

A scenic photograph of a white and red lighthouse on a rocky shore. In the foreground, several people are kayaking on the water. The sun is low on the horizon, creating a reflection on the water. The sky is a clear blue.

# 2017 NOVA SCOTIA VISITOR EXIT SURVEY

## Overall Results

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# INTRODUCTION

This report presents the results of the 2017 Nova Scotia Visitor Exit Survey (VES) as prepared by research staff at Tourism Nova Scotia. The 2017 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, visitor spend, activities participated in while visiting the province, where visitors travelled within 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 2017 Visitor Exit Survey was administered during the peak season of June to October 2017. The 2017 peak season data was combined with off-peak season data from the 2015 VES so as to provide results across a full 12 months of the year. The 2017 VES report is based on 3,451 questionnaires that were completed by overnight visitors aged 18 years or older who stayed at least one night in Nova Scotia between June 2017 and October 2017 (1,869) and January to May & November to December 2015 (1,582).

Questionnaires were completed using an online survey. Visitors exiting the province through the Halifax Stanfield International Airport, 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.

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

Comparative data from the 2010 and 2015 VES are presented where applicable.

# CONTACT

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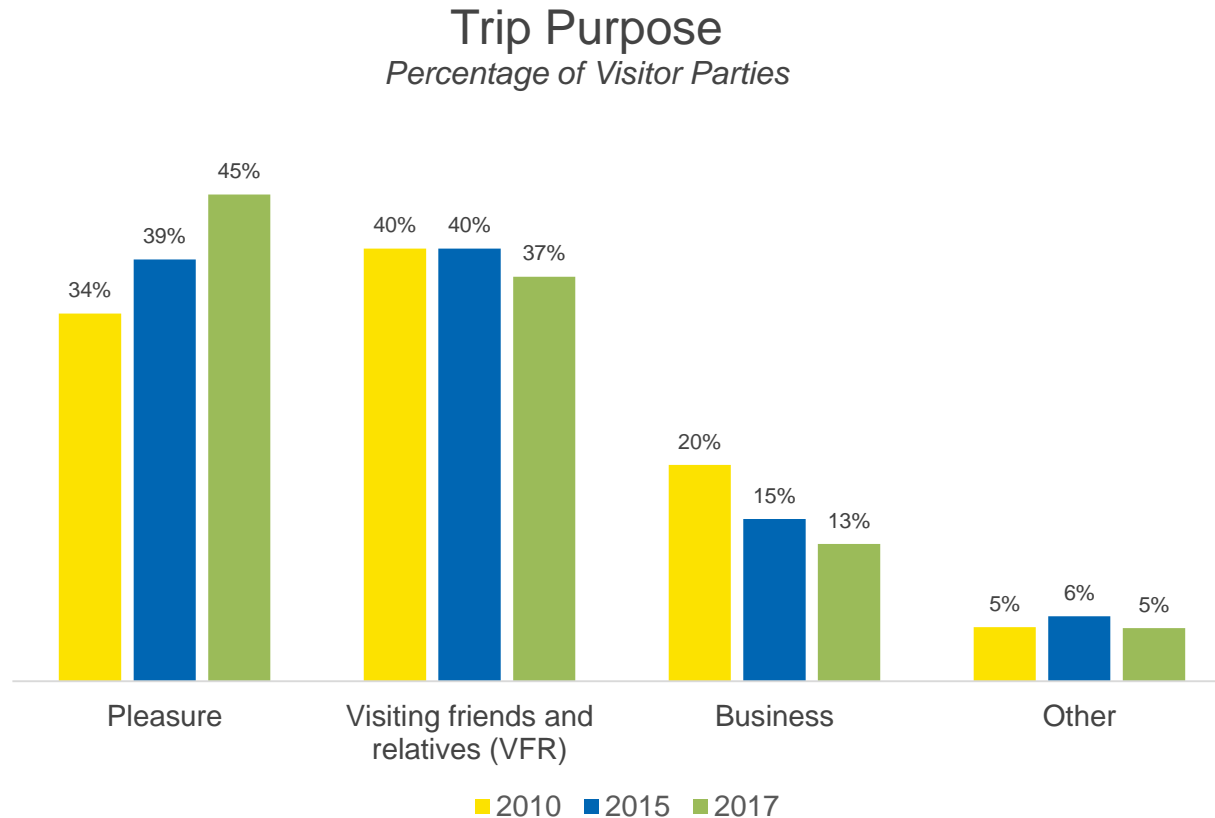


# VISITOR PROFILE

## Trip and Party Characteristics

# TRIP CHARACTERISTICS

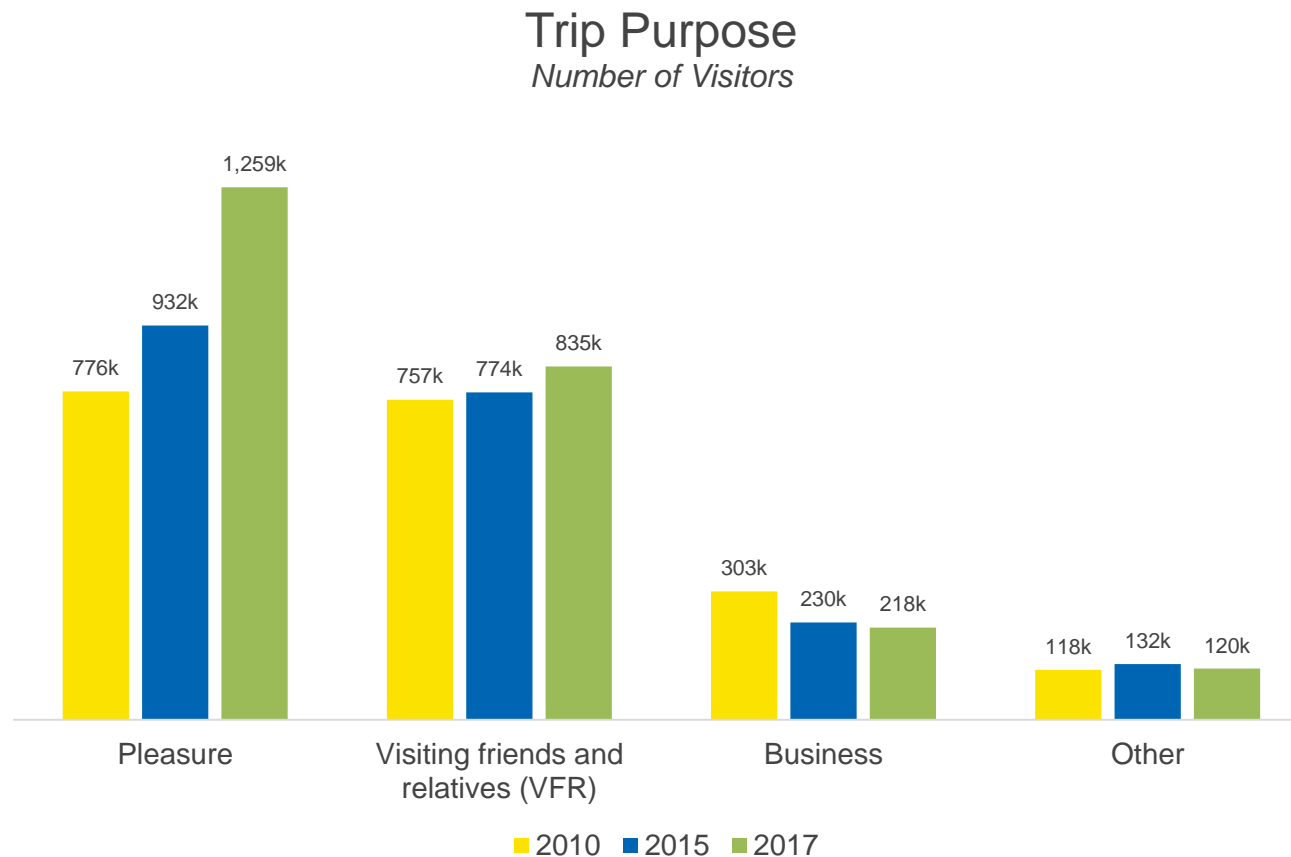
Nova Scotia has experienced strong growth in visitation between 2014 and 2017, with pleasure visitors accounting for much of the growth. Pleasure visitors are now the largest visitor segment, comprising 45% of all visitor parties.



Source: Table D3

# TRIP CHARACTERISTICS

In 2017, for the first time on record, pleasure visitors made up more than half (52%) of Nova Scotia's non-resident visitor population.



Source: Table D3

# TRIP CHARACTERISTICS

In comparison to 2015, there was an increase in the proportion of pleasure visitor parties from all markets with the exception of Other US. In six out of eight markets (Quebec, Western Canada, New England Mid-Atlantic US, Other US and Overseas), pleasure visitors are the largest visitor segment.

Trip Purpose by Market Region									
	Pleasure			VFR*			Business		
	2010	2015	2017	2010	2015	2017	2010	2015	2017
Atlantic Canada	31%	32%	37%	39%	40%	38%	23%	18%	16%
Quebec	35%	44%	53%	33%	36%	30%	30%	20%	15%
Ontario	31%	38%	45%	48%	48%	44%	18%	13%	10%
Western Canada	36%	39%	53%	45%	45%	37%	17%	14%	9%
New England	50%	66%	71%	37%	26%	22%	10%	6%	6%
Mid-Atlantic US	58%	58%	68%	21%	32%	21%	18%	9%	10%
Other US	55%	72%	66%	25%	21%	24%	19%	6%	10%
Overseas	38%	56%	58%	45%	36%	35%	13%	7%	4%
Total	34%	39%	45%	40%	40%	37%	20%	15%	13%

Source: 2010, 2015 & 2017 VES  
 \* Visit friends and relatives



# 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 approximately one-half were both visiting family and friends and visiting Nova Scotia for pleasure (49%).

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.

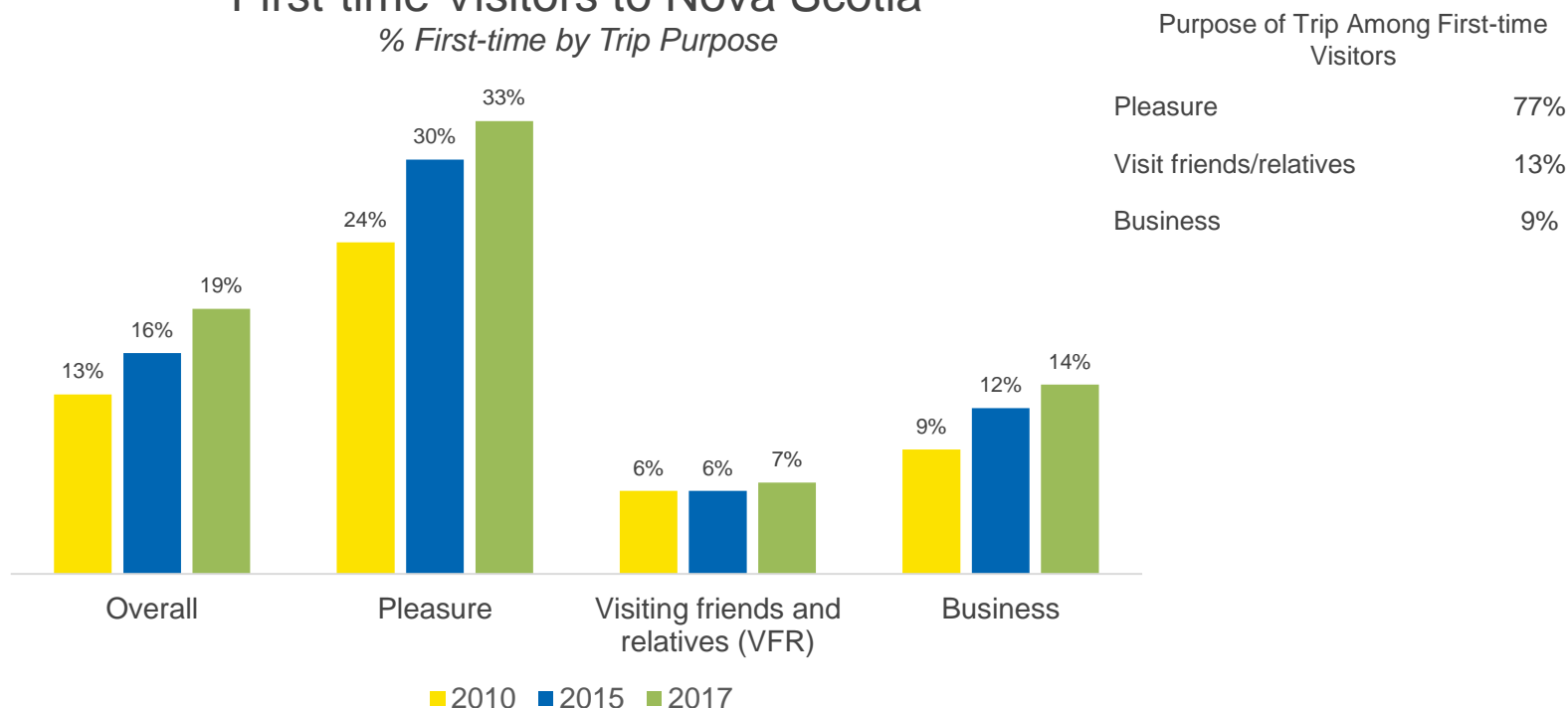
These categories will be used throughout the remainder of this report when referring to trip purpose, unless otherwise noted.

# FIRST-TIME VISITORS

Since 2010 there has been an increasing percentage of visitor parties identifying as first-time visitors to Nova Scotia. This increase in first-time visitors traced primarily to pleasure visitors, and to a lesser extent, to business visitors.

## First-time Visitors to Nova Scotia

*% First-time by Trip Purpose*

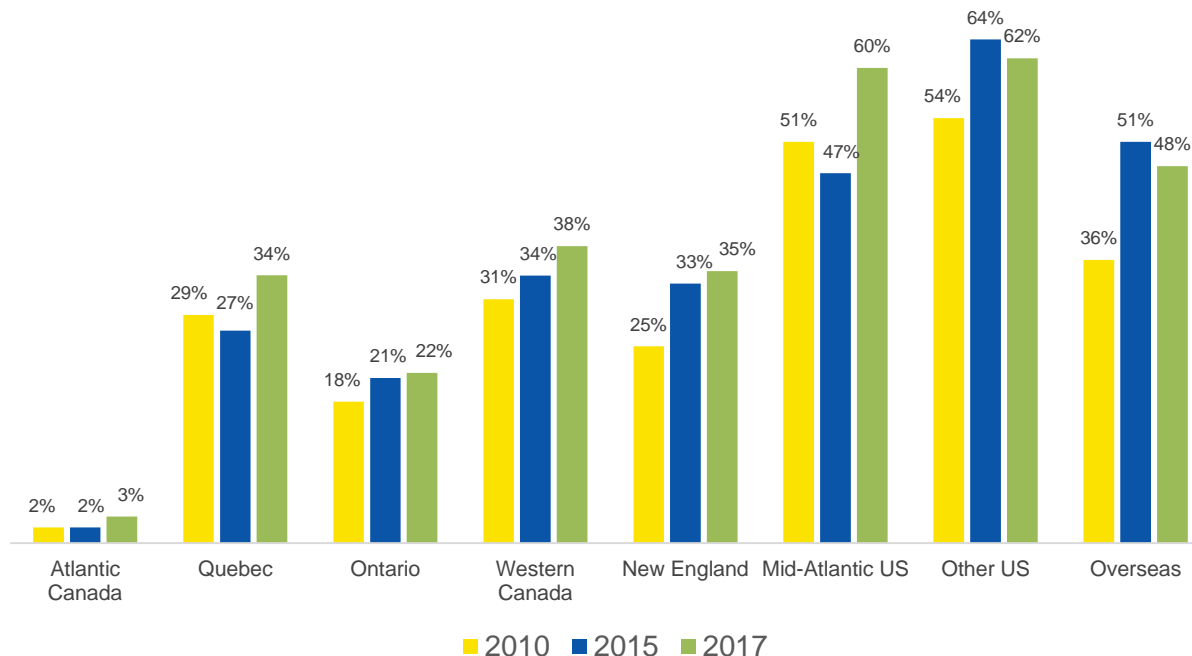


Source: Table T12

# 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. 2017 saw increases in the percentage of first-time visitors from the Mid-Atlantic US, Western Canada and Quebec.

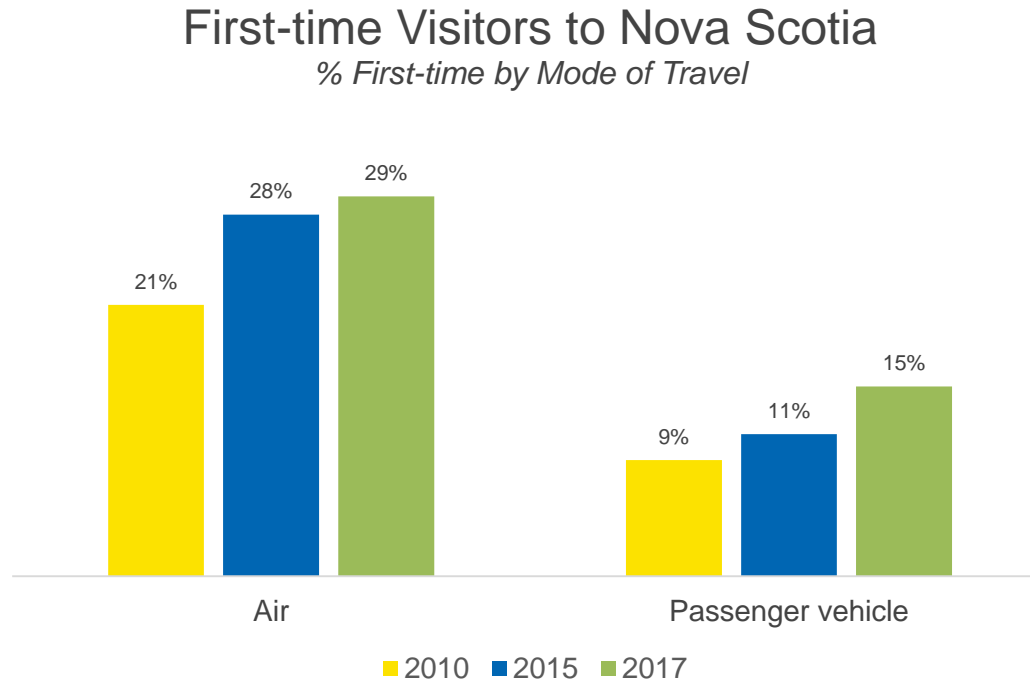
First-time Visitors to Nova Scotia  
*% First-time by Market Region*



Source: Table T12

# FIRST-TIME VISITORS

Air visitors are twice as likely as road visitors to be first-time visitors.

