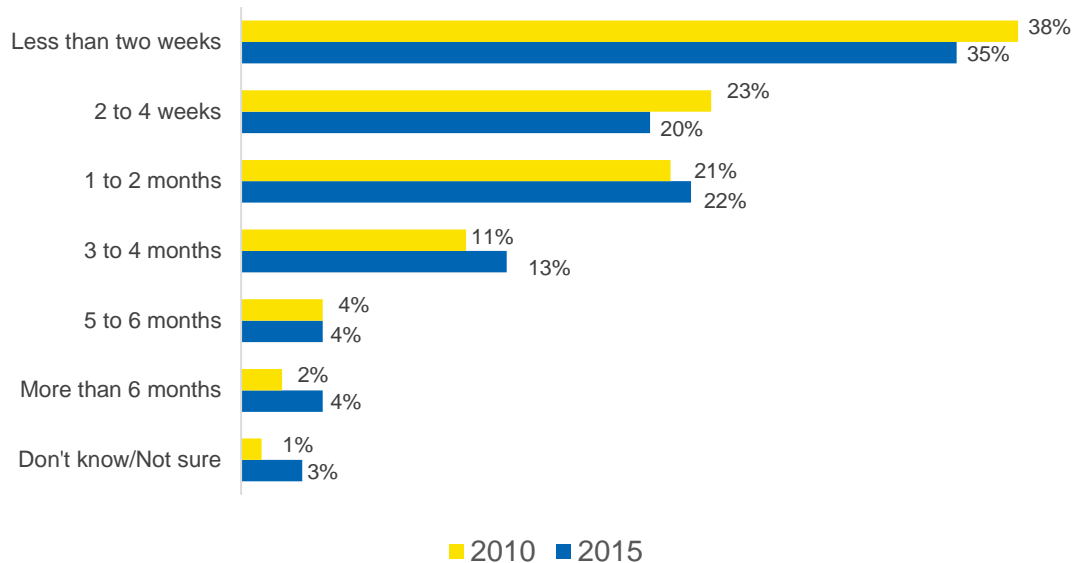


Source: Table T5

BOOKING TRAVEL

Comparing 2015 and 2010, there was minimal change in visitor behaviour in terms of how far in advance the first booking was made for their trip to Nova Scotia.

How Far in Advance First Booking Made *Among Those Who Made Bookings*

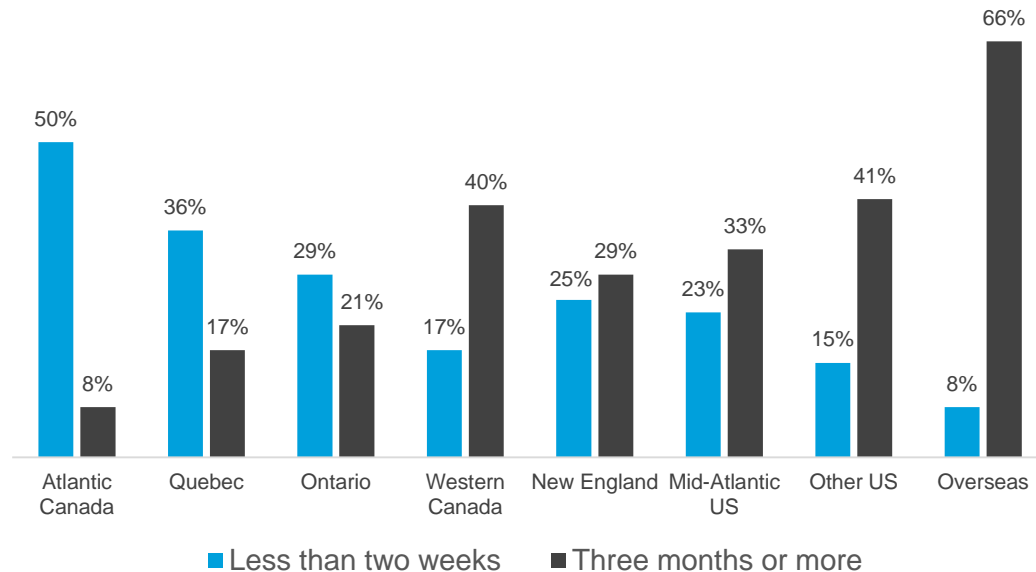


Source: Table T6

DECISION TO TRAVEL

Similar to trip planning behaviour, the overall trend with trip bookings, in terms of visitor origin, is that the farther away from Nova Scotia one lives, the earlier one makes a booking for the trip.