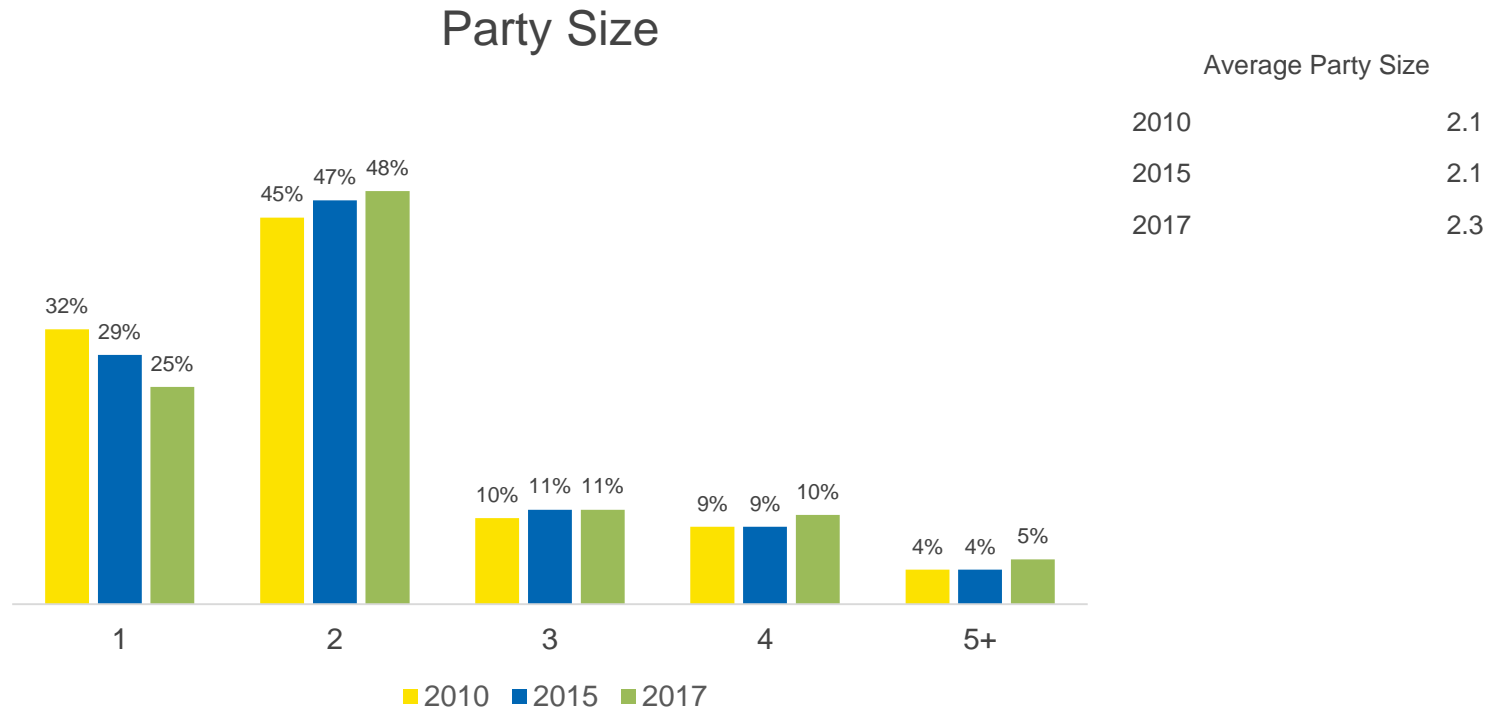


Source: Table T12



# PARTY CHARACTERISTICS

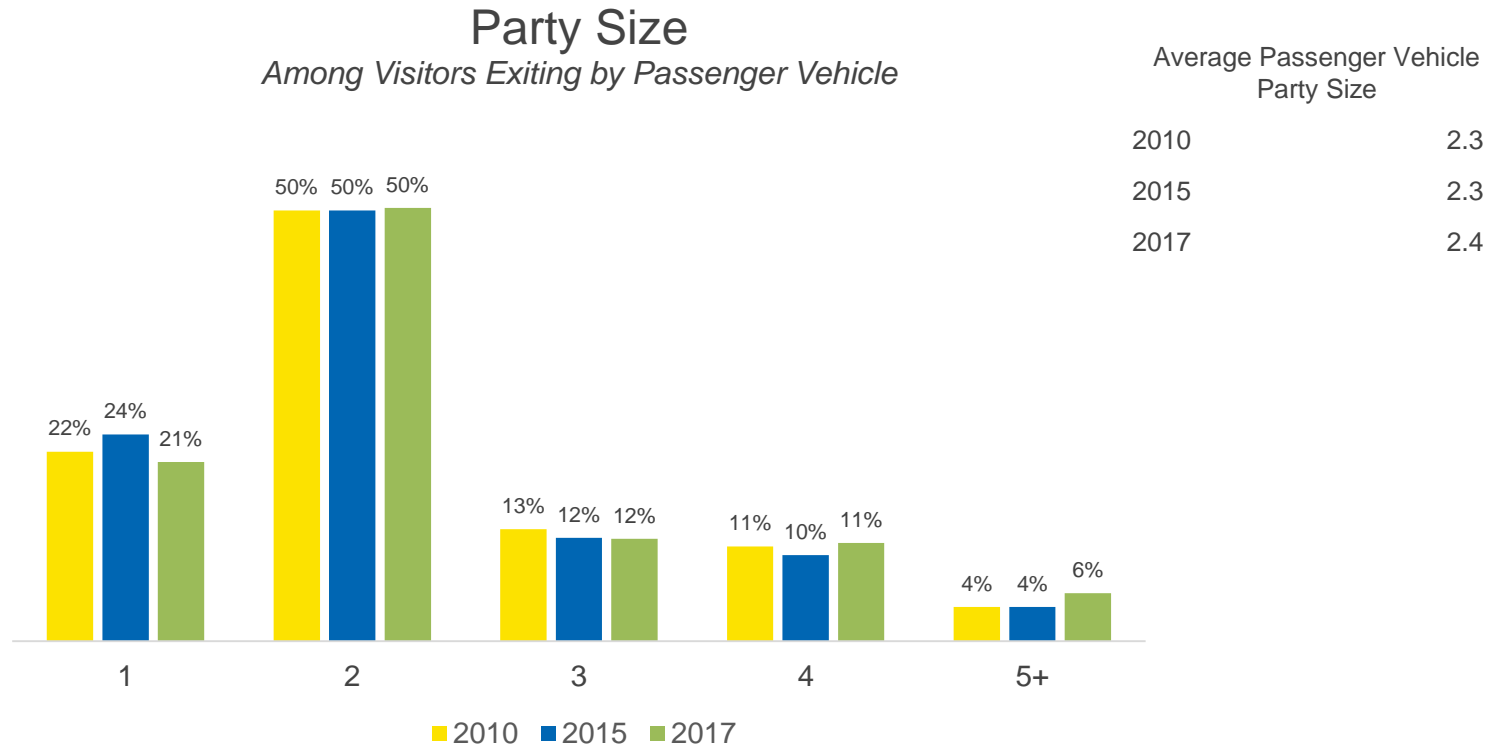
Overall, party sizes in 2017 are very similar to those reported in 2015, with the exception of a decrease in those reporting a party of one, an ongoing trend since 2010. Nearly one-half of all parties visiting Nova Scotia consisted of two people, while one-quarter were individual visitors.



Source: VES 2010 – Table B2/C1; VES 2015 & 2017 - Table C1

# PARTY CHARACTERISTICS

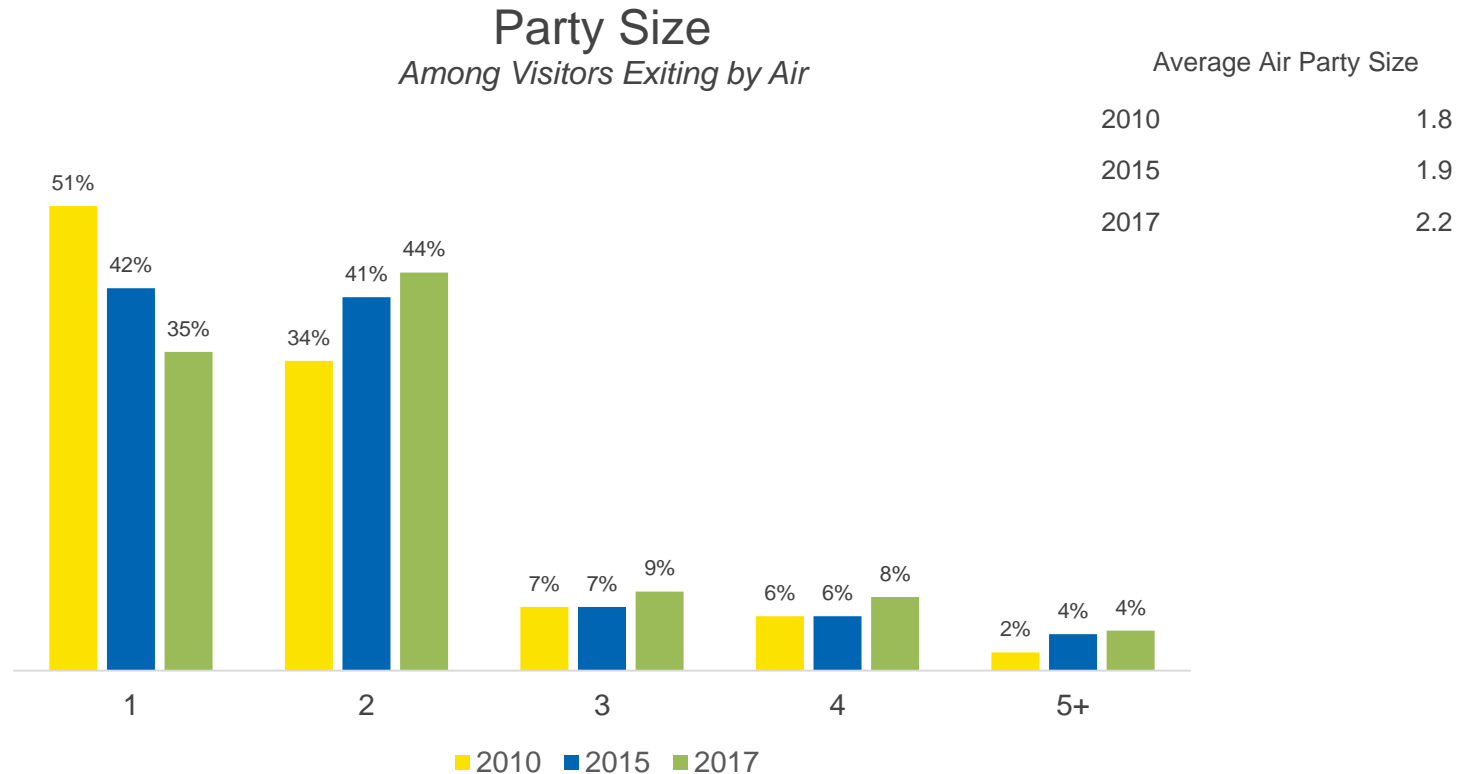
Among visitor parties that exited Nova Scotia via passenger vehicle, there was a slight decrease in the percentage reporting a party of one, otherwise party sizes are similar to those reported in 2015.



Source: VES 2010 – Table B2; VES 2015 & 2017 - Table C1

# PARTY CHARACTERISTICS

Visitor parties exiting by air are increasingly likely to report a party size of two, and less likely to be travelling alone. The average party size is trending upwards, increasing from 1.8 in 2010 to 2.2 in 2017.

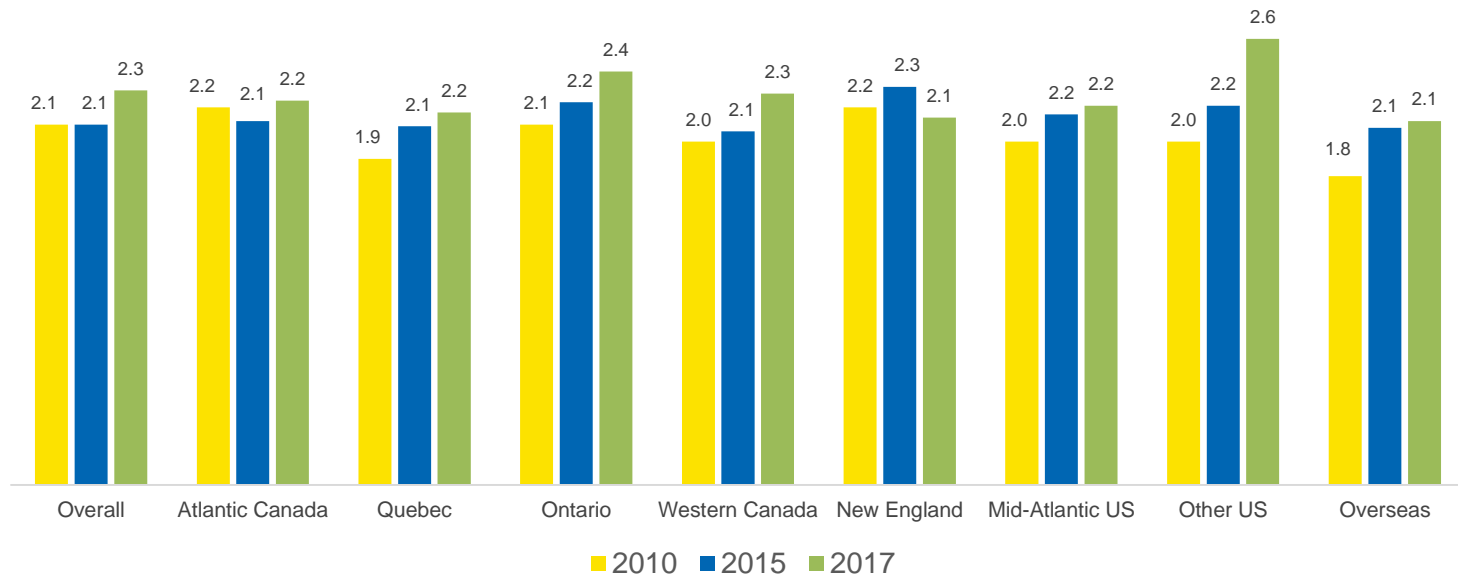


Source: Table C1

# PARTY CHARACTERISTICS

Increases in party size were seen in visitor parties from Ontario, Western Canada and Other US. These were offset by a decreases in average party size among visitors from New England.

Average Party Size  
*by Market Region*

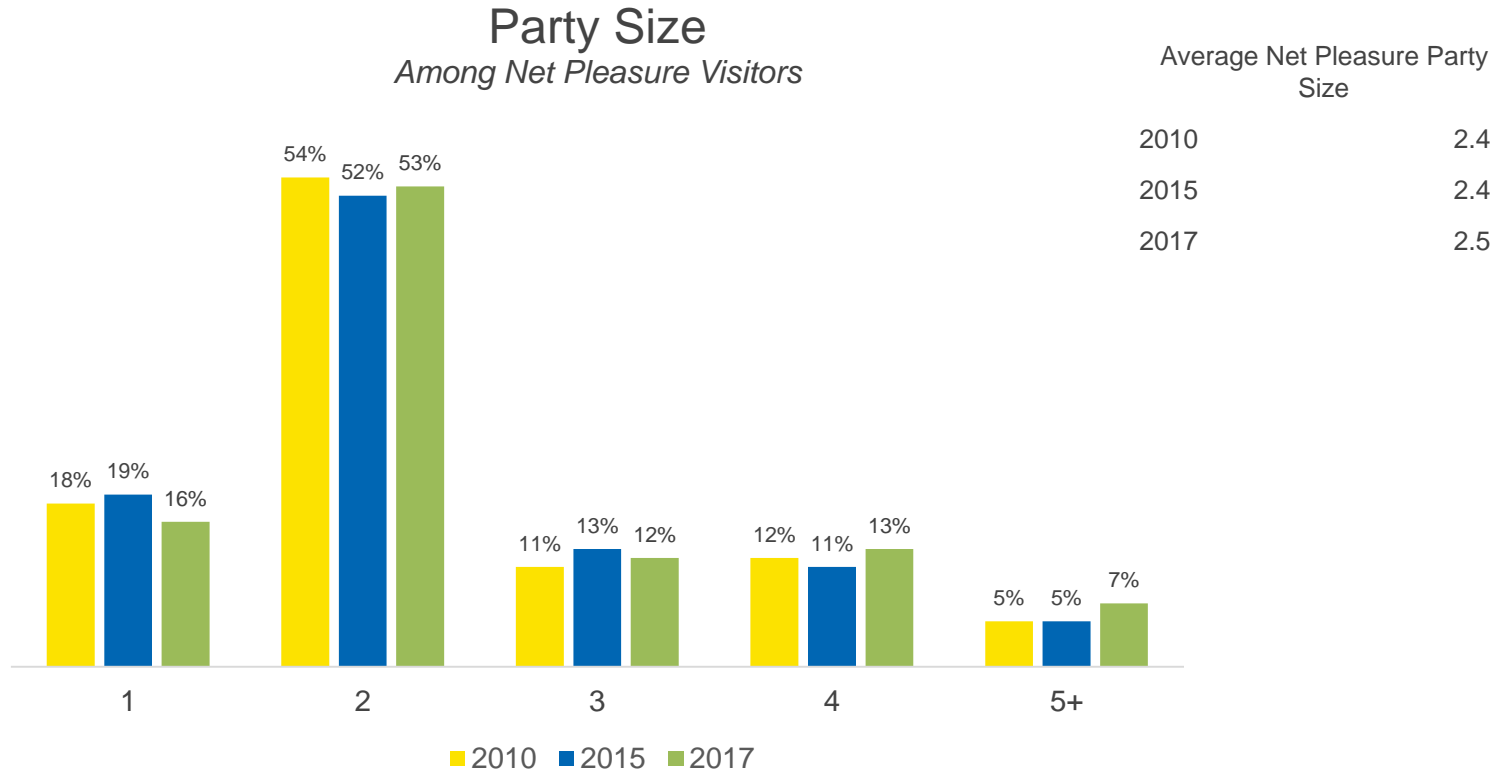


Source: VES 2010 – Table B2/C1; VES 2015 & 2017 - Table C1



# PARTY CHARACTERISTICS

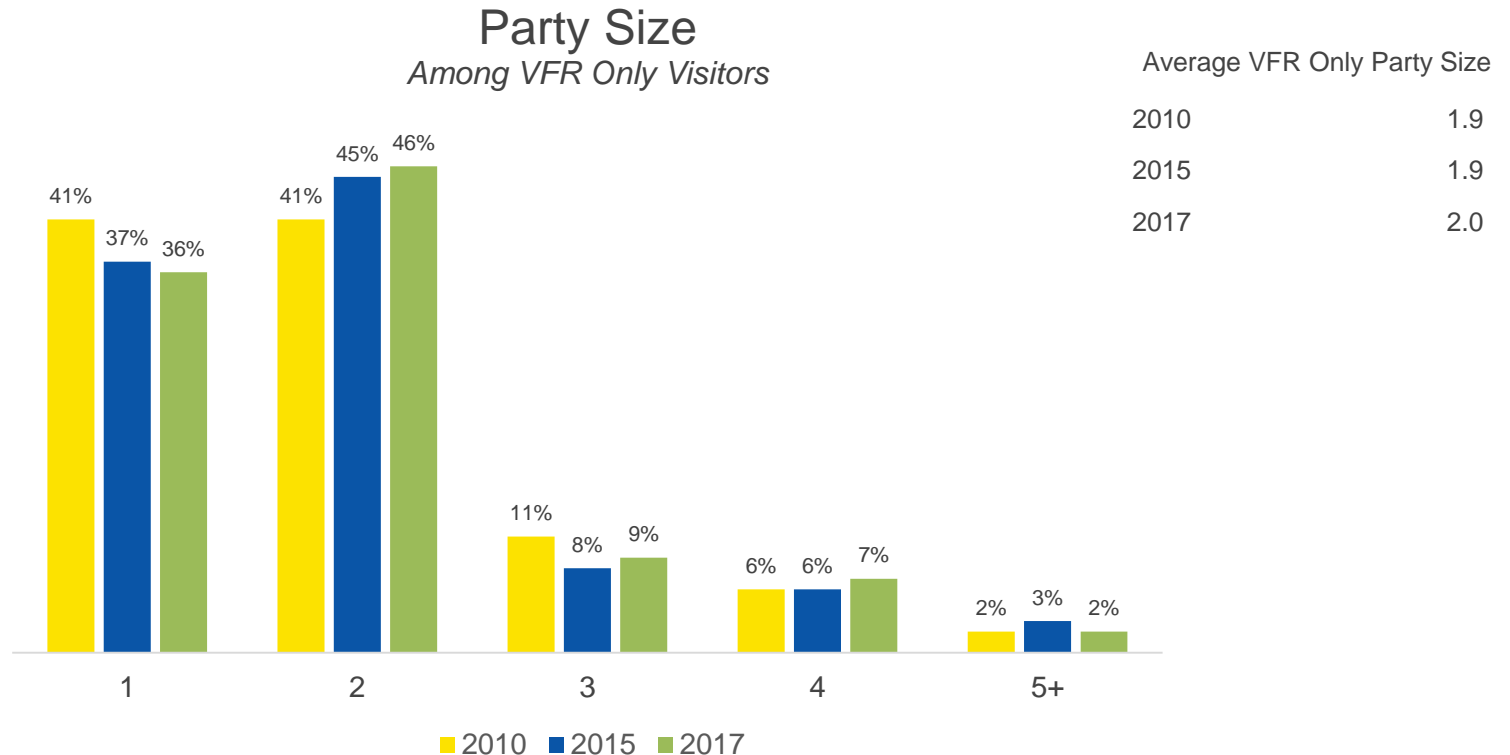
Party sizes among pleasure visitors in 2017 are generally consistent with previous years.



Source: VES 2010 – Table B2; VES 2015 & 2017 - Table C1

# PARTY CHARACTERISTICS

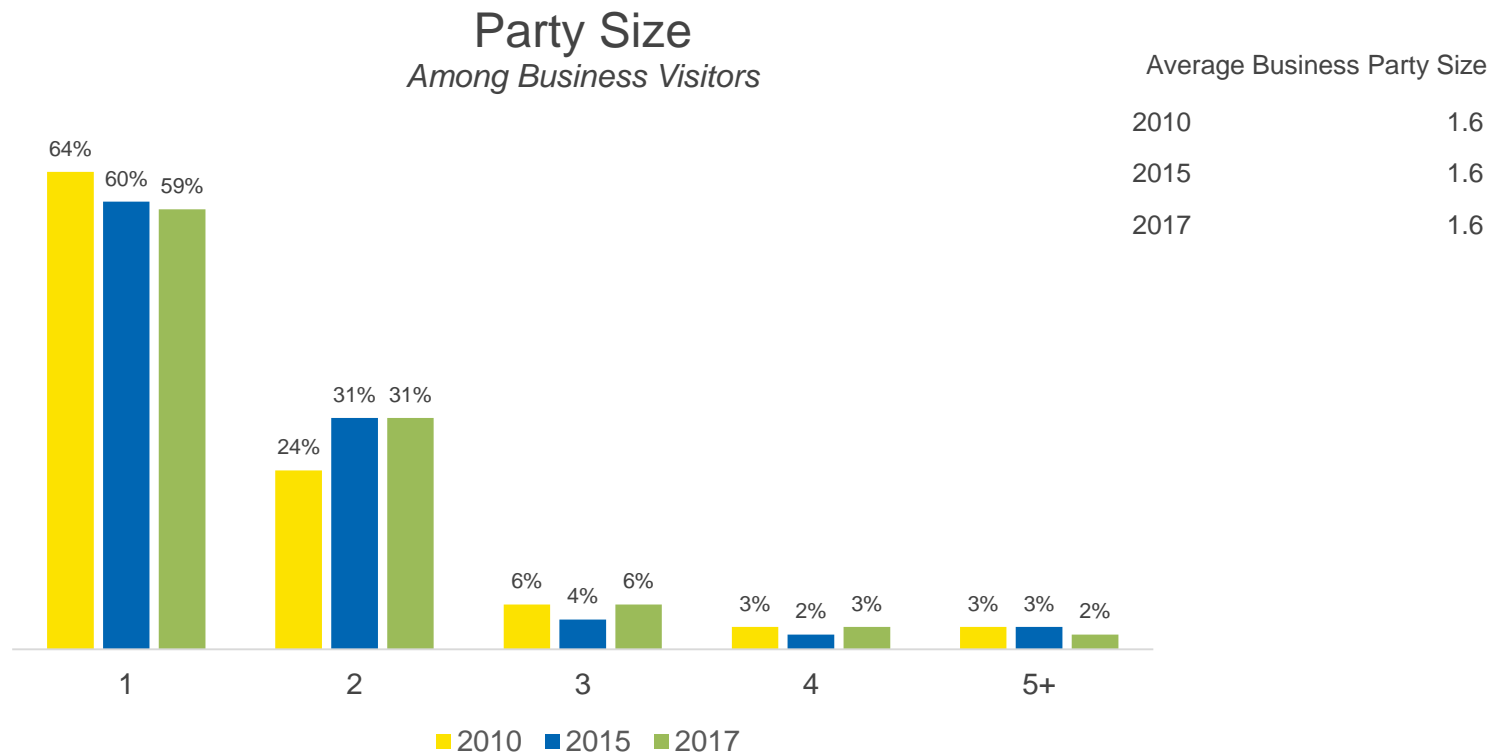
Compared with 2010, there is a trend towards fewer parties of one and an increase in the proportion of VFR visitors travelling in parties of two.



Source: VES 2010 – Table B2; VES 2015 & 2017 - Table C1

# PARTY CHARACTERISTICS

The party size of business visitors remained consistent with 2015 levels, with nearly six in ten travelling alone.

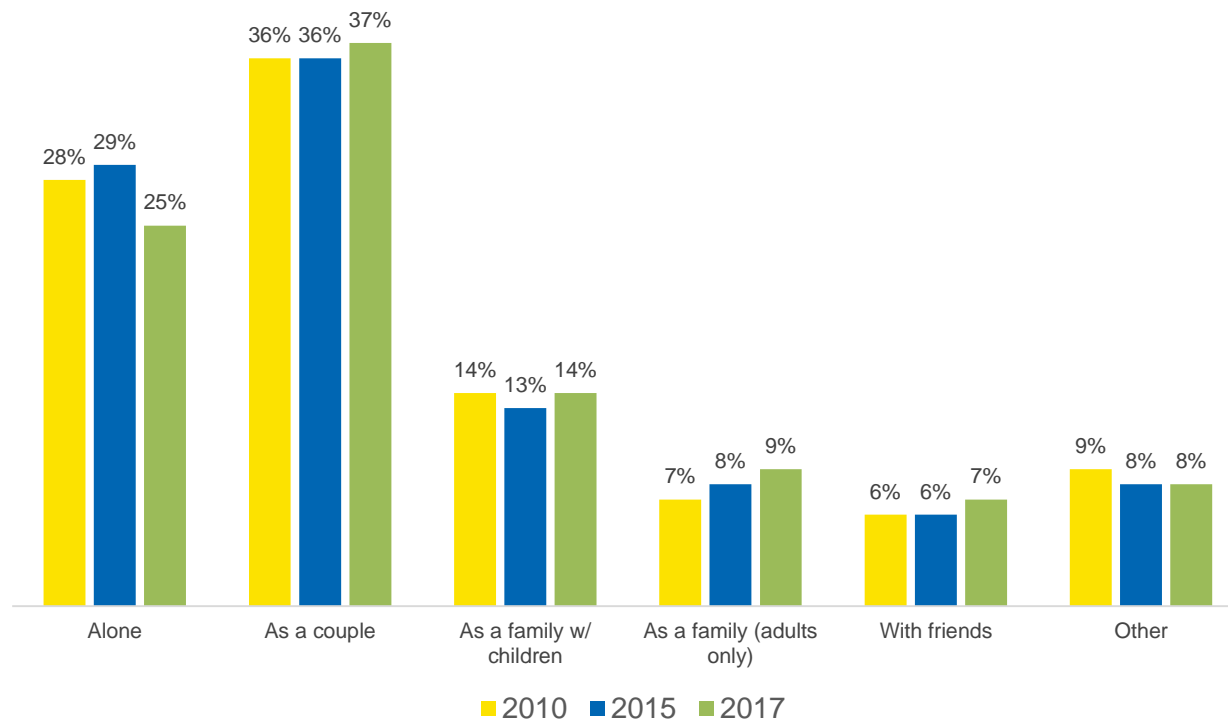


Source: VES 2010 – Table B2; VES 2015 & 2017 - Table C1

# PARTY CHARACTERISTICS

Overall party composition reported by visitors in 2017 is consistent with 2015 results with the exception of a decrease in visitors who travelled alone. Visitors remain most likely to travel as a couple or alone.

## Party Composition



Source: Table D10



# TRIP CHARACTERISTICS

While there are some regional variances, in general visitors in 2017 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	25%	27%	29%	23%	24%	23%	22%	23%	30%
As a couple	37%	34%	35%	38%	44%	50%	42%	44%	34%
NET family*	26%	25%	22%	30%	23%	15%	24%	22%	24%
Other	12%	14%	14%	10%	8%	12%	12%	11%	12%

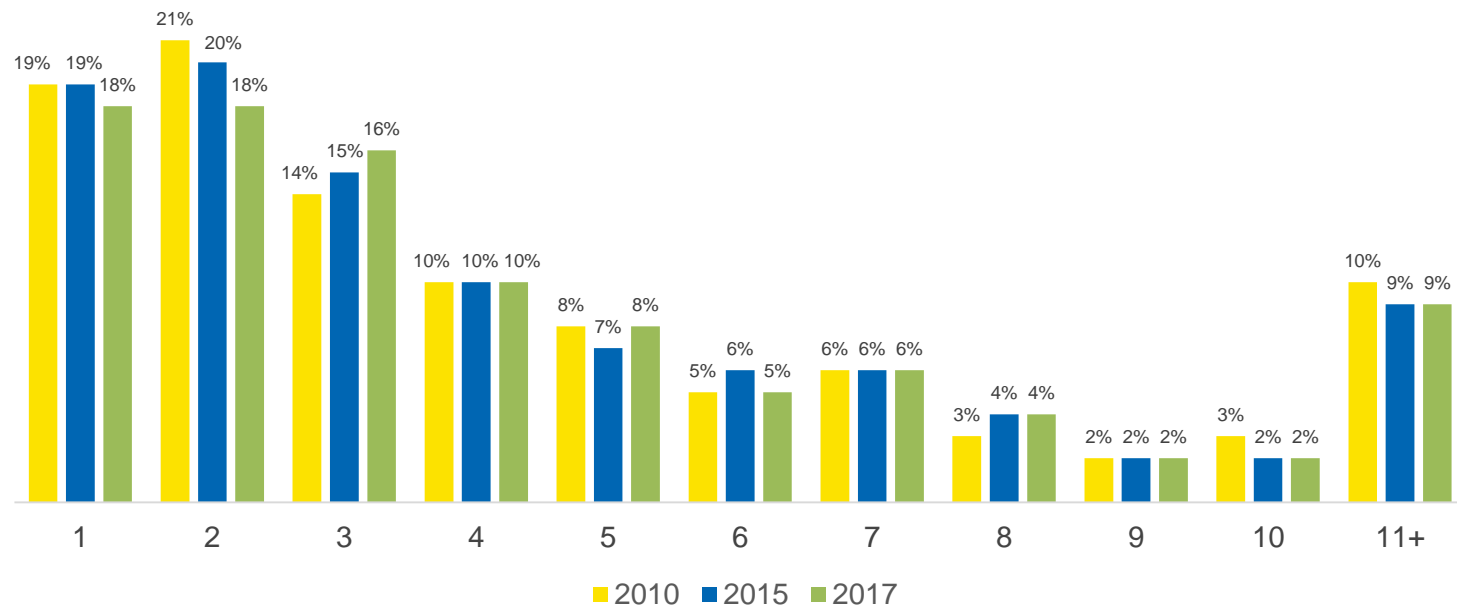
Source: Table D10

\* NET FAMILY includes 'As a family with children', 'As two or more families with children', 'As a family (adults only)', 'As a family with grandparents', and 'Grandparents with grandchildren'.

# PARTY CHARACTERISTICS

In 2017, the majority of visitors stayed in Nova Scotia between one and three nights, consistent with 2010 and 2015.

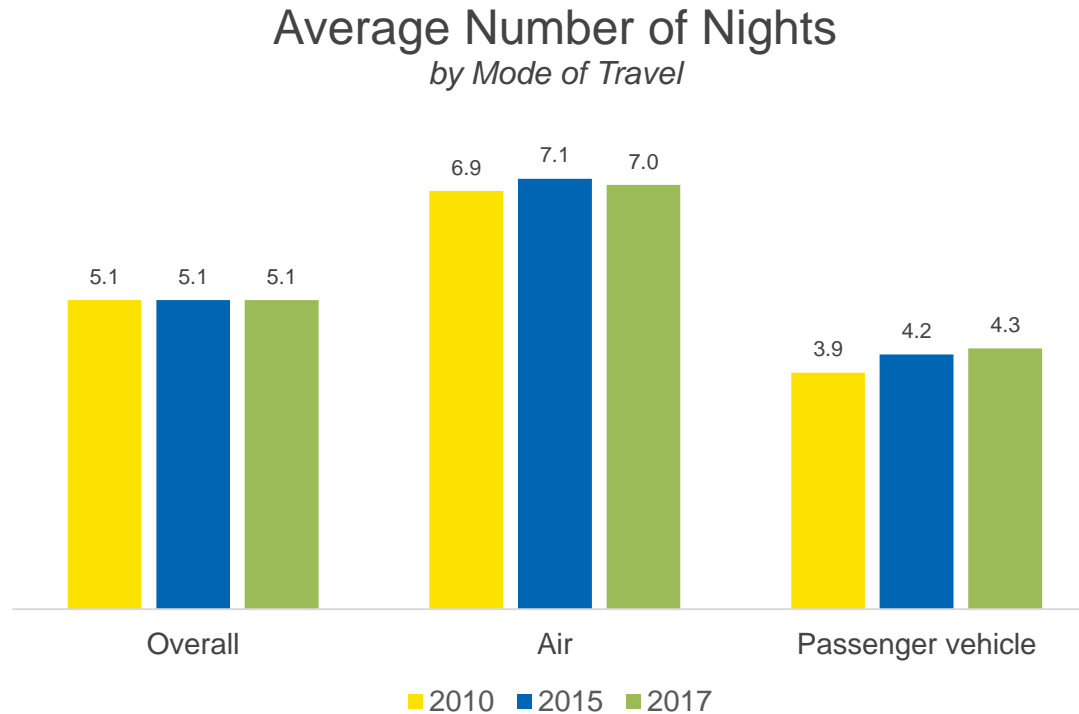
## Number of Nights Stayed in Nova Scotia



Source: Table D1

# PARTY CHARACTERISTICS

Air visitors continue to stay longer compared with those travelling by passenger vehicle, although visitors travelling by passenger vehicle are reporting longer stays compared with 2010.

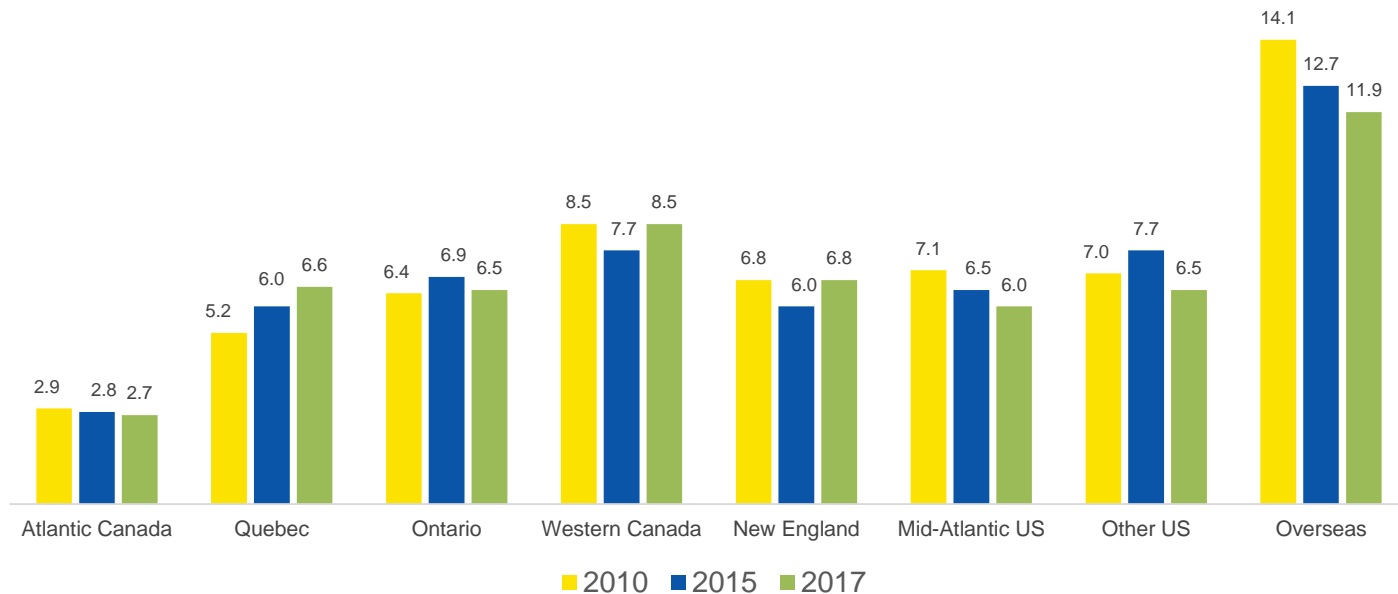


Source: Table D1

# PARTY CHARACTERISTICS

Visitors from Quebec, Western Canada and New England stayed longer in Nova Scotia in 2017 compared with 2015, with a decline in length of stay observed among those from Ontario, Mid-Atlantic US, Other US and Overseas.

Average Number of Nights  
*by Market Region*

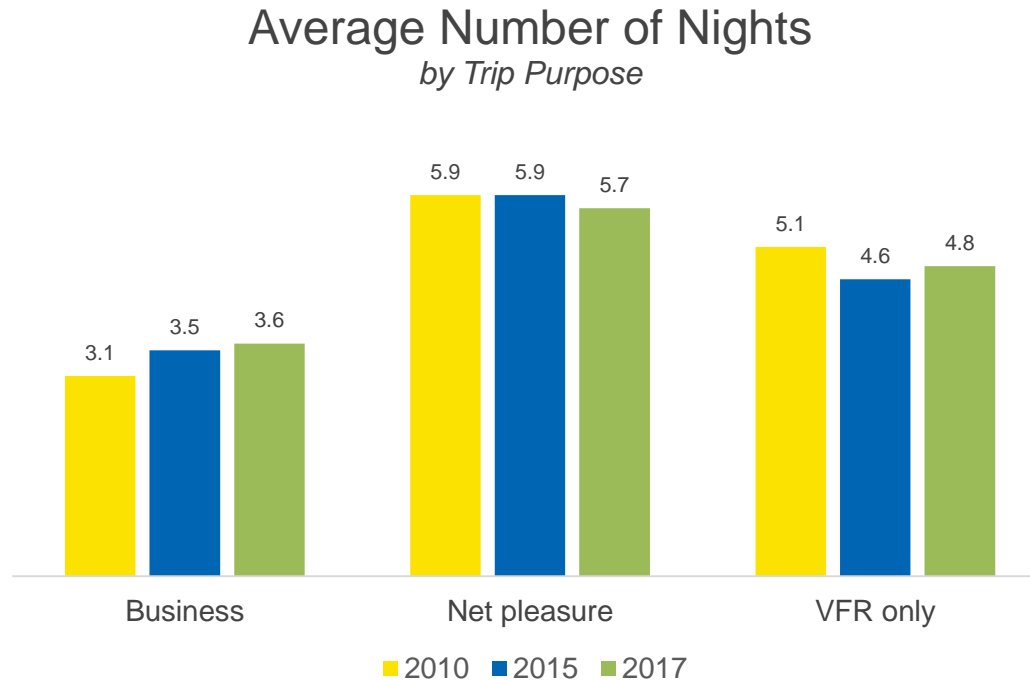


Source: Table D1



# PARTY CHARACTERISTICS

The average number of nights spent in Nova Scotia is consistent with 2015 across trip purpose.

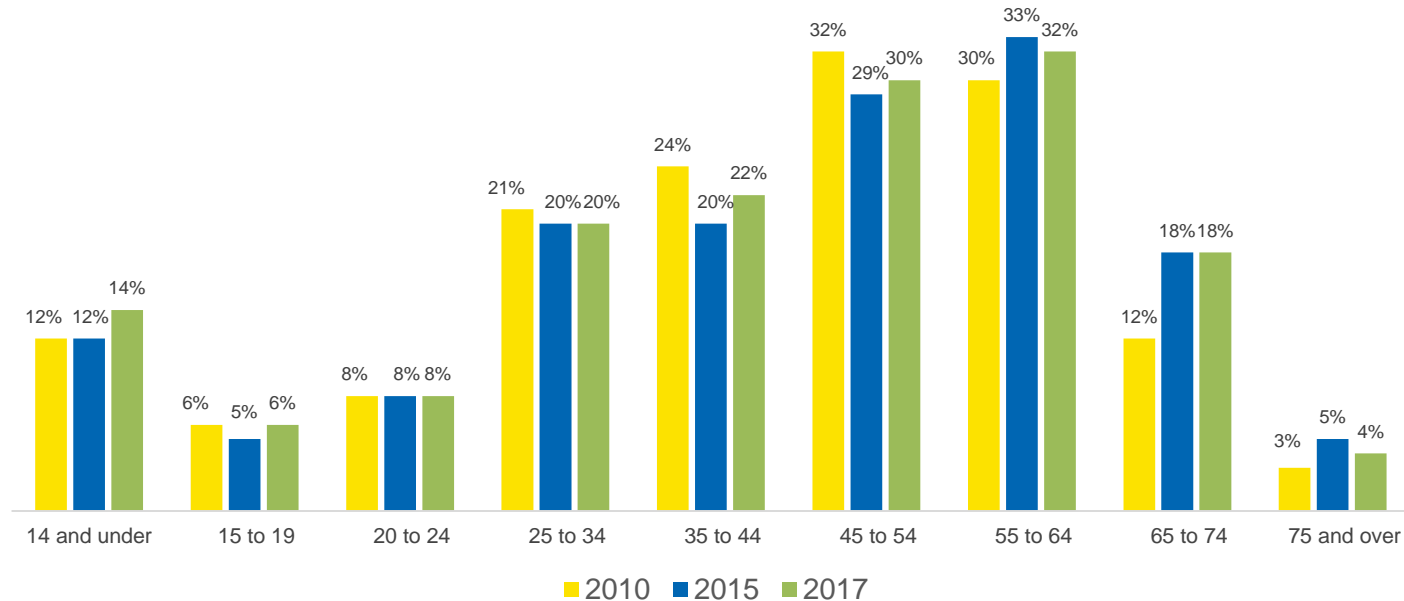


Source: Table D1

# PARTY CHARACTERISTICS

The largest age groups represented among visitors to Nova Scotia in 2017 are visitors aged 55 to 64 and those aged 45 to 54.