How Far in Advance First Booking Made
by Market Region – Among Those who Made Bookings

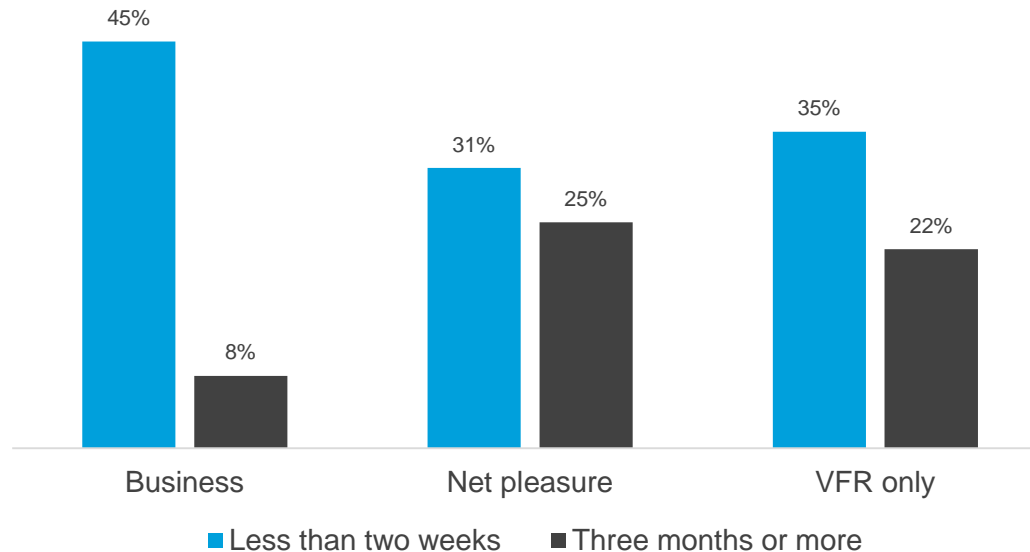


Source: Table T6

DECISION TO TRAVEL

Notably, while pleasure visitors tended to make their decision to visit Nova Scotia earlier than VFR or business visitors, they were similar to VFR visitors in terms of when they made their first booking. Business visitors had the shortest booking cycle.

How Far in Advance First Booking Made
by Trip Purpose – Among Those who Made Bookings

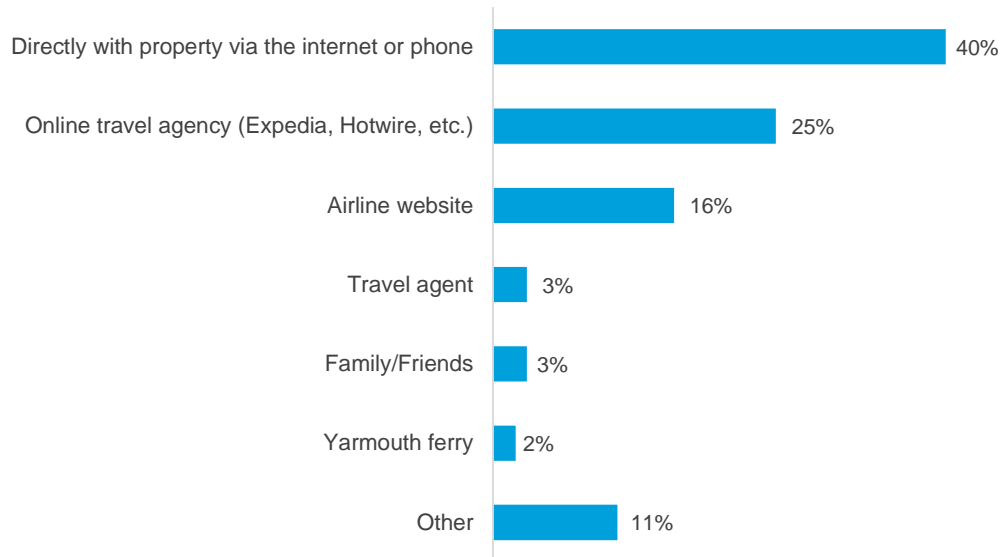


Source: Table T6

BOOKING TRAVEL

A significant minority of visitors made their first booking directly with the operator. Notably, one-quarter used an online travel agency (OTA).

How First Booking Made *Among Net Pleasure Visitors who Made Bookings*

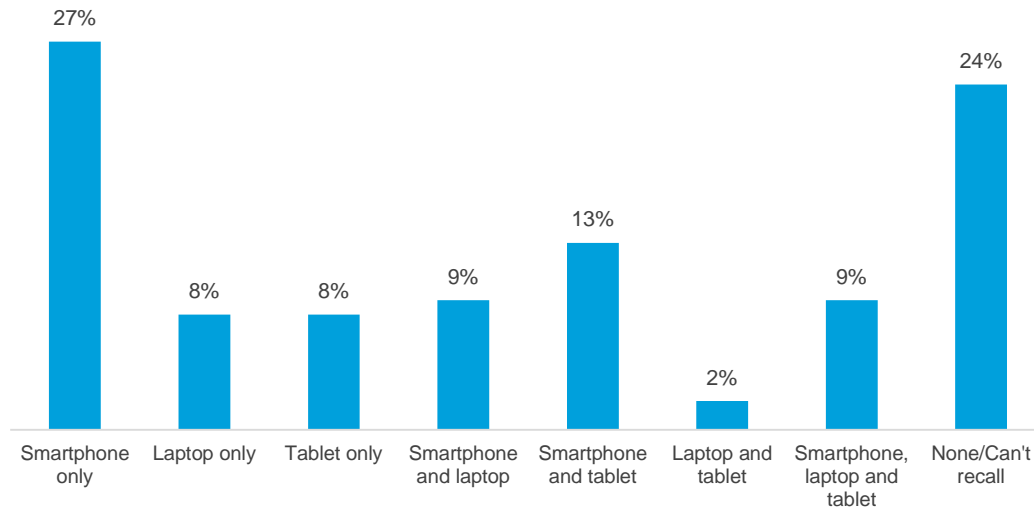


Source: Table T7

PERSONAL ELECTRONIC DEVICES

Three-quarters of visitors reported using an internet enabled electronic device such as a smartphone, laptop, or tablet while on their Nova Scotia visit. The most common device used was a smartphone.