## Age Groups Represented Within Party

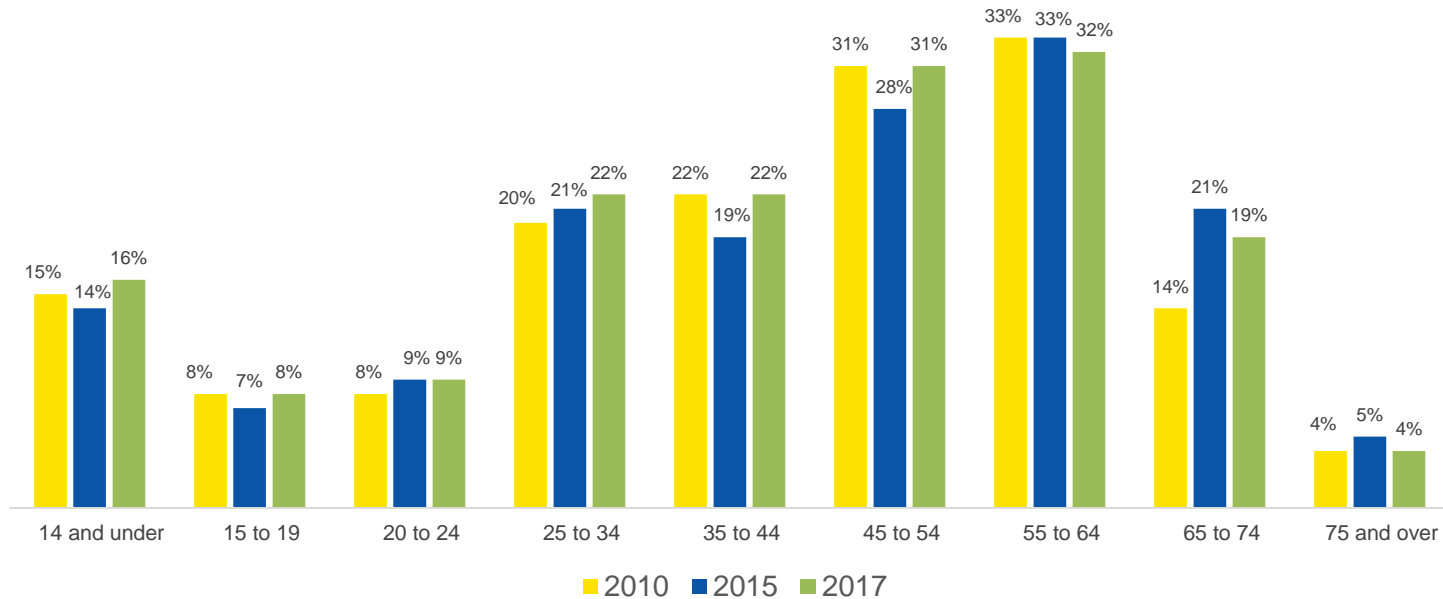


Source: Table D11

# PARTY CHARACTERISTICS

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

Age Groups Represented Within Party  
*Among Net Pleasure Visitors*

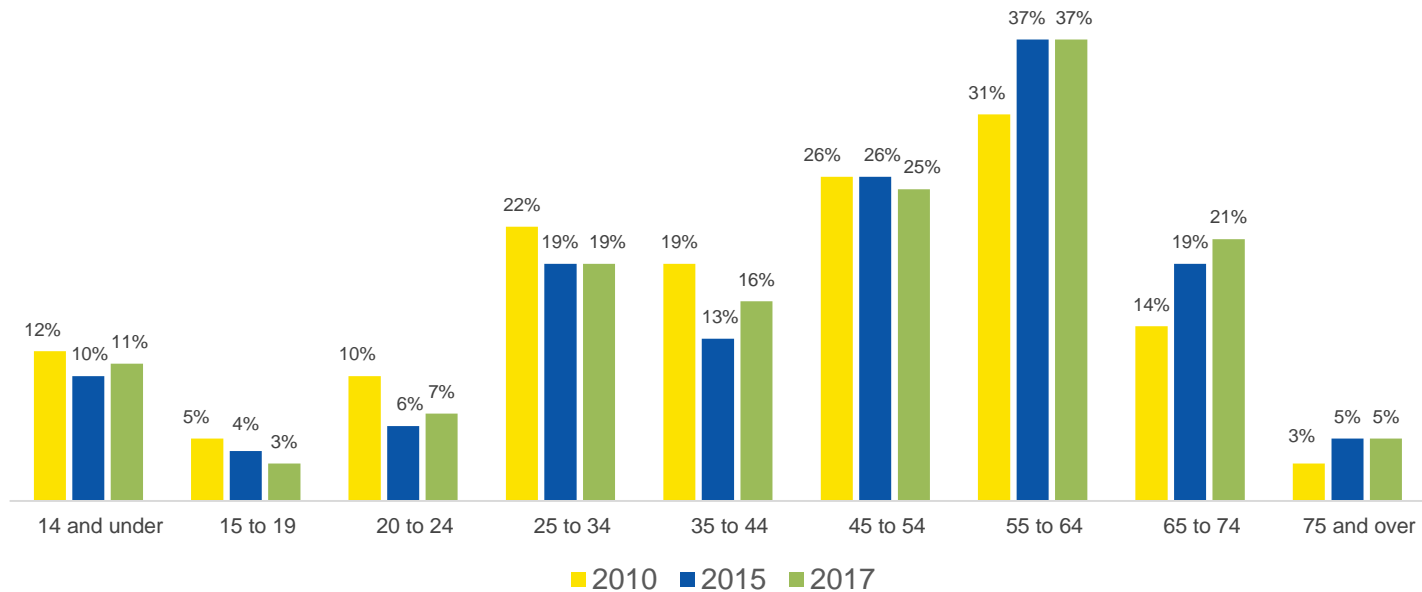


Source: Table D11

# PARTY CHARACTERISTICS

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

Age Groups Represented Within Party  
*Among VFR Only Visitors*

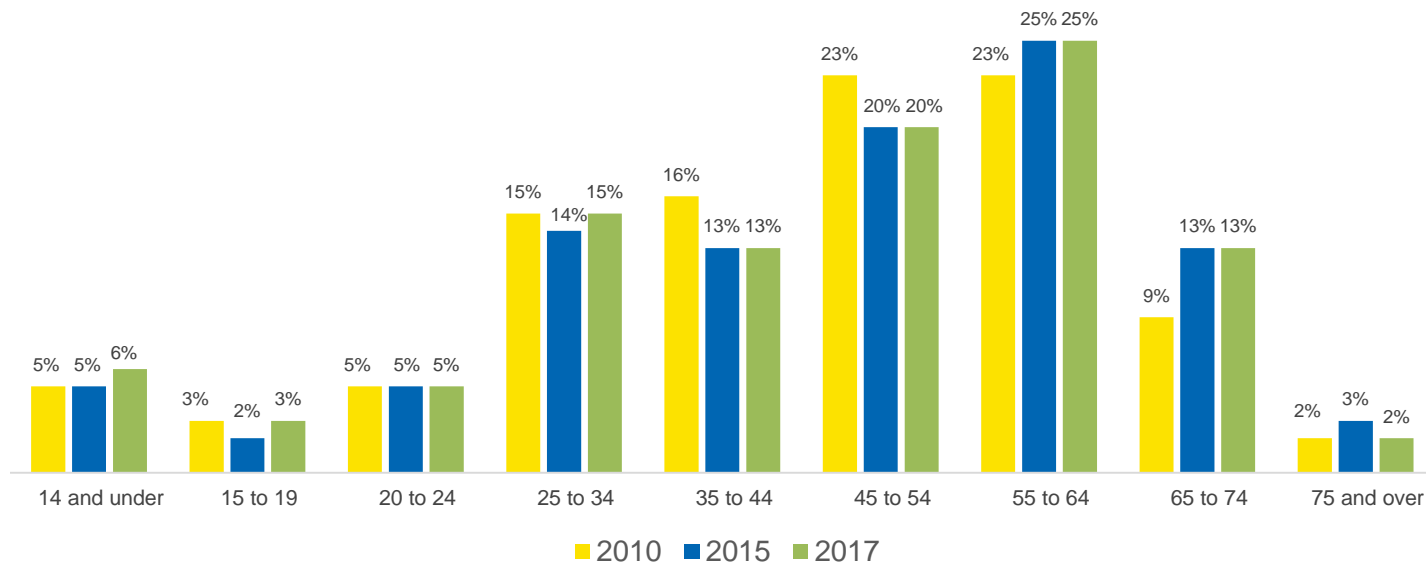


Source: Table D11

# 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. In 2017, four in ten visitors to Nova Scotia were aged 55 or older, while one-third were aged 35 to 54. Nearly one-third were under 35 years of age. Compared with 2015, the visitor population has a slightly younger age profile in 2017.

## Visitors by Age Group



Source: Table D11

# VISITOR EXPENDITURES

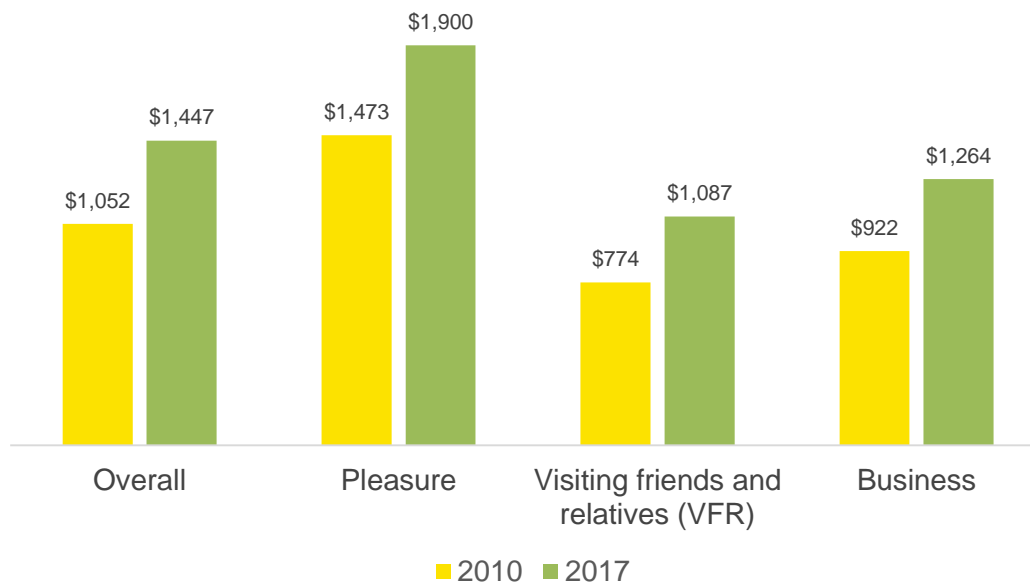
Average Expenditures by Visitors to Nova Scotia



# Visitor Expenditures – By Trip Purpose

Pleasure visitor parties spend the most during their Nova Scotia visit, followed by those visiting for business. Per party spend has increased across all trip types compared with 2010.

Visitor Expenditures Per Party, Per Trip  
*Including allocated Travel\*, Excluding Major Purchases*



Source: Table D22/24

Note: 2010 results are expressed in 2010 dollars

Note: No available data for 2015

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia

# Visitor Expenditures – By Trip Purpose

Examining spend at the per visitor level, business visitors spend the most, closely followed by pleasure visitors.

Total Expenditures, Including Allocated Travel*, Excluding Major Purchases				
	Overall	Business	Pleasure	VFR
Per Person, Per Day	\$128	\$220	\$143	\$95
Per Person, Per Trip	\$639	\$775	\$735	\$518
Per Party, Per Trip	\$1,447	\$1,264	\$1,900	\$1,087
Party Size	2.3	1.6	2.6	2.1
Length of Stay	5.1	3.6	5.3	5.7

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia.

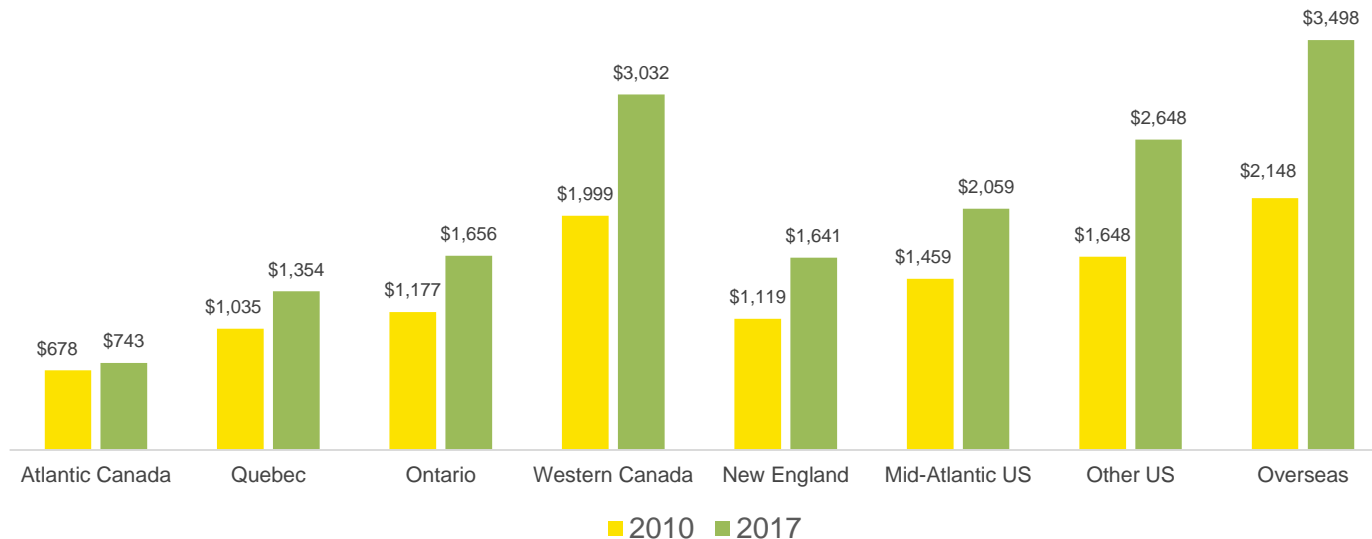
Source: Table D22/24, C1 & D1



# Visitor Expenditures – By Market

Overseas visitors saw the largest increase in spend in 2017 compared with 2010, followed by those from Western Canada and Other US regions. Visitor expenditures increased across all markets compared with 2010.

## Visitor Expenditures Per Party, Per Trip *Including allocated Travel, Excluding Major Purchases*



Source: Table D22/24

Note: 2010 results are expressed in 2010 dollars

Note: No available data for 2015

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia

# Visitor Expenditures – By Market

In terms of per party, per trip spend, those from market regions that are farther away from Nova Scotia tend to spend more than those from market regions that are closer; however, when it comes to per person, per day spend, those from Atlantic Canada spend more than those from Quebec, Ontario and New England.

Total Expenditures, Including Allocated Travel*, Excluding Major Purchases								
	Atlantic Canada	Quebec	Ontario	Western Canada	New England	Middle Atlantic	Other US	Overseas
Per Person, Per Day	\$130	\$96	\$110	\$163	\$118	\$156	\$148	\$152
Per Person, Per Trip	\$341	\$609	\$690	\$1,335	\$765	\$939	\$1,010	\$1,691
Per Party, Per Trip	\$743	\$1,354	\$1,656	\$3,032	\$1,641	\$2,059	\$2,648	\$3,498
Party Size	2.2	2.2	2.4	2.3	2.1	2.2	2.6	2.1
Length of Stay	2.7	6.6	6.5	8.5	6.8	6.0	6.5	11.9

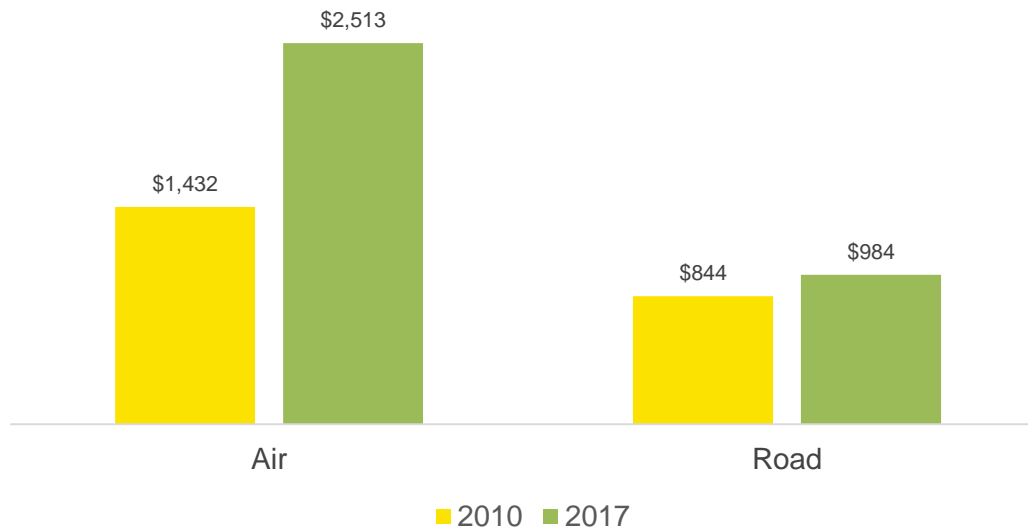
\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia.

Source: Table D22/24, C1 & D1

# Visitor Expenditures – Air vs. Road

Air visitor parties spend two and a half times more than road visitor parties during their Nova Scotia trip. While there was a modest increase in spending reported by road visitors, those travelling by air reported a significant increase, more than \$1,000, compared with 2010.

Visitor Expenditures Per Party, Per Trip  
*Including allocated Travel, Excluding Major Purchases*



Source: Table D22/24

Note: 2010 results are expressed in 2010 dollars

Note: No available data for 2015

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia

# Visitor Expenditures - Air vs. Road

Air visitors spend more when it comes to per person per trip spend. Air travellers spend, on average, nearly \$70 more per person, per day when visiting Nova Scotia compared with road visitors.

Total Expenditures, Including Allocated Travel*, Excluding Major Purchases		
	Air	Road
Per Person, Per Day	\$169	\$101
Per Person, Per Trip	\$1,175	\$423
Per Party, Per Trip	\$2,513	\$984
Party Size	2.2	2.4
Length of Stay	7.0	4.3

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia.

Source: Table D22/24, C1 & D1

# Visitor Expenditures – First-time Visitors

First-time visitors spend over twice as much over the course of their trip as those who have previously visited the province. While return visitors reported a modest increase in spending in 2017, spending among first-time visitors, who were primarily visiting the province for pleasure, increased significantly compared with 2010.

## Visitor Expenditures Per Party, Per Trip *Including allocated Travel, Excluding Major Purchases*



Source: Table D22/24

Note: 2010 results are expressed in 2010 dollars

Note: No available data for 2015

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia

# Visitor Expenditures – First-time Visitors

First-time visitors spend over twice as much over the course of their trip as those who have previously visited the province. First-time visitors overall spend nearly \$400 more per person per trip and more than \$50 per person, per day when compared with return visitors.

Total Expenditures, Including Allocated Travel*, Excluding Major Purchases		
	Air	Road
Per Person, Per Day	\$169	\$101
Per Person, Per Trip	\$1,175	\$423
Per Party, Per Trip	\$2,513	\$984
Party Size	2.2	2.4
Length of Stay	7.0	4.3

\*Allocated travel is defined as 50% of the money spent getting to and from Nova Scotia.

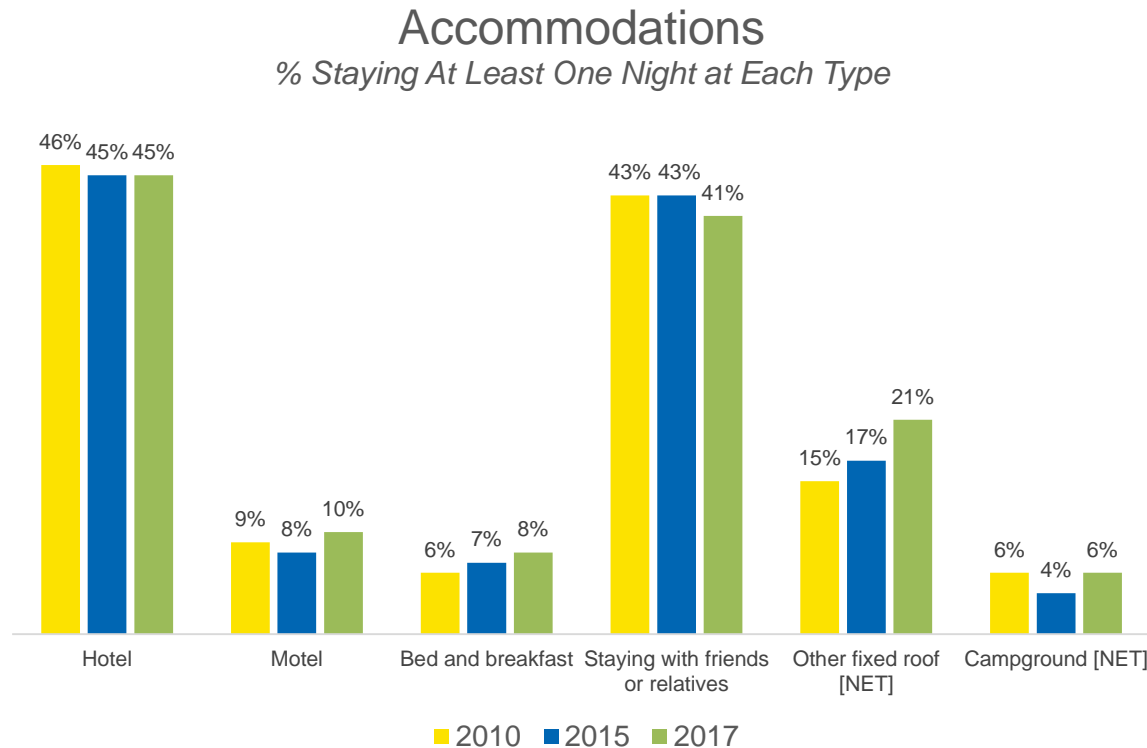
Source: Table D22/24, C1 & D1

# Accommodations

Types of Accommodations Used by Visitors to Nova Scotia

# ACCOMMODATIONS

Accommodation types used by visitors in 2017 are similar to those in 2015, with the exception of an increase in the percentage of visitor parties reporting they stayed in other fixed roof accommodations (see next page for details). Visitors remain 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.