Type of Personal Electronic Device
Used
for Finding Information About Nova Scotia

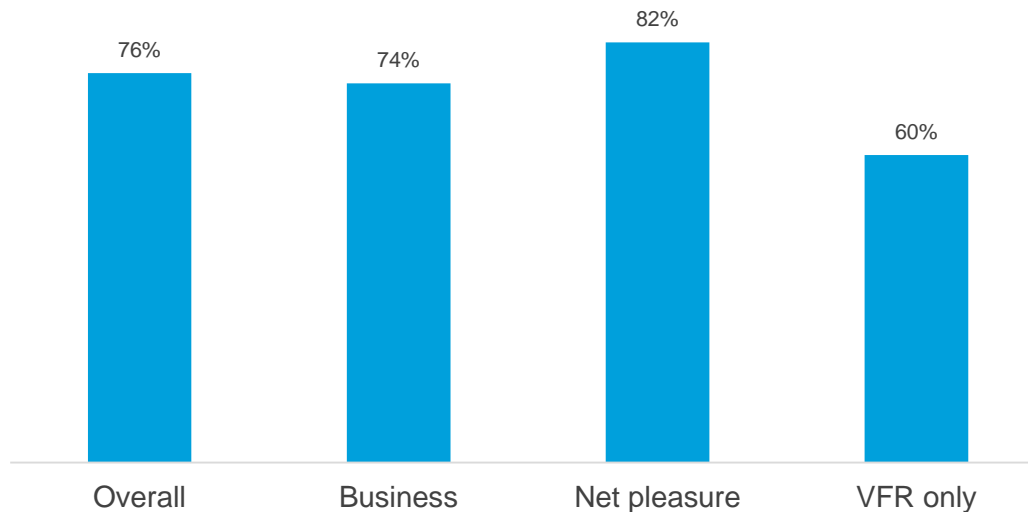


Source: Table T8

PERSONAL ELECTRONIC DEVICES

Pleasure visitors were most likely, while VFR only visitors were least likely, to have used an internet enabled electronic device.

Used a Personal Electronic Device for Finding Information About Nova Scotia *by Trip Purpose*

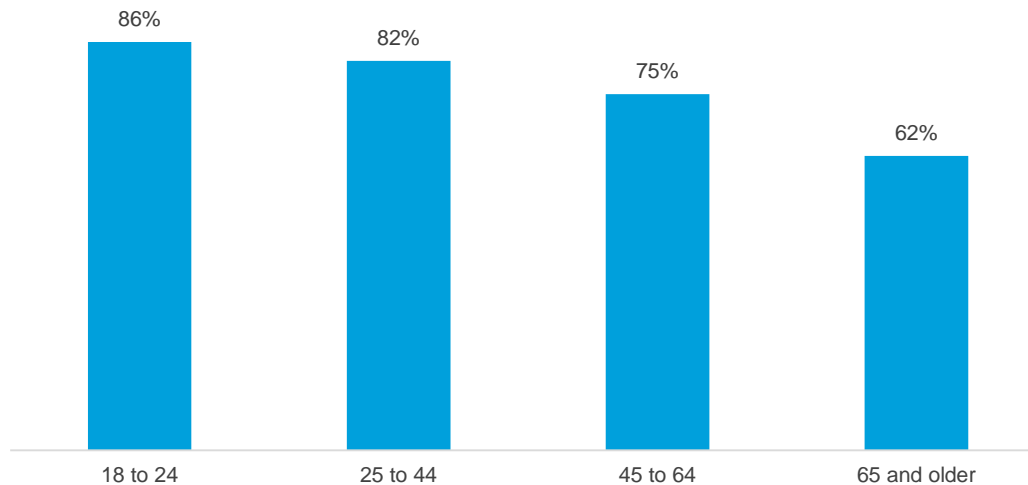


Special Data Run; Source: Table T8

PERSONAL ELECTRONIC DEVICES

Not surprisingly, younger visitors were most likely to use an electronic device, although use of electronic devices among older visitors was also high.

Used a Personal Electronic Device for
Finding Information About Nova Scotia
by Respondent Age