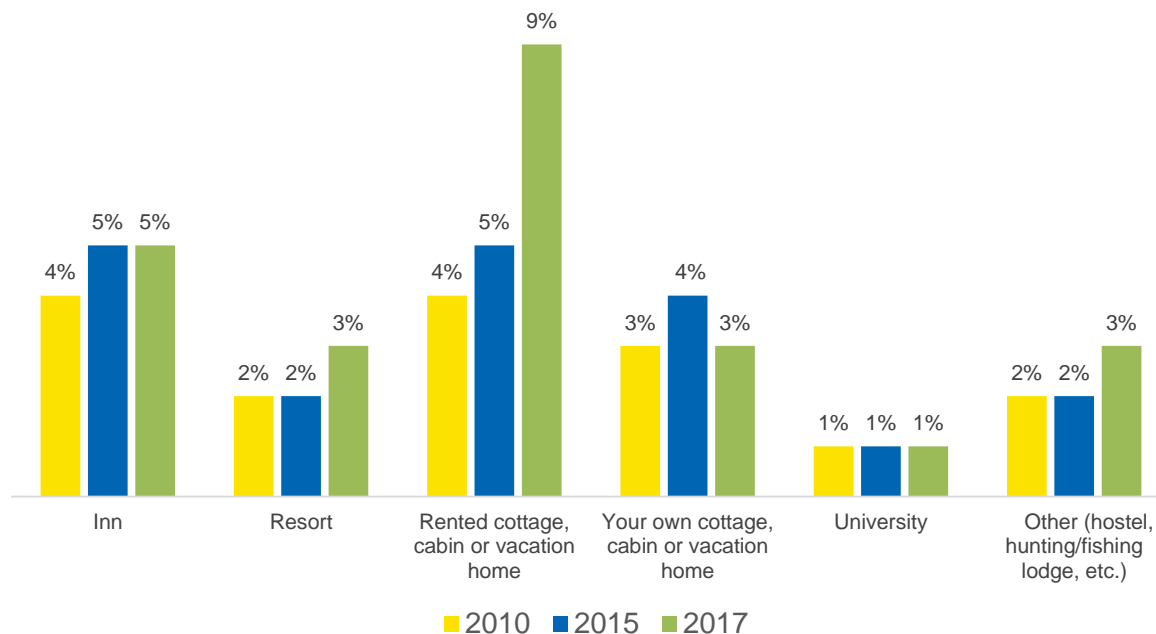
Source: Table D25



# ACCOMMODATIONS

The increase in the percentage of visitors staying in Other fixed roof [NET] in 2017 was driven by those staying in a rented cottage, cabin, or vacation home.

Other Fixed Roof [NET] Accommodations  
*% Staying At Least One Night at Each Type*

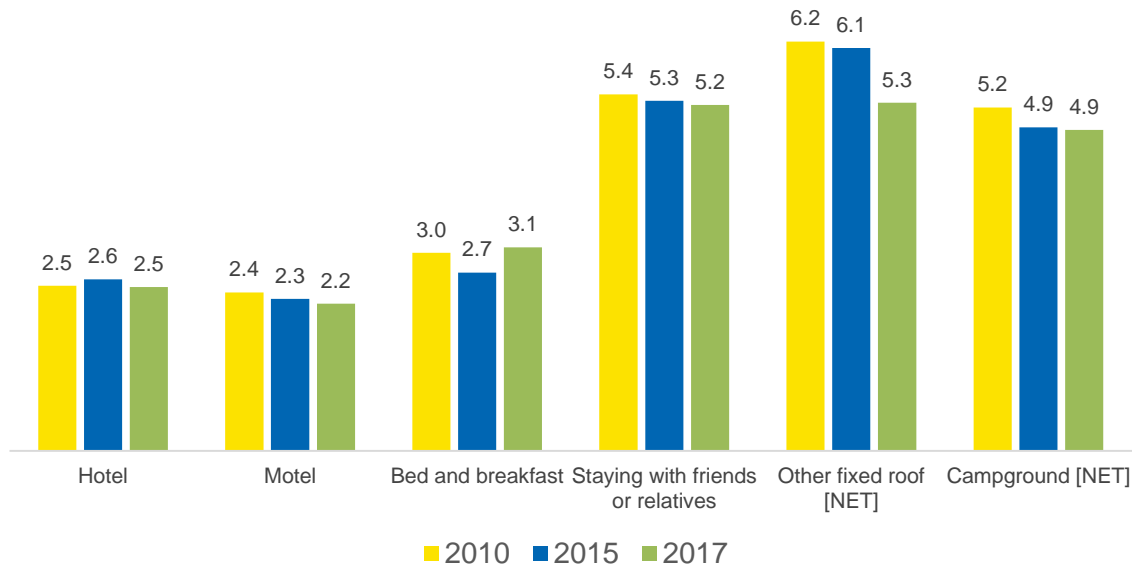


Source: Table D25

# ACCOMMODATIONS

The average number of nights spent in each accommodation type in 2017 is consistent with 2015, with the exception of a slight decrease in the number of nights stayed in other fixed roof accommodations. There has been a trend toward shorter stays in other fixed roof accommodations since 2010.

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



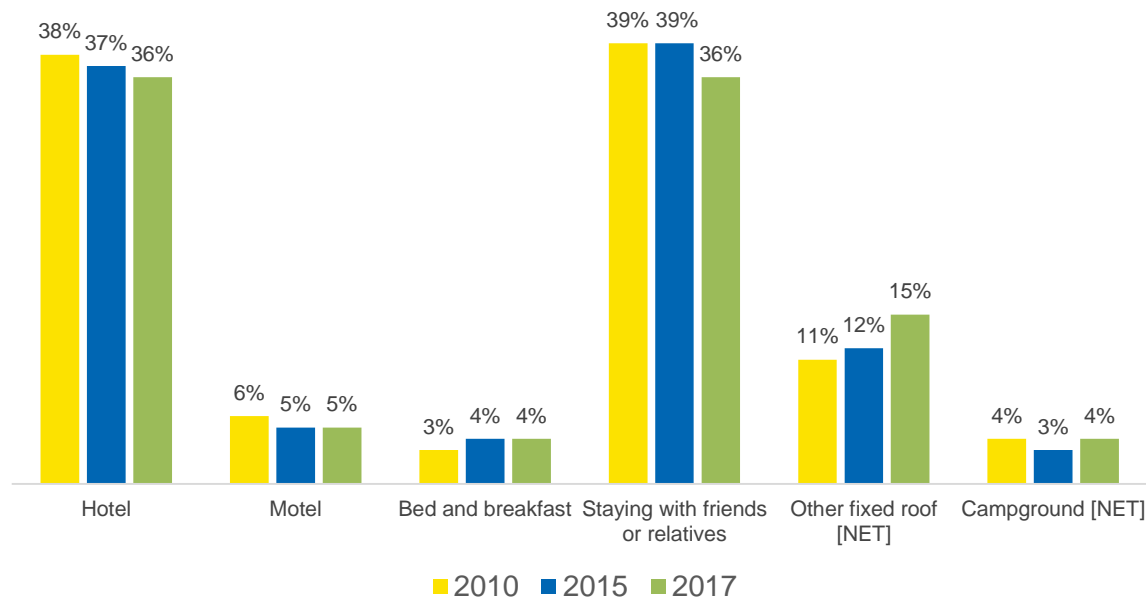
Note that the average number of nights by accommodation type does not directly relate to the total length of a trip, as a visitor might stay in more than one type of accommodation during their Nova Scotia visit.

Source: Table D25

# 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. The increase in the popularity of other fixed roof [NET] accommodations can be seen here with these types of accommodations accounting for 15% of all nights, compared with 11% in 2010. This increase corresponds with slight declines in share of nights among hotels and staying with friends or relatives.

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.

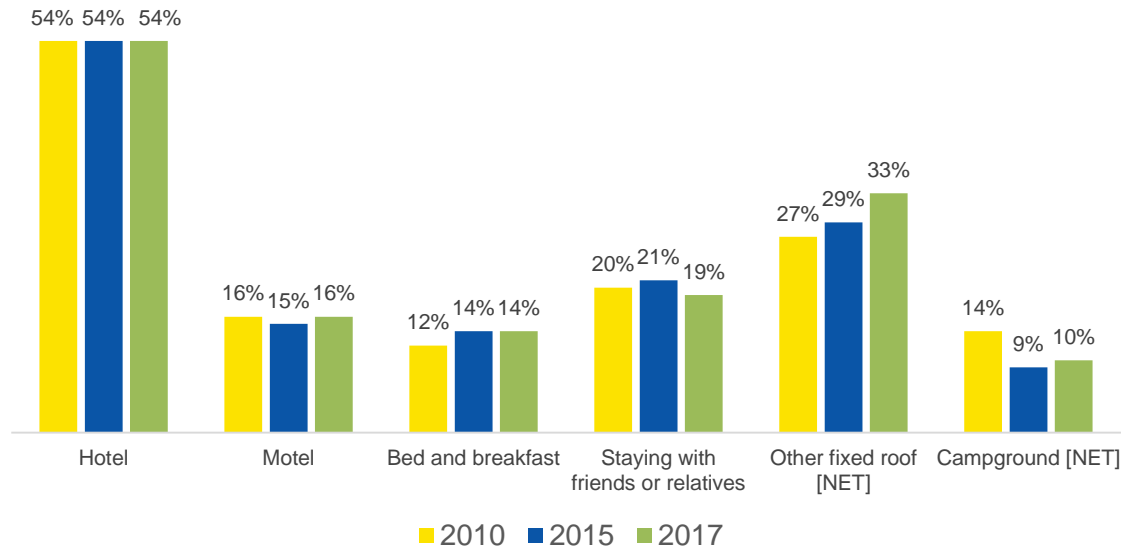
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

# ACCOMMODATIONS

Accommodation types used by pleasure visitors in 2017 are virtually unchanged from 2015 with the exception of an increase in those staying in other fixed roof accommodations. Visitors are 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.

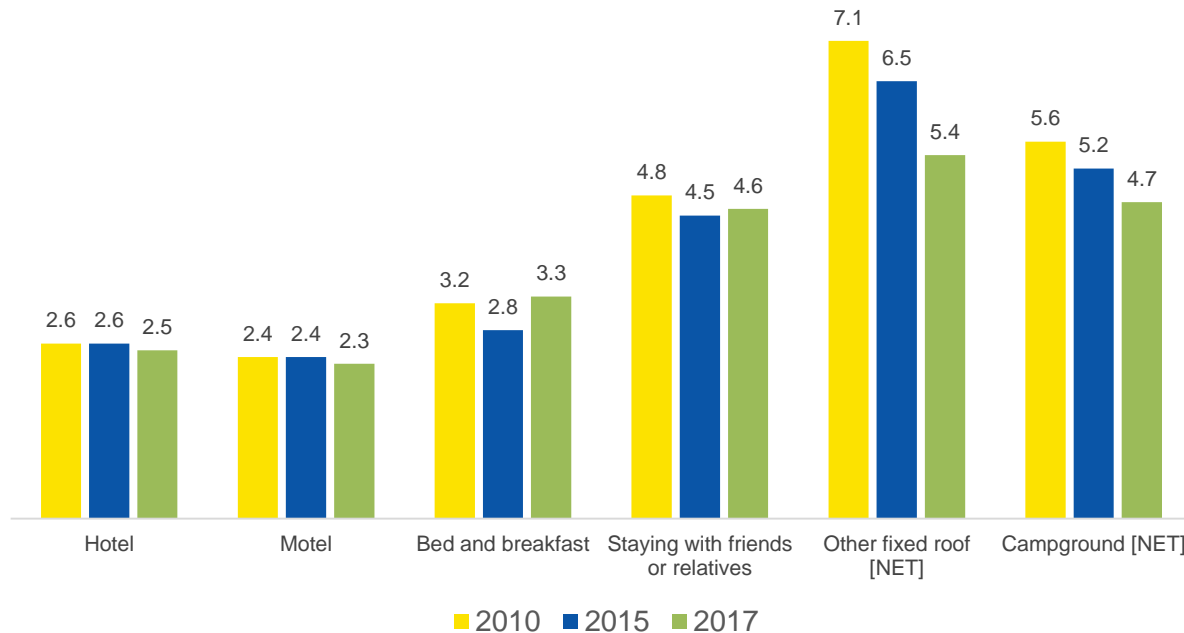
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

# ACCOMMODATIONS

Among pleasure visitors in 2017, the average number of nights spent at other fixed roof accommodations has been decreasing since 2010, there has been similar decreases in the number of nights spent at campgrounds.

## Average Nights Spent in Accommodation *Among Pleasure Parties*



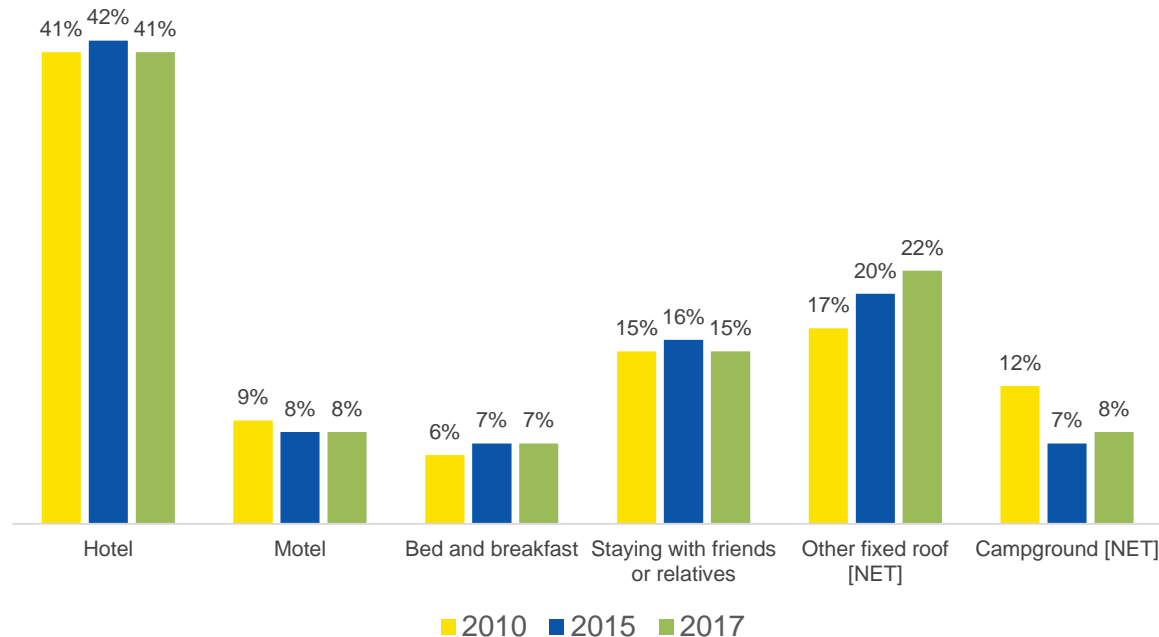
Note that the average number of nights by accommodation type does not directly relate to the total length of a trip, as a visitor might stay in more than one type of accommodation during their Nova Scotia visit.

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 2015. Compared with 2010, other fixed roof accommodations share of nights has increased, with a corresponding decline among campgrounds.

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.

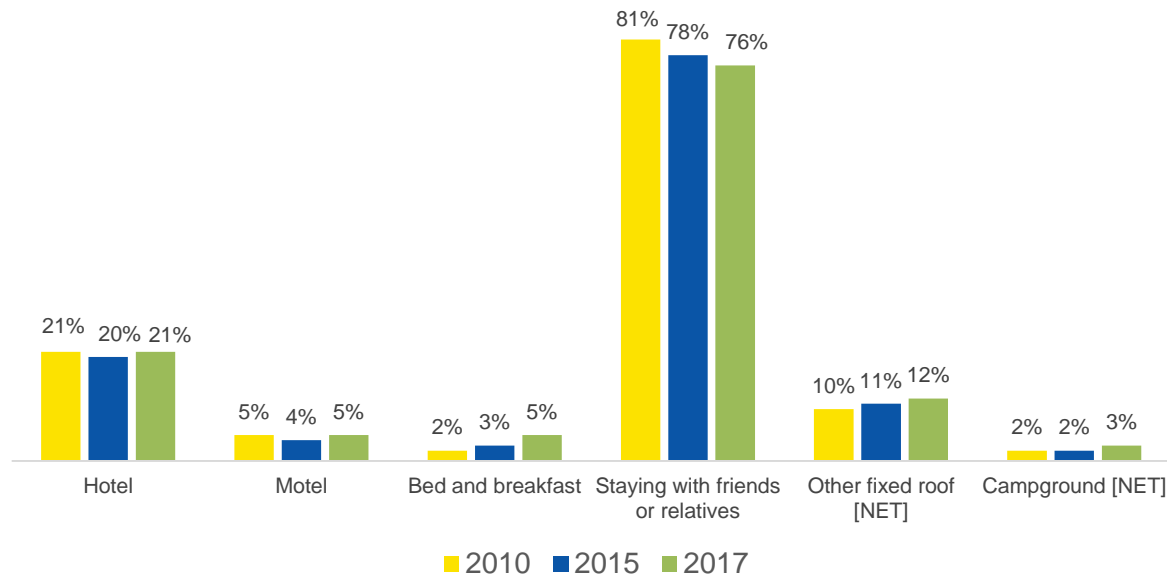
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

# ACCOMMODATIONS

As might be expected, the vast majority of VFR visitors report they stayed with friends or relatives while in Nova Scotia, consistent with 2015 results. Compared with 2010, the incidence of staying with friends or relatives is trending downwards.

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.

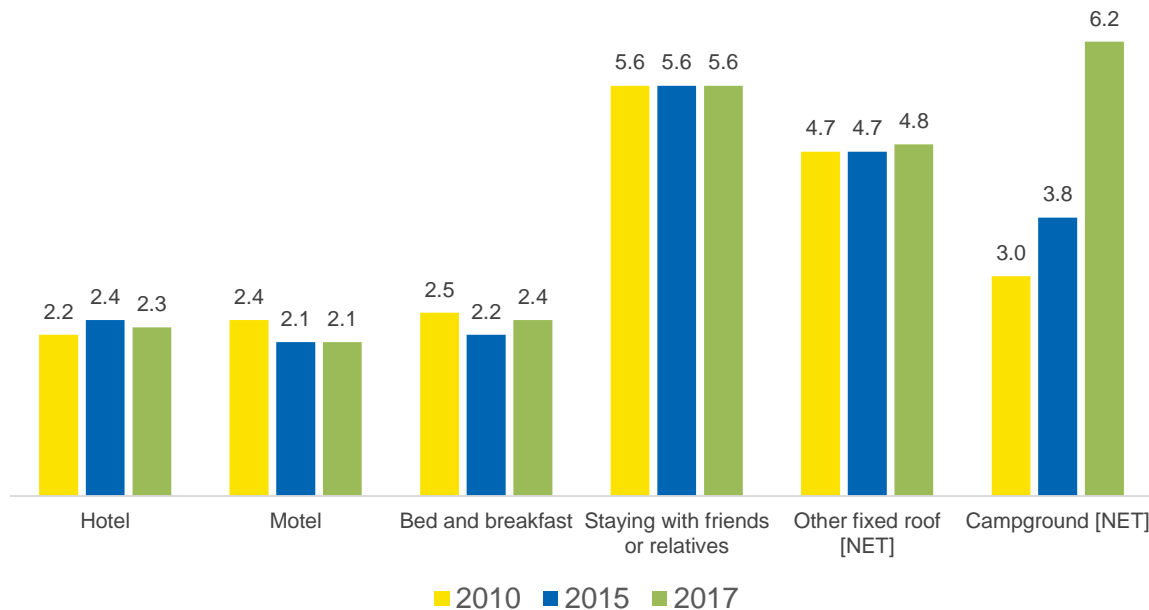
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

# ACCOMMODATIONS

In 2017, VFR visitors reported stays that are consistent with 2015 results, with the exception of a large increase in the number of nights stayed in campgrounds.

Average Nights Spent in Accommodation  
*Among VFR 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.