Special Data Run; Source: Table T8

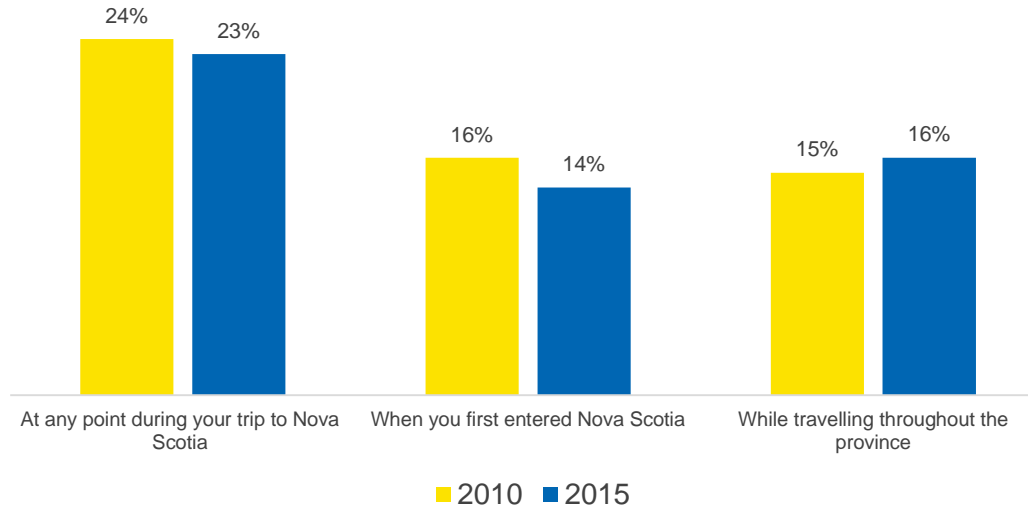
VISITOR INFORMATION CENTRES



VISITOR INFORMATION CENTRES

The incidence of stopping at a Visitor Information Centre (VIC) in 2015 was similar to 2010 results. Notably, more than one-half (54%) of first-time visitors to Nova Scotia reported stopping at a VIC at some point during their Nova Scotia visit.

Visited a Visitor Information Centre *Among All Visitors*

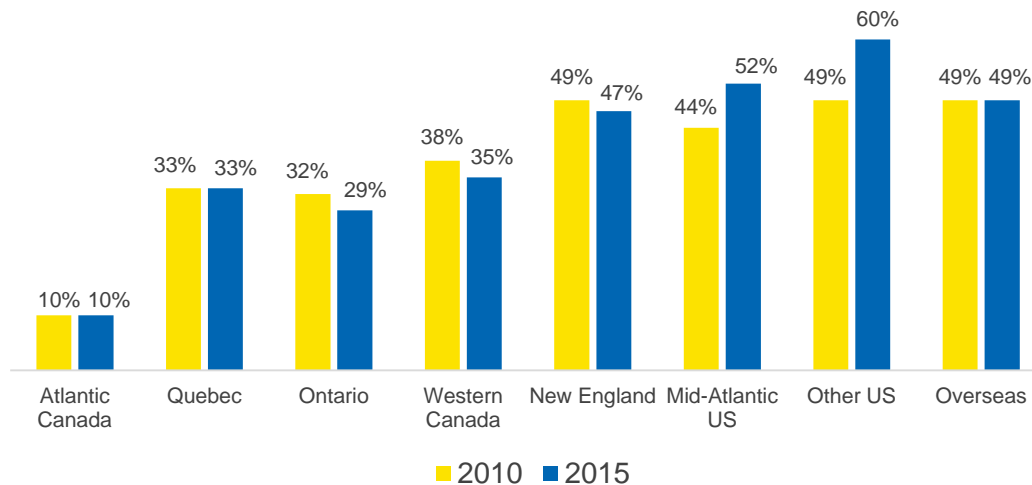


Source: Table T9

VISITOR INFORMATION CENTRES

In general, visitors who travelled longer distances to get to Nova Scotia were most likely to have stopped at a Visitor Information Centre.

Visited a Visitor Information Centre at Any Time During Trip *by Market Region*

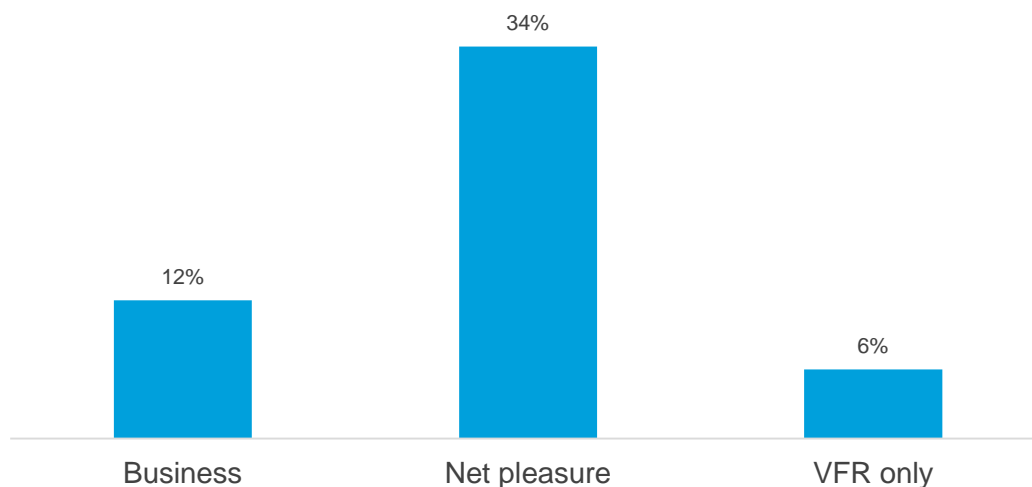


Source: Table T9

VISITOR INFORMATION CENTRES

Pleasure visitors were much more likely than business or VFR visitors to have stopped at a Visitor Information Centre during their trip to Nova Scotia.

Visited a Visitor Information Centre at
Any Time During Trip
by Trip Purpose



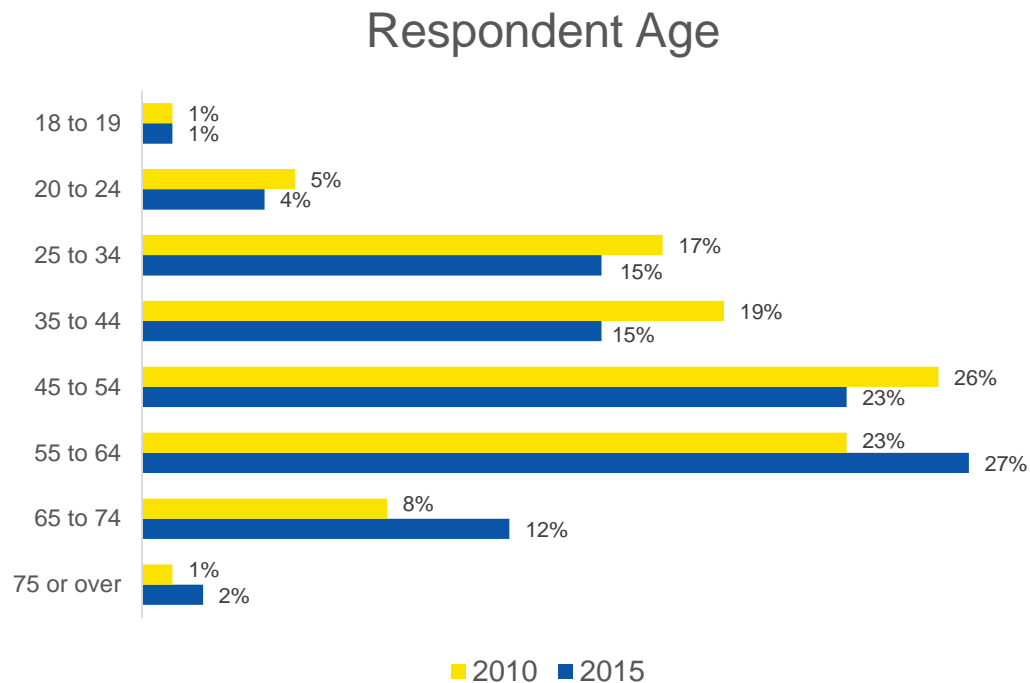
Source: Table T9

DEMOGRAPHICS



AGE

The single largest age group among survey respondents were those aged 55 to 64. Four in ten respondents were aged 55 or older.

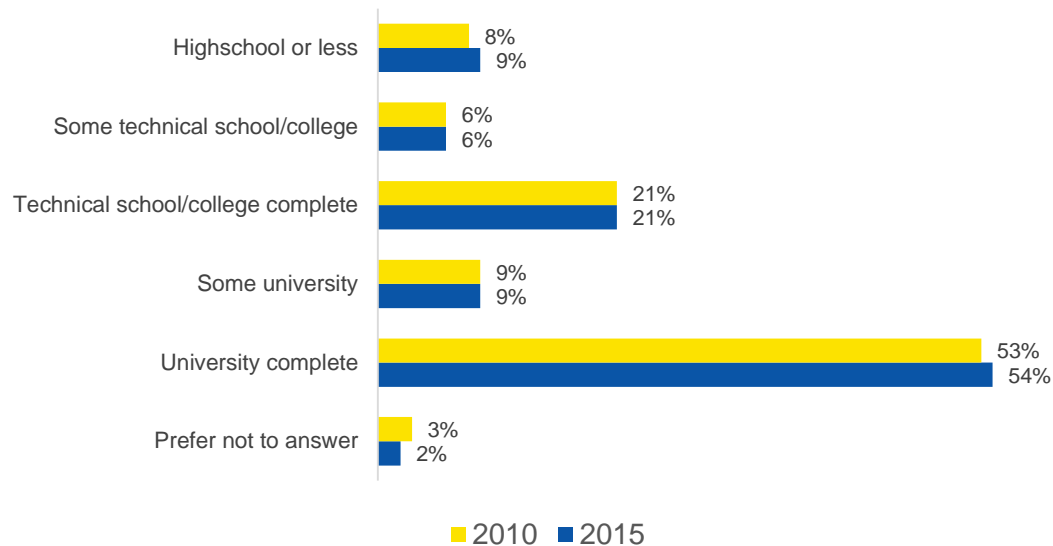


Source: Table V2

EDUCATION

The majority of travel parties included at least one member that had completed university.