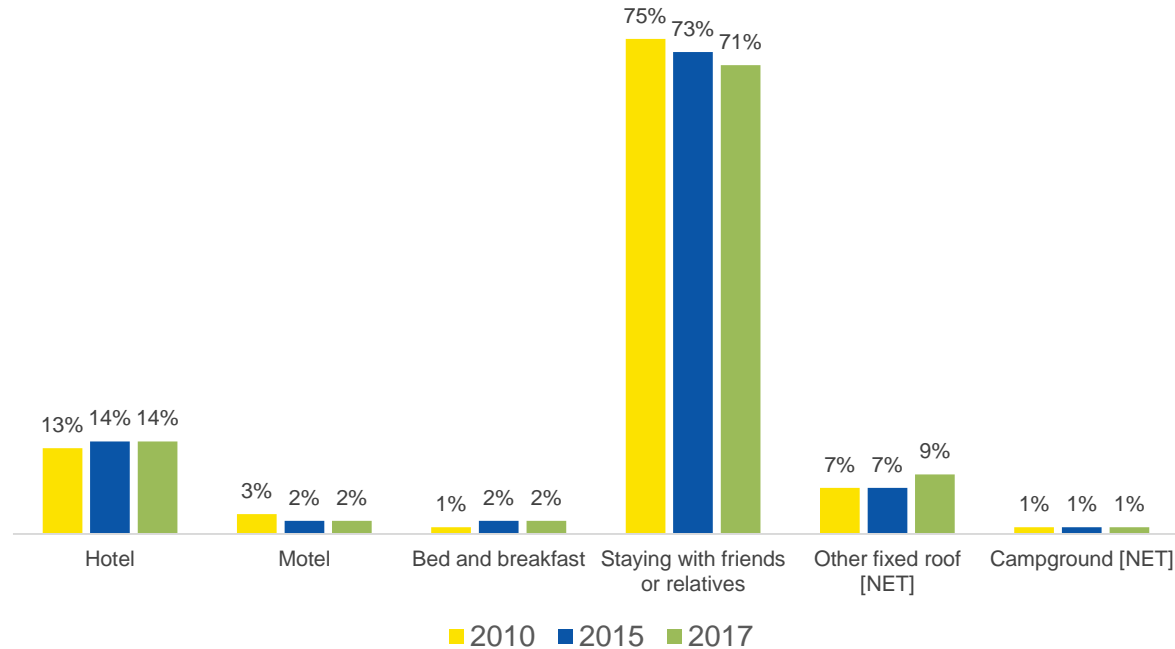
Source: Table D25



# ACCOMMODATIONS

Looking at each accommodation type's share of overall nights in Nova Scotia among VFR visitors, friends and relatives received the largest percentage of overall nights in Nova Scotia. There has been a slight decline between 2010 and 2017 in the share of nights stayed with friends or relatives, reflective of the overall downward trend in staying with friends or relatives.

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.

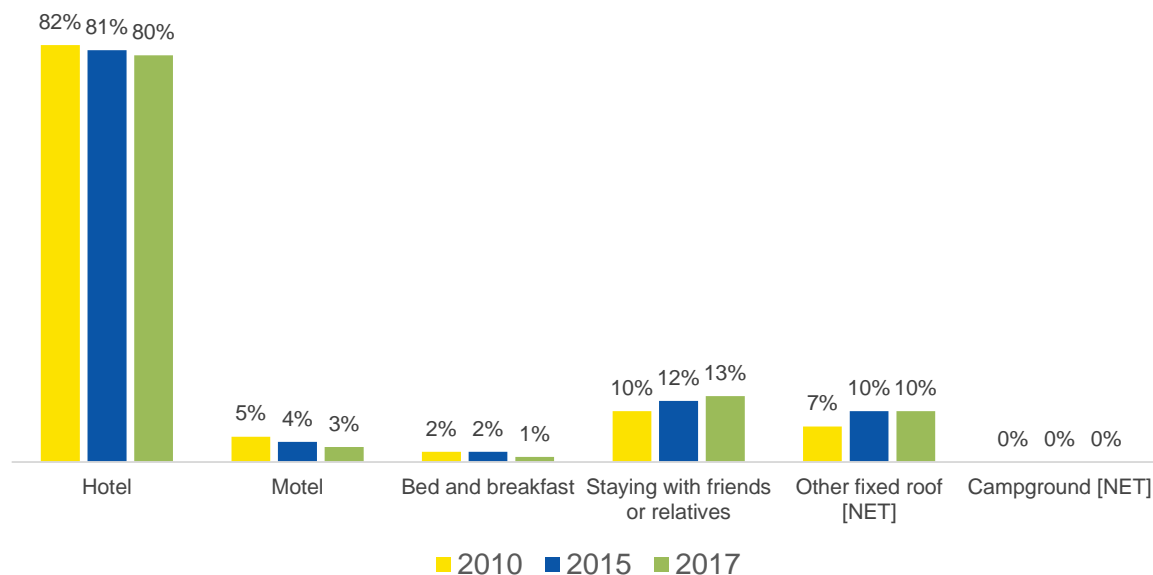
'NET campground' includes national, provincial, and commercial campgrounds.

Source: Table D25

# ACCOMMODATIONS

The vast majority of business visitors report staying in a hotel, and results were consistent with 2015.

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

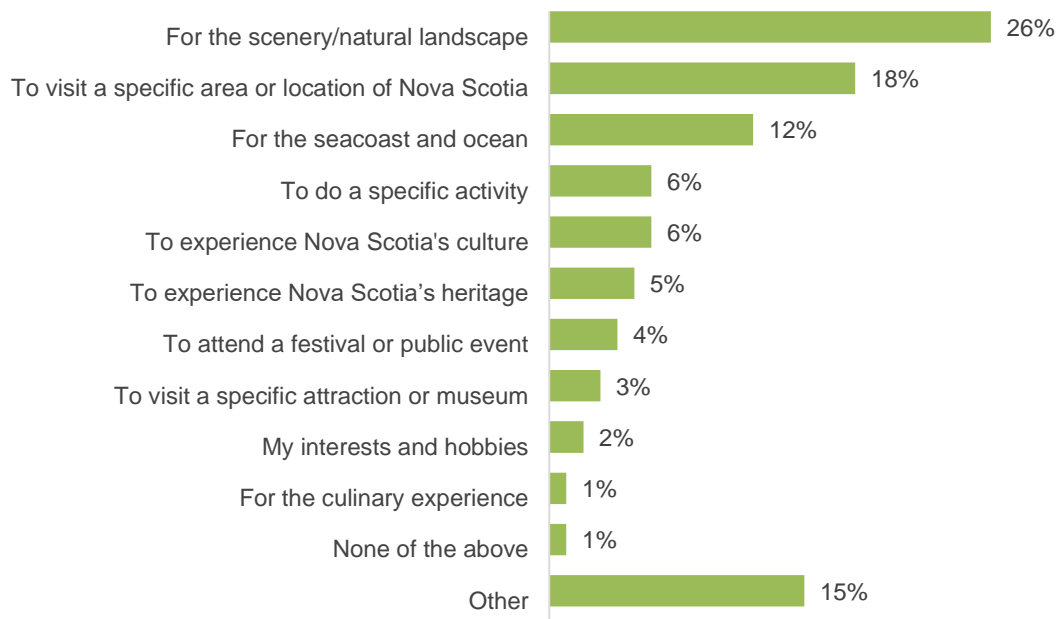
# VISITOR ACTIVITIES

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 choose Nova Scotia for its scenery and natural landscape, to visit a specific location and for the seacoast and the ocean. Nova Scotia's iconic seacoast and natural beauty continue to be significant contributors to pleasure visitors decision to visit the province

## Main Reason for Visiting Nova Scotia\* *Among Pleasure Visitors*



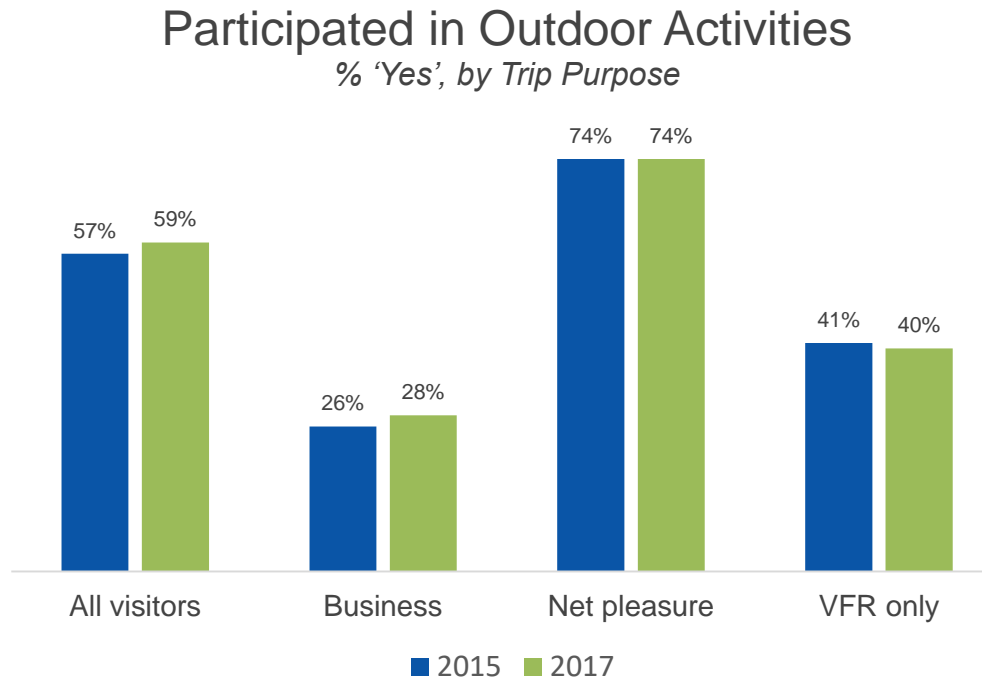
Source: Table D8

Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

# OUTDOOR ACTIVITIES

The rate of participation in outdoor activities is unchanged in 2017 when compared with 2015. Pleasure visitors are most likely to have engaged 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 remain least likely to participate in outdoor activities.



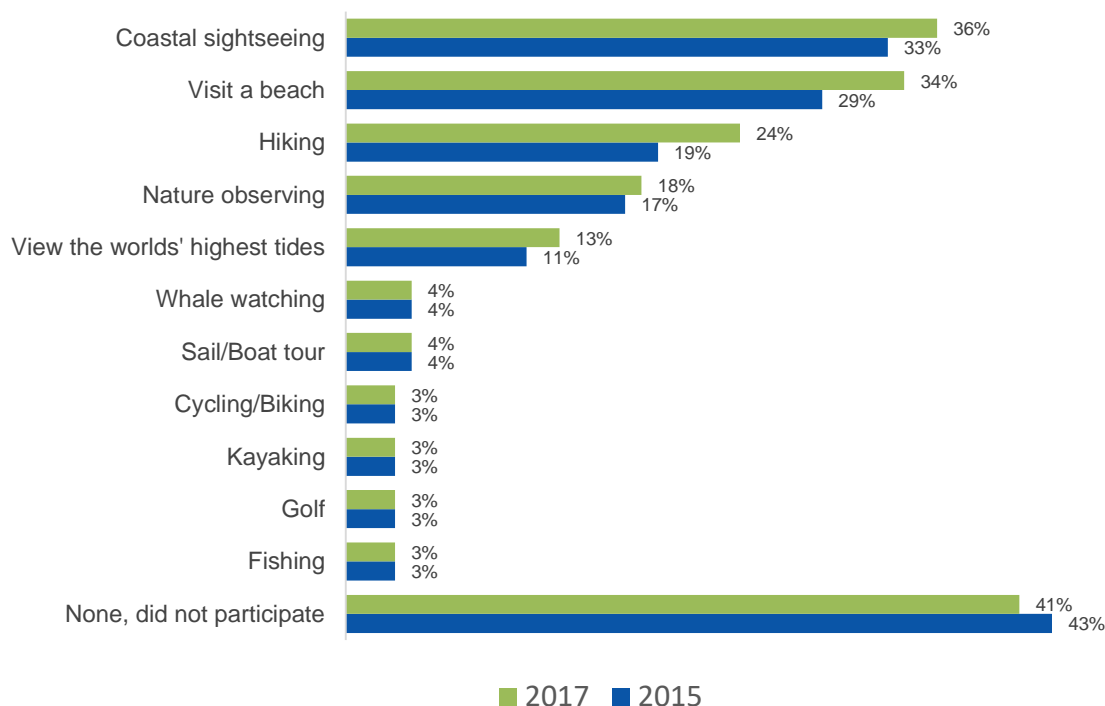
Source: Table N2

Note: No comparable 2010 data

# OUTDOOR ACTIVITIES

Visitors to Nova Scotia in 2017 are more likely to report participating in a range of outdoor activities, compared with 2015. Coastal sightseeing and visiting a beach remain the most popular outdoor activities. A significant number of visitor parties went hiking or participated in nature observation activities, while more than one in ten reported viewing the world's highest tides.

## Participation in Outdoor Activities *Among All Visitors*

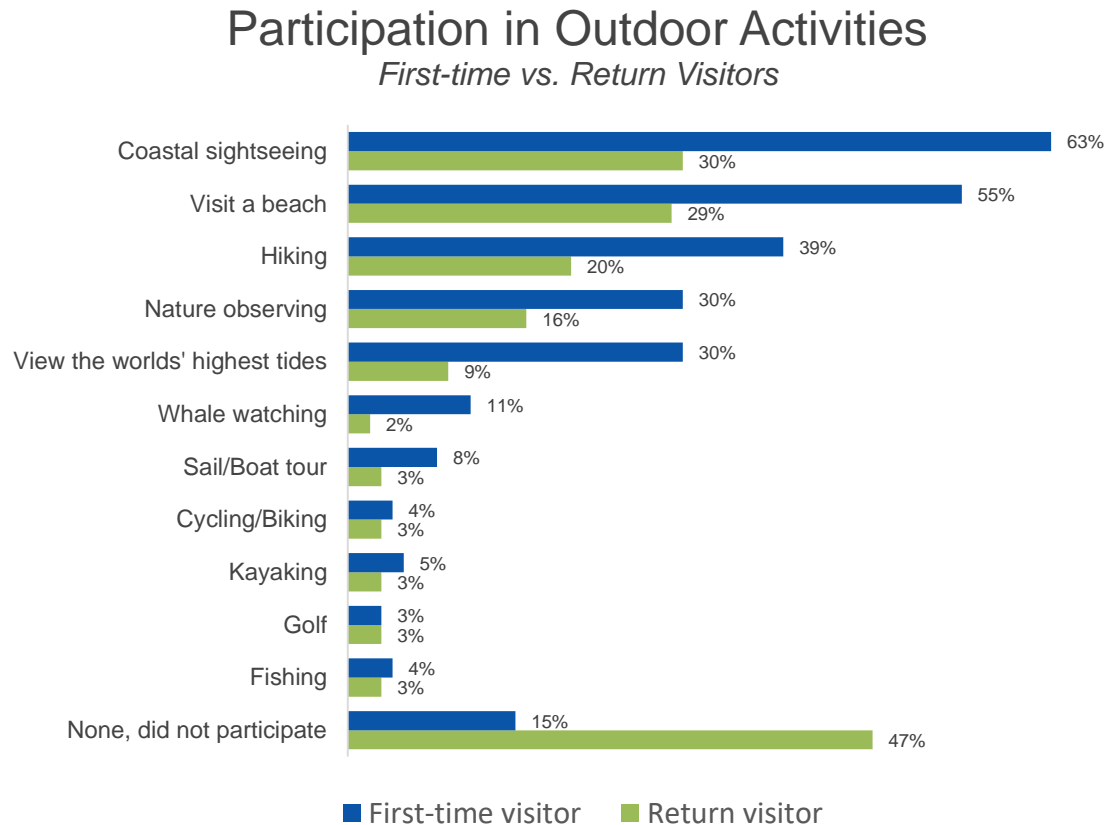


Source: Table N2

Note: No comparable 2010 data

# OUTDOOR ACTIVITIES

First-time visitors are much more likely to participate in outdoor activities compared with return visitors.



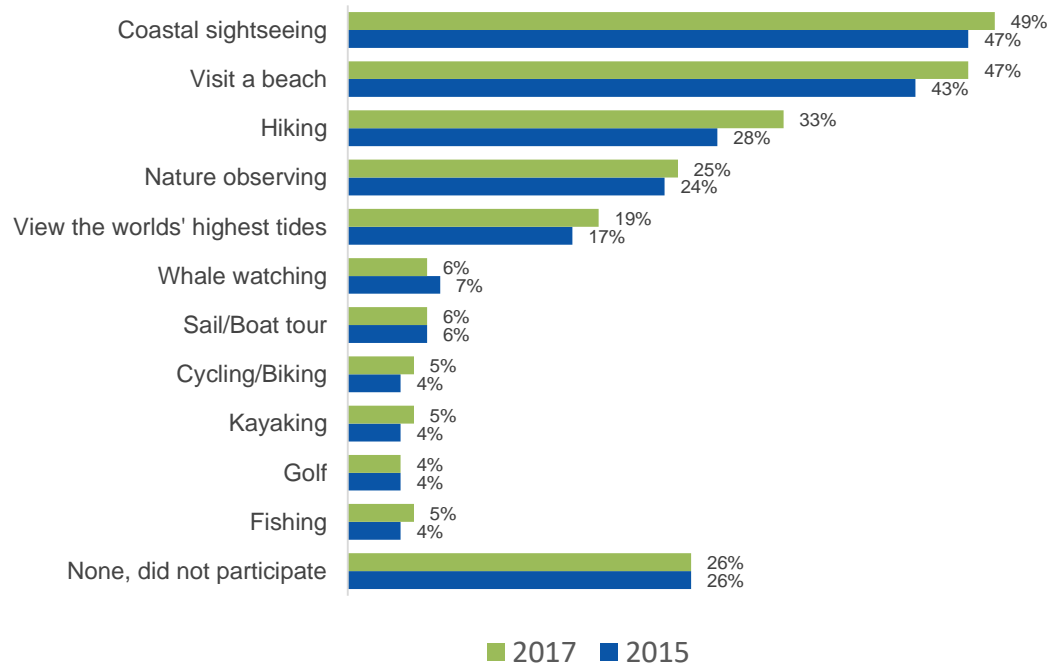
Source: Table N2



# OUTDOOR ACTIVITIES

One-half of pleasure travel parties participated in coastal sightseeing, while nearly one-half visited a beach, one-third went hiking, one-quarter went nature observing, and nearly one in five viewed the world's highest tides. Notably, compared with 2015, pleasure visitors in 2017 are more likely to report they visited a beach or went hiking.

Participation in Outdoor Activities  
*Among Net Pleasure Visitors*



Source: Table N2

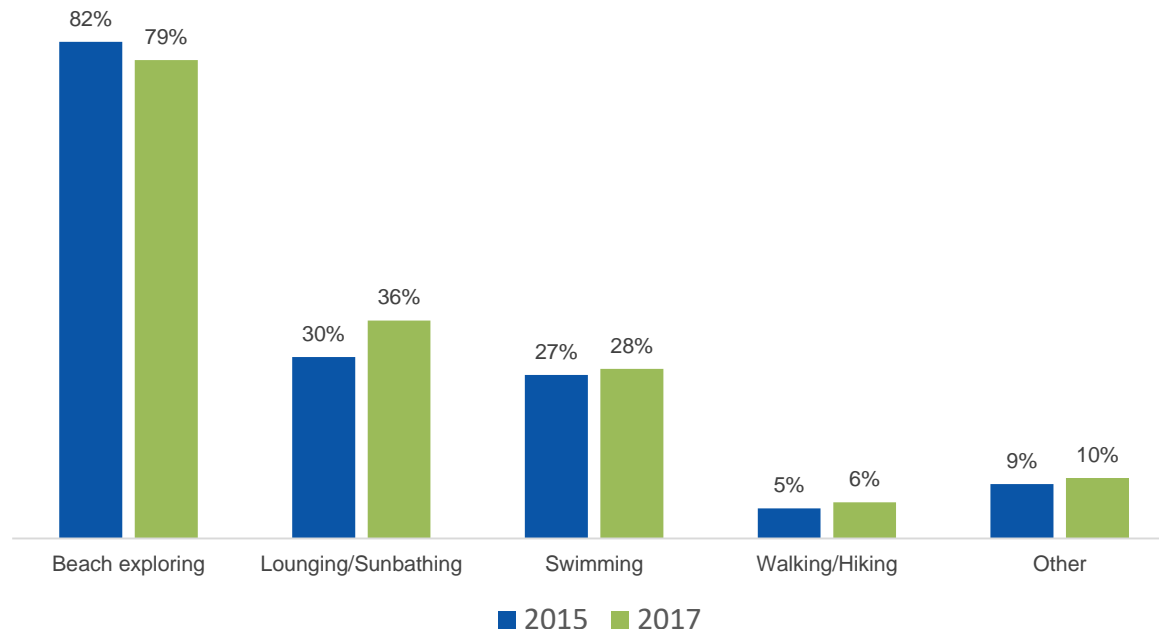
Note: No comparable 2010 data



# OUTDOOR ACTIVITIES

Participation in beach activities in 2017 is similar to 2015, with the exception of a increase in those who participated in lounging/sunbathing. Among those who visited a beach, beach exploring is the most popular activity, while over one-third indicated they visited a beach to lounge/sunbathe, and three in ten went swimming.