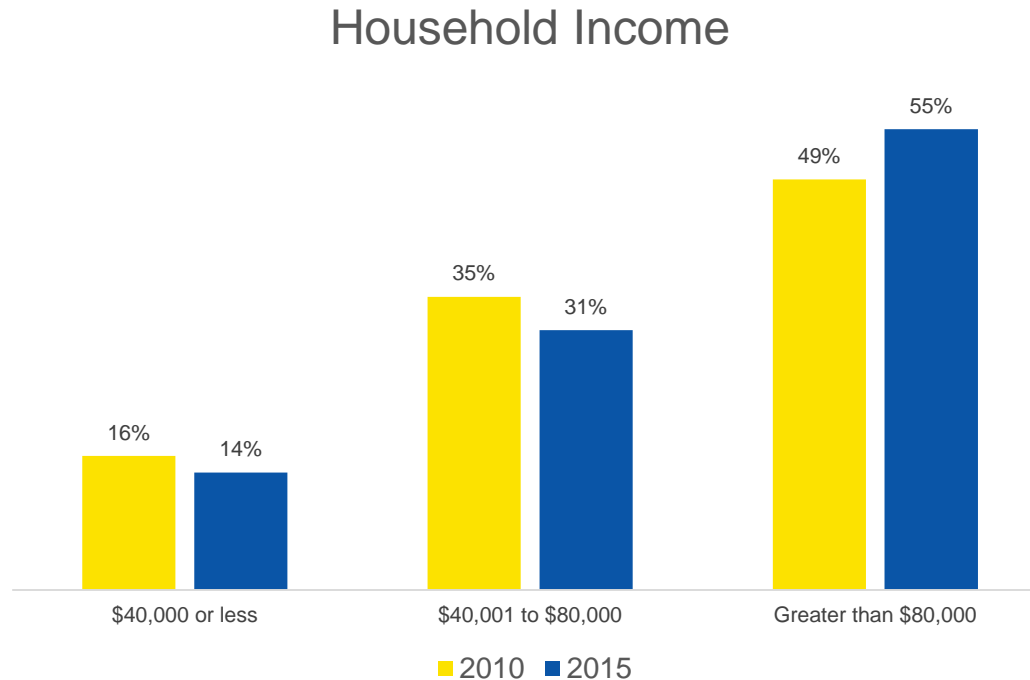
Highest Level of Education in Household in Visiting Party



Source: Table V4

HOUSEHOLD INCOME

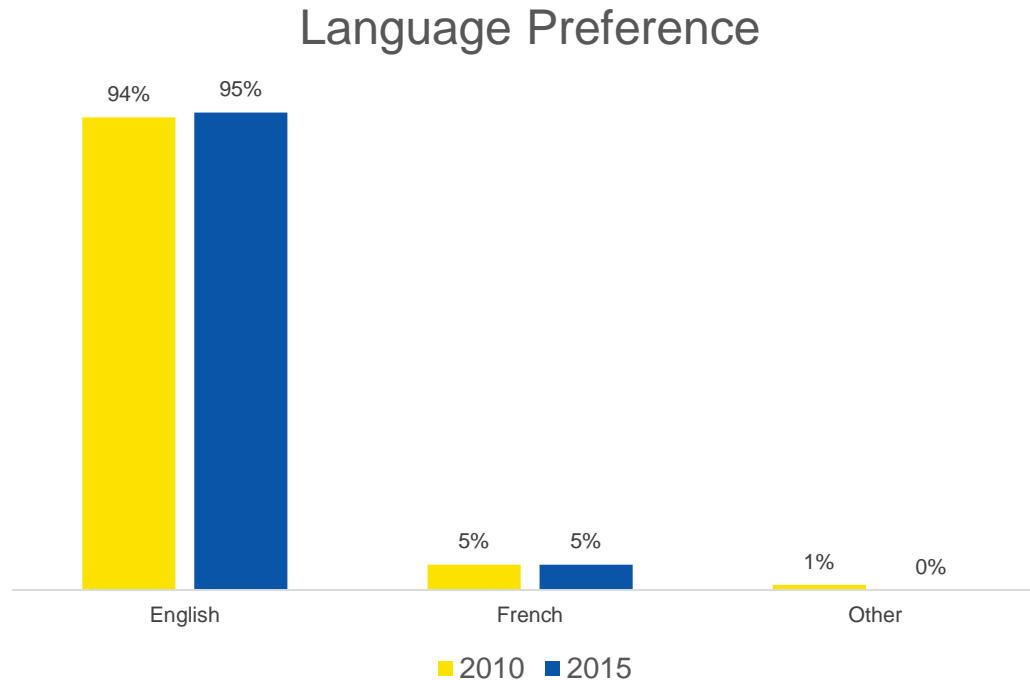
The majority of visitors to Nova Scotia reported household incomes higher than \$80,000.



Source: Table V5/V6

LANGUAGE PREFERENCE

The overwhelming majority of visitors to Nova Scotia prefer to be served in English. This is consistent across all market regions except Quebec, where 35% of visitors would prefer to be served in French.

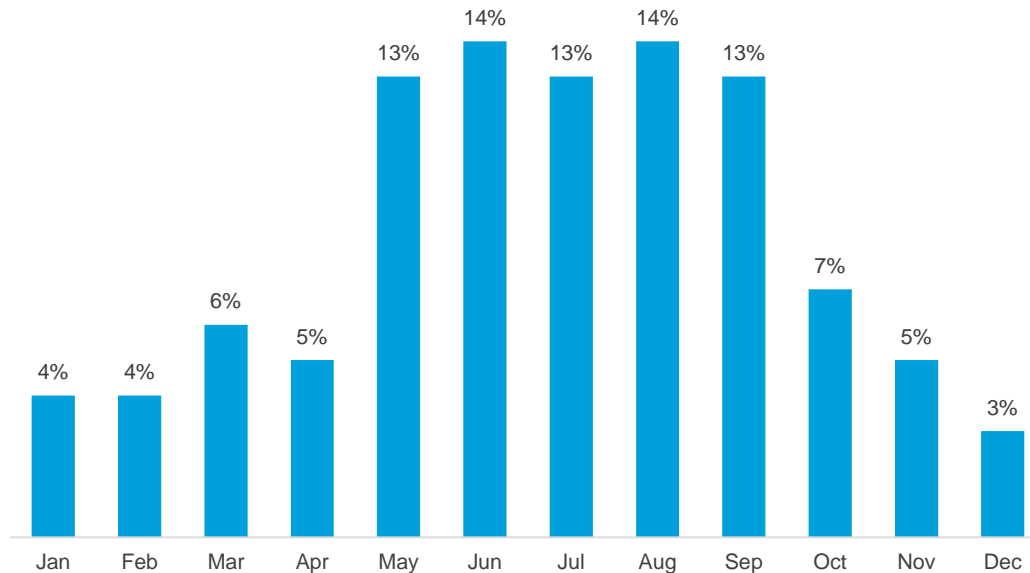


Source: Table T11

TIME OF VISIT

Visits to Nova Scotia were spread throughout the year, and over one-half of survey respondents visited the province between June and September.

Date of Departure From Nova Scotia

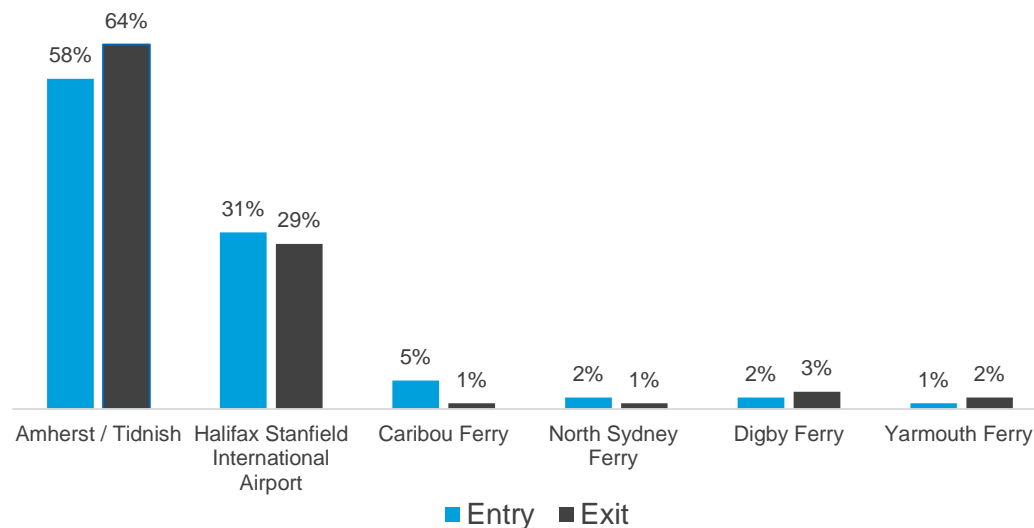


Source: Table A7

ENTRY/EXIT

Close to two-thirds of survey respondents arrived in Nova Scotia via New Brunswick, while three in ten arrived via the Halifax Stanfield International Airport. Exit patterns were virtually the same.

Entry and Exit Points During Trip to Nova Scotia



Source: Table A5/A8

COMMUNITY VISITATION



COMMUNITY VISITATION

The following tables indicate how many visitors to the province stopped or stayed in each community or tourism region during their stay. In particular, the tables show the percentage of all travel parties that stopped or stayed in a specific community (i.e., stopped for at least 30 minutes, or overnight), the percentage of all parties that stopped in a particular community (i.e., stopped for at least 30 minutes but not overnight), and the percentage that stayed overnight in a specific community. The tables also display the average number of nights spent in each community among those who stayed overnight, as well as the capture rate, or the percentage of parties who stopped in a specific community compared to those who were within the region.

It should be noted that capture rate values are not adjusted for the size of the region; comparative analysis of capture rates within a particular region is fine, however, analysis between regions of different sizes is not recommended due to the variance in geographic region.