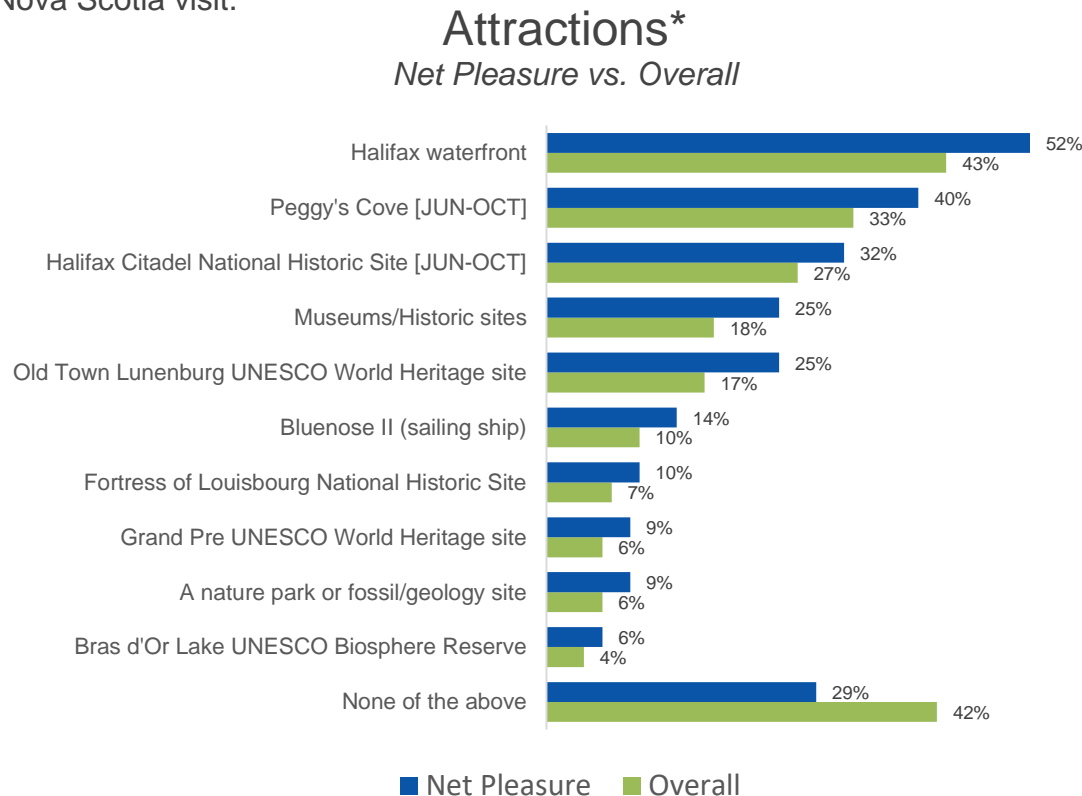
Participation in Beach Activities  
*Among Those Visiting a Beach*



Source: Table N4c  
Note: No comparable 2010 data

# ATTRACTIONS, EVENTS AND ACTIVITIES

The Halifax waterfront remains the most popular attraction among visitors, while Peggy's Cove, Halifax Citadel, museums/historic sites, Old Town Lunenburg and the Bluenose II were visited by at least one in ten visitor parties. Pleasure visitors are more likely than other visitors to report visiting at least one attraction during their Nova Scotia visit.



Source: Table N3

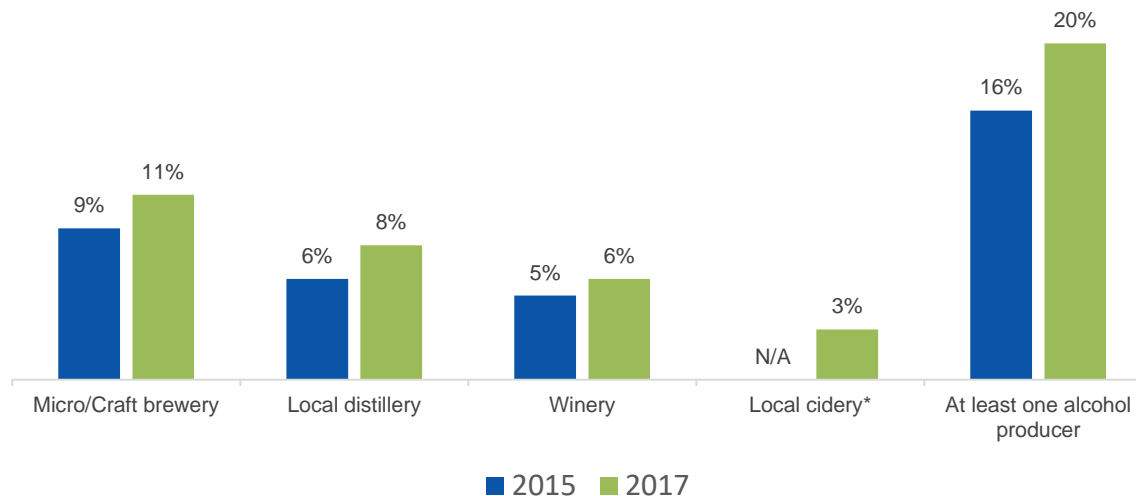
Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

# ATTRACTIONS AND EVENTS

In 2017, one in five visitor parties visited at least one local alcohol producer during their Nova Scotia visit. Overall, alcohol producer visitation has increased in 2017 across all producer types compared with 2015.

## Nova Scotia Alcohol Producer Visitation *Among All Visitors*



Source: 2015 – N3, 2017 - Table N3e

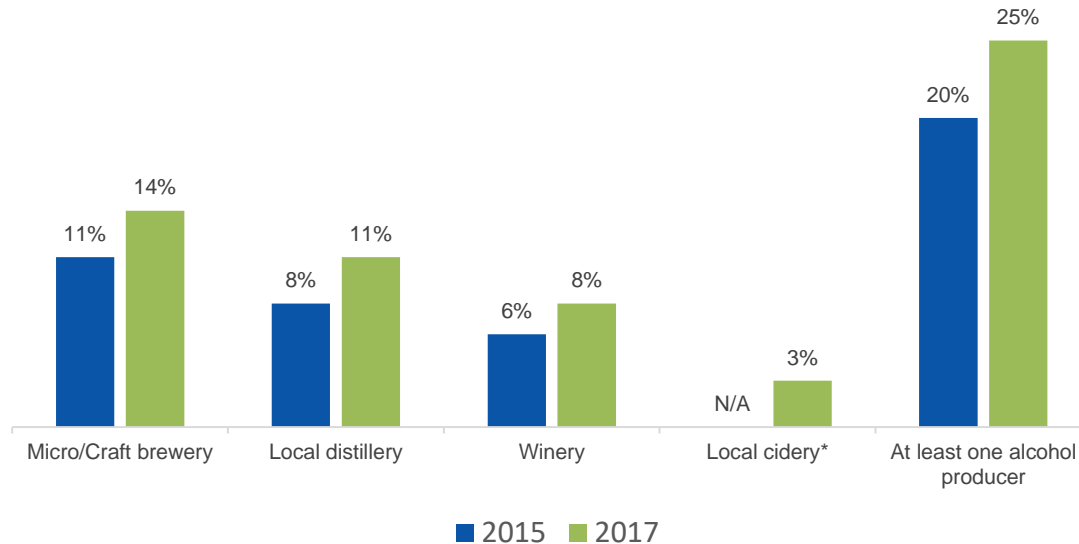
Note: No comparable 2010 data

\*Data only available for 2017

# ATTRACTIONS AND EVENTS

Compared with 2015, net pleasure visitors are more likely to visit a local alcohol producer in 2017, with one-quarter visiting at least one local alcohol producer during their Nova Scotia visit.

## Nova Scotia Alcohol Producer Visitation *Among Net Pleasure Visitors*



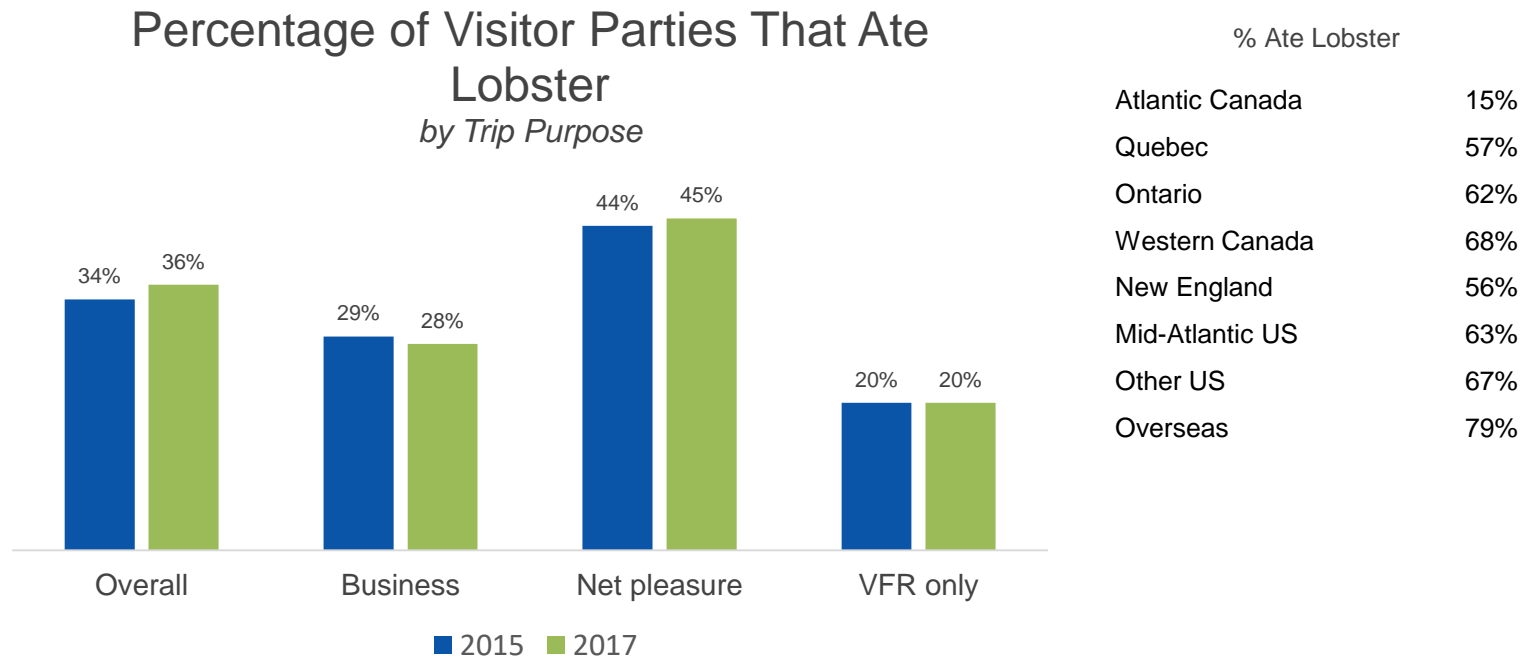
Source: 2015 – N3, 2017 - Table N3e

Note: No comparable 2010 data

\*Data only available for 2017

# LOBSTER

Lobster remains an important part of the visitor experience, particularly among pleasure visitors. The appeal of lobster remains highest among visitors from outside Atlantic Canada.



Source: Table N5  
Note: No comparable 2010 data



# SATISFACTION

# SATISFACTION WITH NOVA SCOTIA

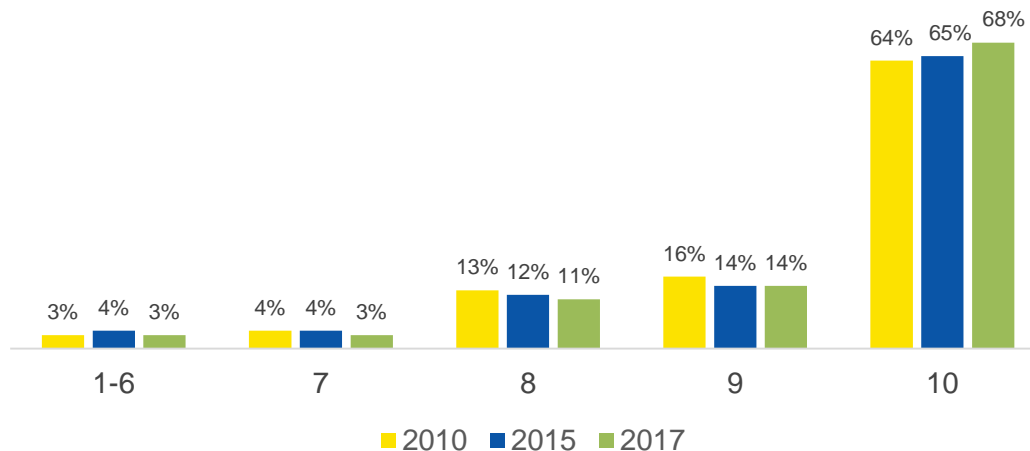
Similar to 2015 results, visitors to Nova Scotia in 2017 are highly satisfied with their Nova Scotia experience. Looking at likelihood to recommend Nova Scotia, two-thirds offered the highest rating of '10', while one-quarter offered ratings of '8' or '9'.

## Likelihood to Recommend Nova Scotia as a Place to Visit

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

Average Rating

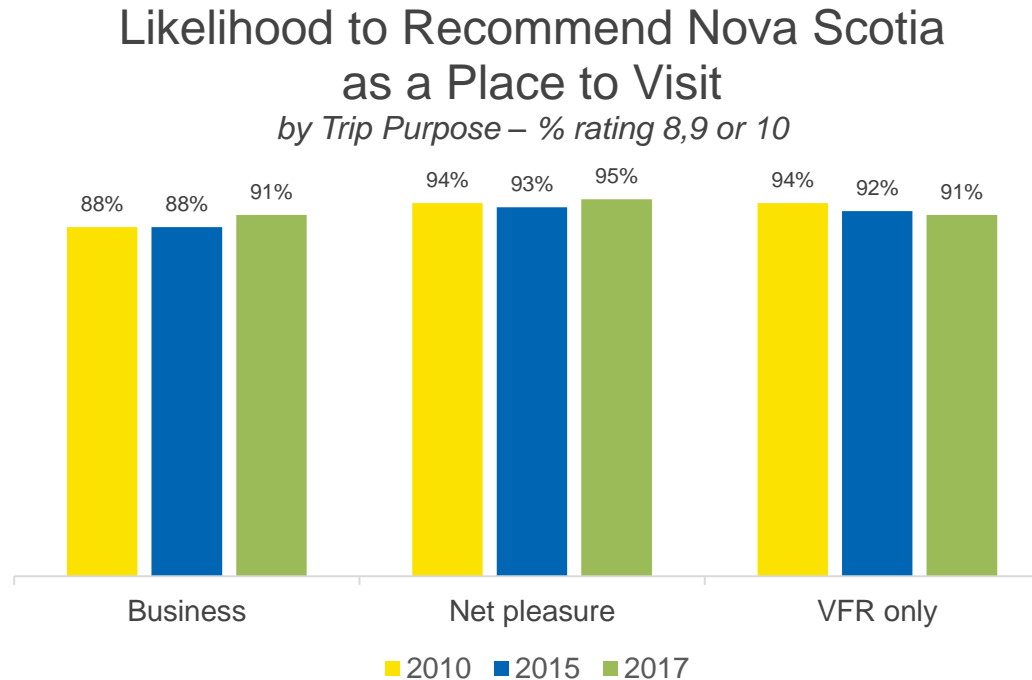
2010	9.3
2015	9.3
2017	9.4



Source: Table O1

# SATISFACTION WITH NOVA SCOTIA

Likelihood of recommending Nova Scotia remains high across trip purposes.



Source: Table O1

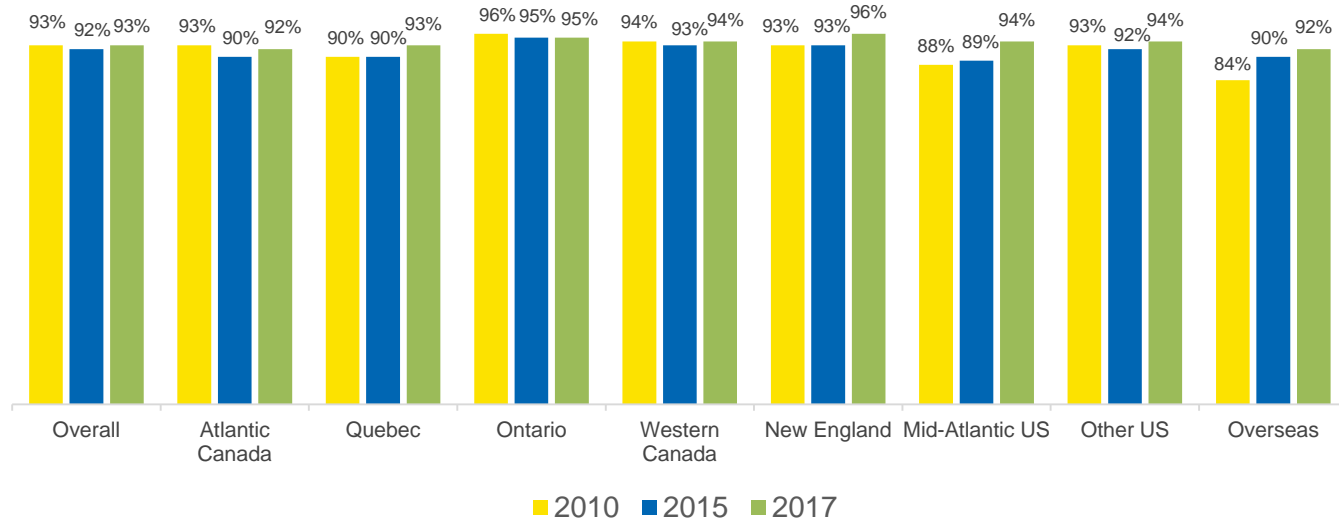


# SATISFACTION WITH NOVA SCOTIA

Likelihood of recommending Nova Scotia remains high across all markets.

## Likelihood to Recommend Nova Scotia as a Place to Visit

*by Market Region – % rating 8,9 or 10*

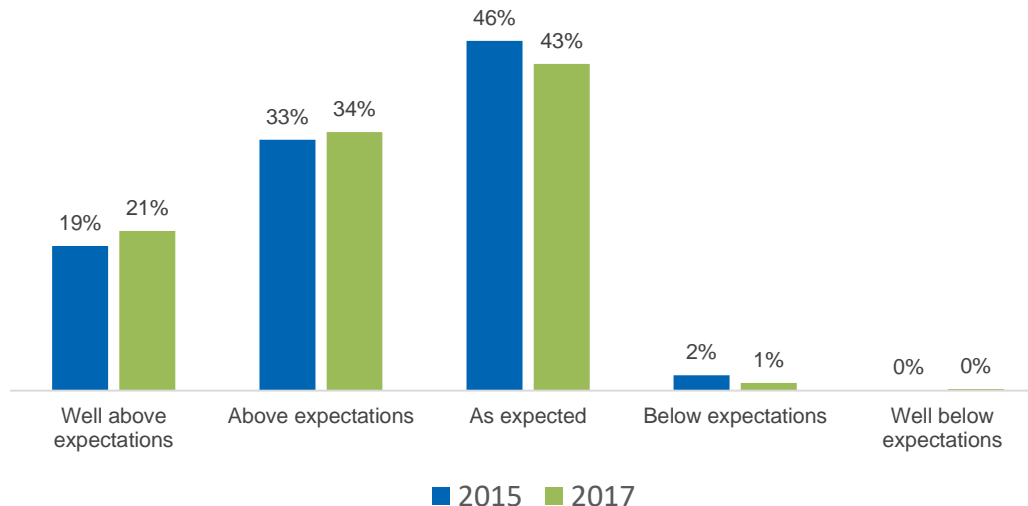


Source: Table O1

# SATISFACTION WITH NOVA SCOTIA

Consistent with their high levels of satisfaction, more than one-half of visitors indicate their Nova Scotia visit exceeded their expectations, while close to one-half had their expectations met. Only 1% of visitors state their expectations were not met.