COMMUNITY VISITATION

Bay of Fundy and Annapolis Valley Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Bay of Fundy and Annapolis Valley	38%	28%	22%	4.0	
Advocate Harbour	0%	0%	0%	3.5	1%
Annapolis Royal	4%	3%	1%	3.5	11%
Berwick	3%	2%	1%	4.8	7%
Blomidon	2%	2%	0%	2.6	5%
Bridgetown	1%	1%	0%	4.1	3%
Brookfield	1%	1%	0%	3.1	3%
Digby	7%	4%	3%	2.1	17%
Five Islands	1%	1%	0%	2.1	3%
Grand Pré	3%	3%	0%	3.1	8%
Greenwood	1%	1%	0%	2.9	2%
Halls Harbour	1%	1%	0%	7.0	2%
Hantsport	1%	1%	0%	6.7	2%
Joggins	1%	1%	0%	1.0	2%
Kejimikujik National Park	1%	1%	0%	2.9	2%
Kentville	5%	4%	2%	4.5	14%
Kingston	1%	0%	0%	3.4	2%
Masstown	3%	3%	0%	1.0	7%
Middleton	2%	2%	1%	6.1	6%
Noel	1%	0%	0%	2.3	1%
Parrsboro	1%	1%	0%	1.6	3%
Port Royal	1%	1%	0%	1.7	3%
South Rawdon	0%	0%	0%	1.2	1%
Springhill	1%	1%	0%	2.4	2%
Stewiacke	2%	1%	0%	2.2	5%
Truro	15%	9%	7%	2.6	40%
Walton	0%	0%	0%		1%
Westport	1%	1%	0%	1.7	3%
Weymouth	0%	0%	0%	5.6	1%
Windsor	4%	3%	1%	3.6	10%
Wolfville	8%	6%	3%	3.1	21%

COMMUNITY VISITATION

South Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
South Shore	29%	25%	13%	4.8	
Bridgewater	5%	4%	2%	4.0	18%
Caledonia	0%	0%	0%	3.8	1%
Chester	6%	5%	1%	4.6	21%
Hubbards	1%	0%	0%	9.2	2%
Kejimikujik Seaside Adjunct	0%	0%	0%	1.7	2%
LaHave	2%	2%	0%	6.2	7%
Liverpool	3%	2%	1%	3.3	9%
Lunenburg	16%	13%	4%	2.8	55%
Mahone Bay	10%	9%	1%	3.4	35%
New Germany	1%	0%	0%	5.8	2%
New Ross	1%	0%	0%	1.8	2%
Peggy's Cove	16%	15%	1%	2.9	54%
Shelburne	2%	2%	1%	6.7	8%

COMMUNITY VISITATION

Halifax Metro Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Halifax Metro	74%	32%	66%	3.4	
Bedford	13%	8%	5%	4.1	17%
Dartmouth	25%	13%	13%	3.5	34%
Halifax	60%	19%	44%	3.1	82%
Mount Uniacke	1%	1%	0%	3.7	2%
Sackville	8%	5%	3%	3.3	12%

COMMUNITY VISITATION

Eastern Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Eastern Shore	7%	5%	3%	3.7	
Canso	1%	0%	0%	2.1	10%
Guysborough	1%	1%	0%	6.6	13%
Isaacs Harbour	0%	0%	0%	2.5	4%
Liscomb	0%	0%	0%	2.1	7%
Middle Musquodoboit	1%	0%	0%	3.0	10%
Musquodoboit Harbour	2%	2%	1%	4.0	31%
Sheet Harbour	1%	1%	0%	1.6	18%
Sherbrooke	1%	1%	0%	1.7	20%

COMMUNITY VISITATION

Northumberland Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Northumberland Shore	21%	15%	11%	3.7	
Amherst	6%	5%	1%	1.6	31%
Antigonish	7%	4%	3%	3.0	32%
Cape George	1%	1%	0%	16.2	3%
Caribou	2%	1%	0%	5.1	8%
New Glasgow	6%	4%	3%	4.2	31%
Oxford	1%	1%	0%	1.3	7%
Pictou	4%	3%	1%	2.3	19%
Pugwash	1%	1%	0%	1.9	6%
Tatamagouche	2%	2%	1%	3.9	9%
Tidnish	1%	0%	0%	4.5	3%

COMMUNITY VISITATION

Cape Breton Island Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Cape Breton Island	18%	13%	16%	4.1	
Arichat	0%	0%	0%	5.2	2%
Baddeck	7%	4%	4%	2.7	41%
Big Pond	1%	1%	0%	8.0	4%
Cape Breton Highlands National Park	4%	3%	1%	2.8	21%
Cape North	2%	1%	1%	1.3	11%
Chéticamp	6%	4%	3%	1.8	35%
Fourchu	0%	0%	0%	12.7	0%
Glace Bay	1%	1%	0%	5.4	8%
Ingonish	5%	3%	2%	1.9	26%
Inverness	3%	2%	1%	2.9	15%
Iona	0%	0%	0%	1.0	2%
Louisbourg	4%	3%	1%	1.8	23%
Mabou	2%	2%	1%	2.6	13%
Margaree	2%	1%	1%	3.7	10%
New Waterford	1%	0%	0%	2.4	3%
North Sydney	3%	2%	1%	2.9	15%
Pleasant Bay	2%	2%	1%	1.8	13%
Point Michaud	0%	0%	0%	2.9	1%
Port Hastings	2%	1%	1%	1.7	10%
Port Hawkesbury	2%	2%	1%	1.5	14%
Port Hood	1%	0%	0%	5.3	4%
Port Morien	0%	0%	0%		1%
St. Peter's	1%	1%	0%	2.6	7%
Sydney	6%	3%	4%	2.5	32%
Whycocomagh	1%	1%	0%	2.1	6%

COMMUNITY VISITATION

Yarmouth and Acadian Shores Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Yarmouth and Acadian Shores	5%	3%	4%	3.4	
Church Point	1%	1%	0%	4.7	19%
Pubnico	1%	1%	0%	14.4	16%
Yarmouth	4%	2%	3%	2.1	82%