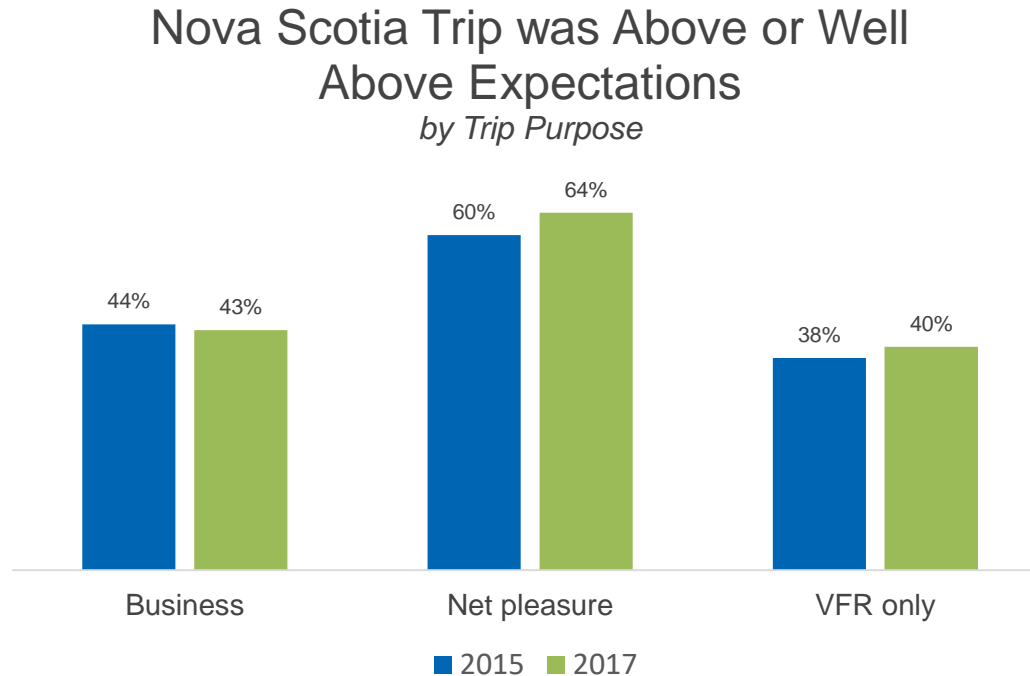
Nova Scotia Trip Compared with  
Expectations  
*Among All Visitors*



Source: Table O5  
Note: No comparable 2010 data

# SATISFACTION WITH NOVA SCOTIA

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

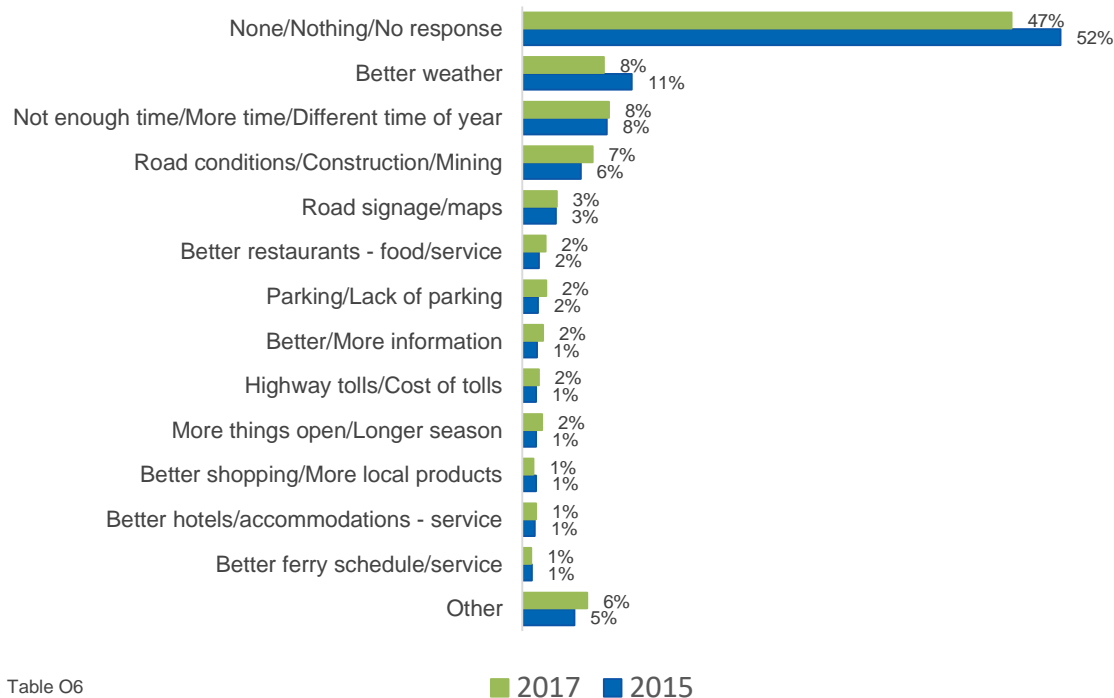


Source: Table O5  
Note: No comparable 2010 data

# OPPORTUNITIES FOR IMPROVEMENT

2017 visitors are slightly more likely to offer suggestions for improvement compared with 2015. The most common complaints were related to the weather and time. Less frequently suggested improvements include road conditions, road signage, restaurants and parking.

## Opportunities for Improving Nova Scotia Experience Among All Visitors



Source: Table O6  
Note: No comparable 2010 data

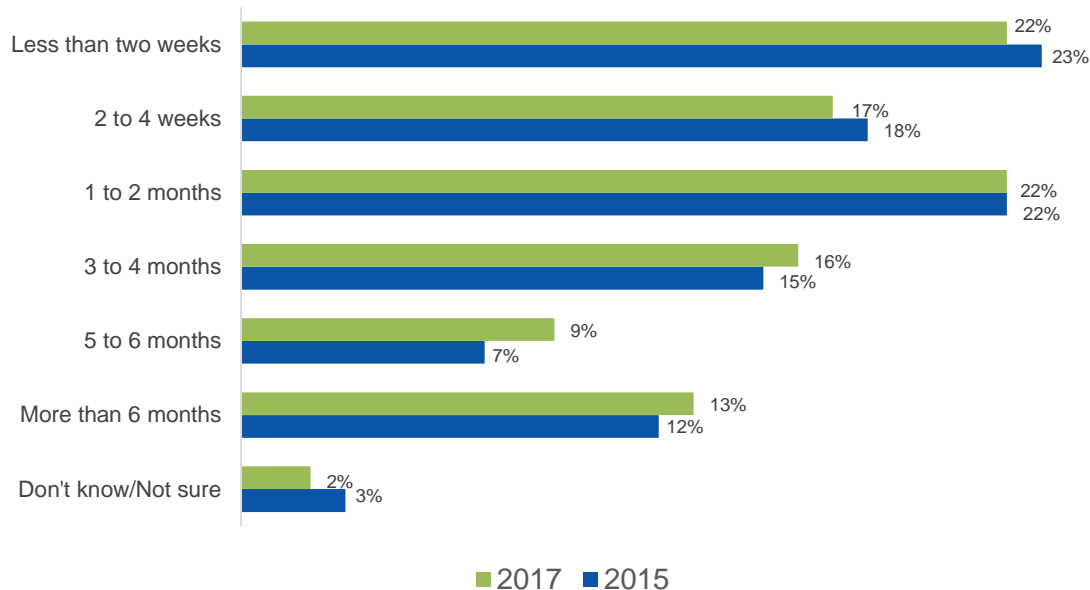
# TRIP PLANNING

# TRIP PLANNING

Between 2015 and 2017, 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

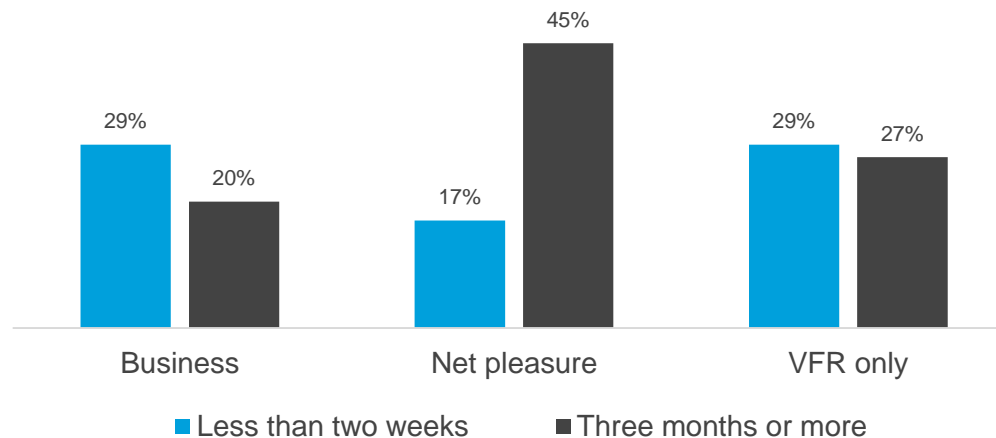


# TRIP PLANNING

Pleasure visitors report a longer planning cycle compared with business and VFR visitors. More than four in ten pleasure visitors made their decision to visit Nova Scotia at least three months prior to their trip, compared with fewer than three in ten VFR visitors and two in ten business visitors.

## How Far in Advance Decision Was Made to Visit

*by Trip Purpose – Among Those Responsible for Decision*



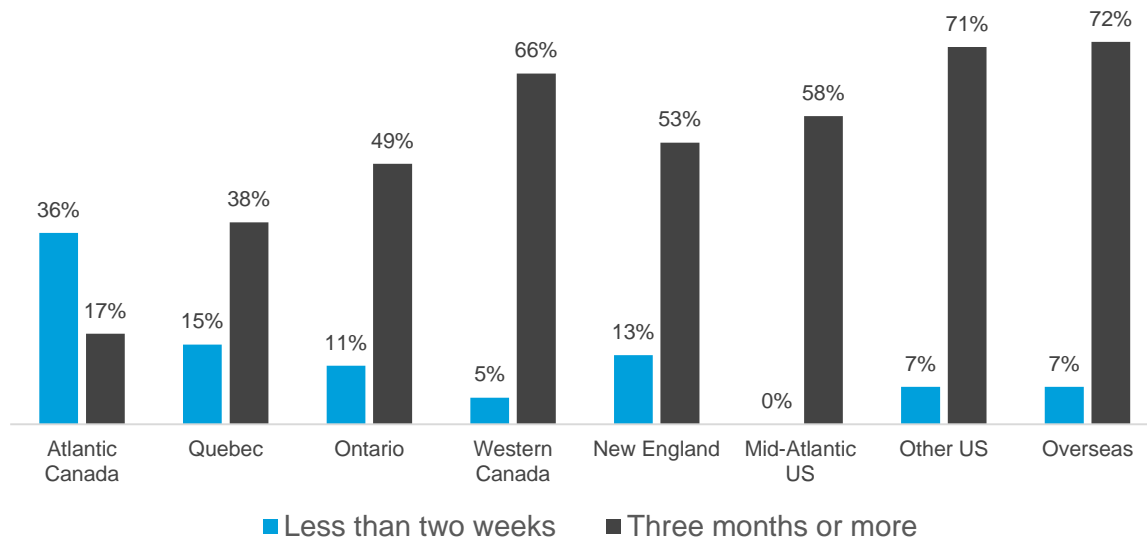
Source: Table T5

# 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, seven 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*



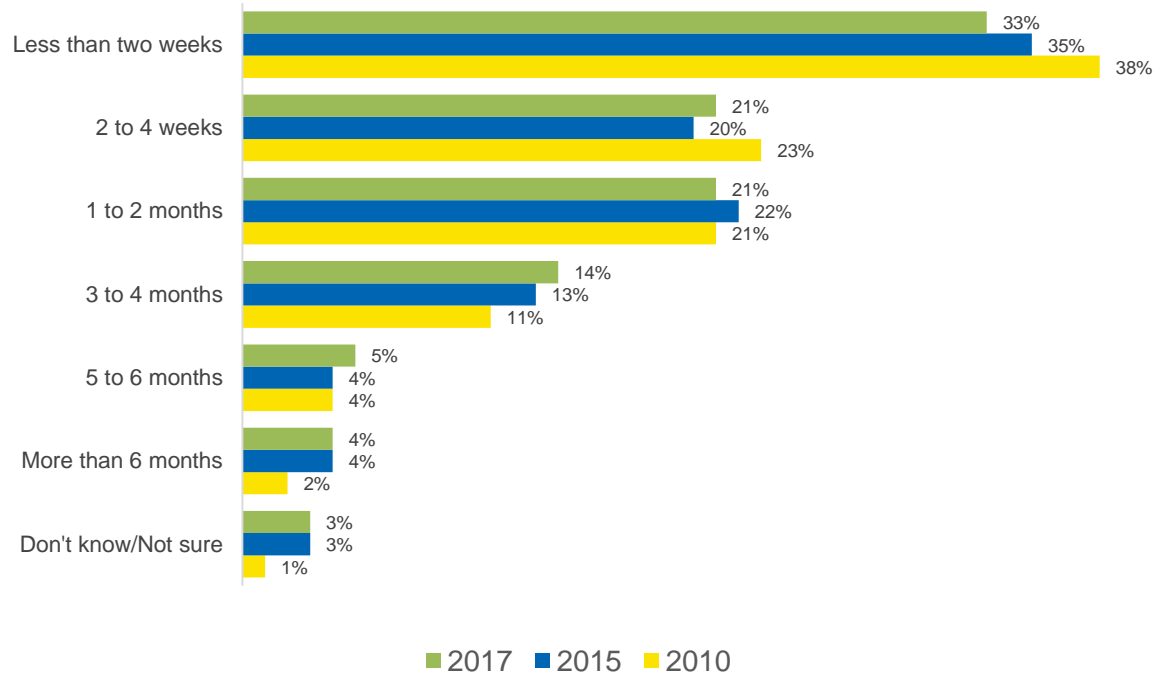
Source: Table T5



# BOOKING TRAVEL

Between 2010 and 2017 there is a trend towards visitors being increasingly likely to make their first booking less than two weeks before they arrive in Nova Scotia. Visitors are less likely to report making their first booking three months or more before their trip.

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

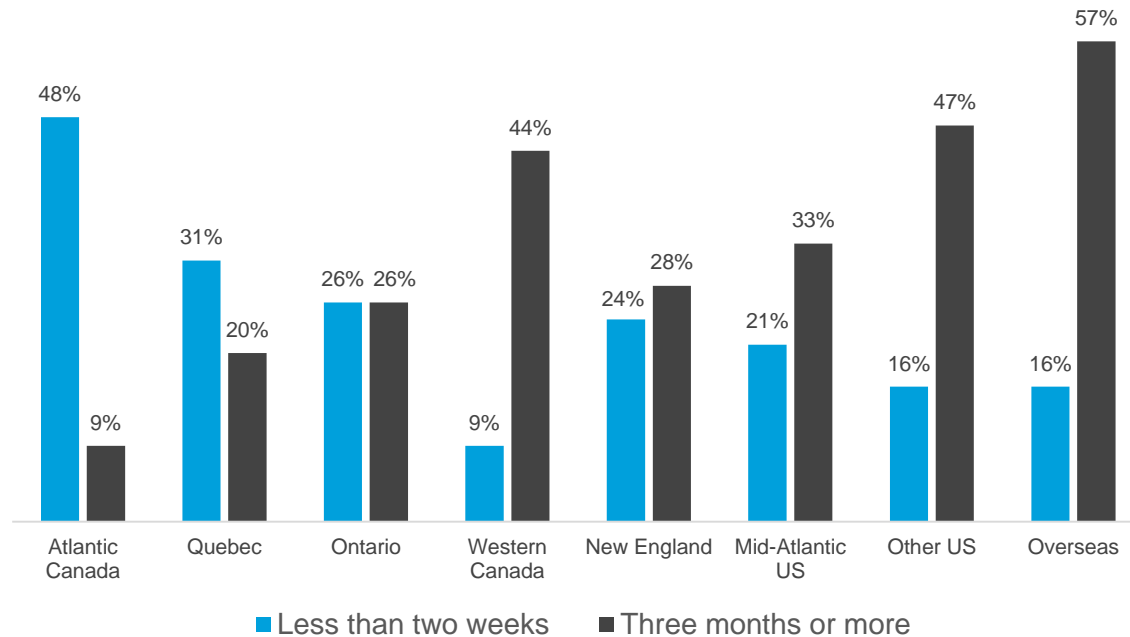


Source: Table T6

# 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 first booking for the trip.

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

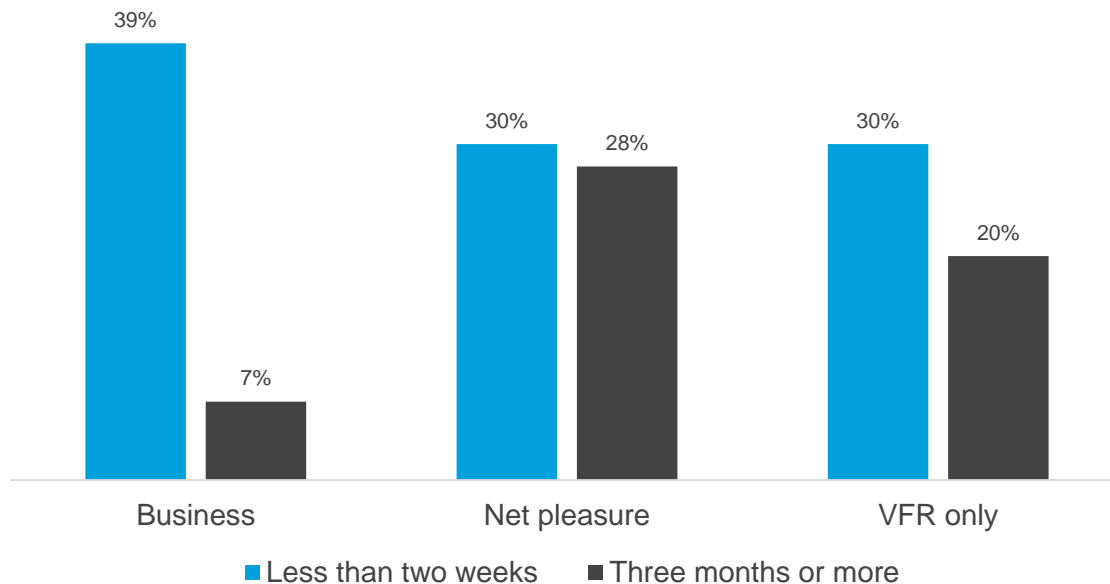


Source: Table T6

# DECISION TO TRAVEL

Net pleasure visitors tend to plan their trips more in advance than those visiting friends or relatives. Business visitors had the shortest booking cycle.

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



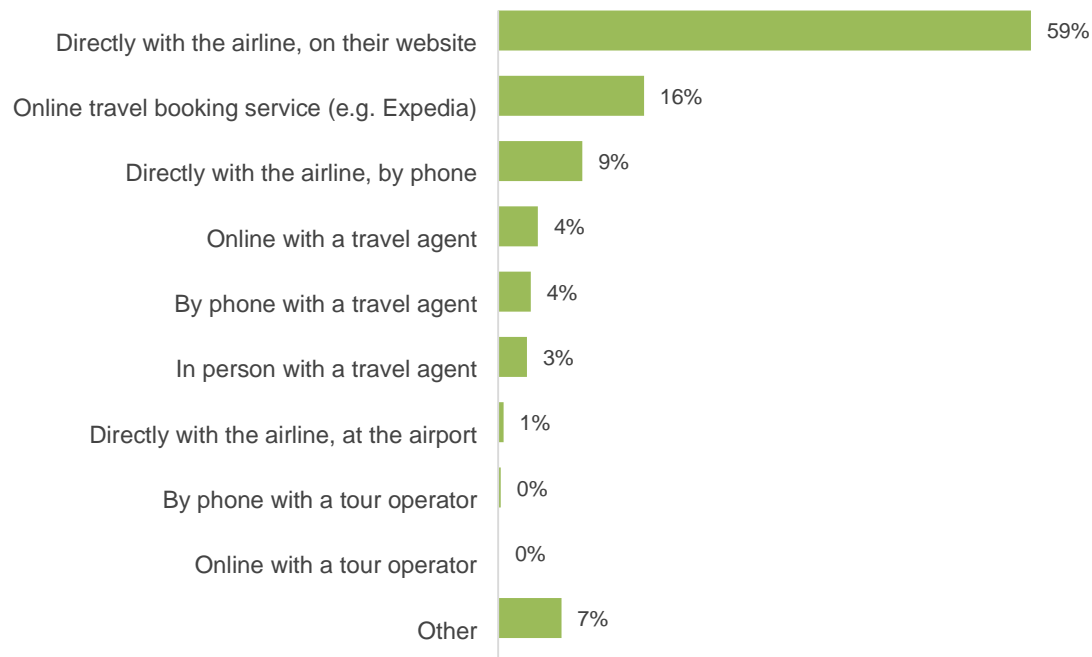
Source: Table T6

# BOOKING TRAVEL

Among those who booked airfare to or from Nova Scotia, approximately six in ten booked directly with the airline via the airline's website, and most booked online.

## How did you Book Your Airfare to/from Nova Scotia?\*

*Among Those who Made a Booking*



Source: Table T7ba

Note: Responses add to more than 100% because multiple bookings can be made during a single trip

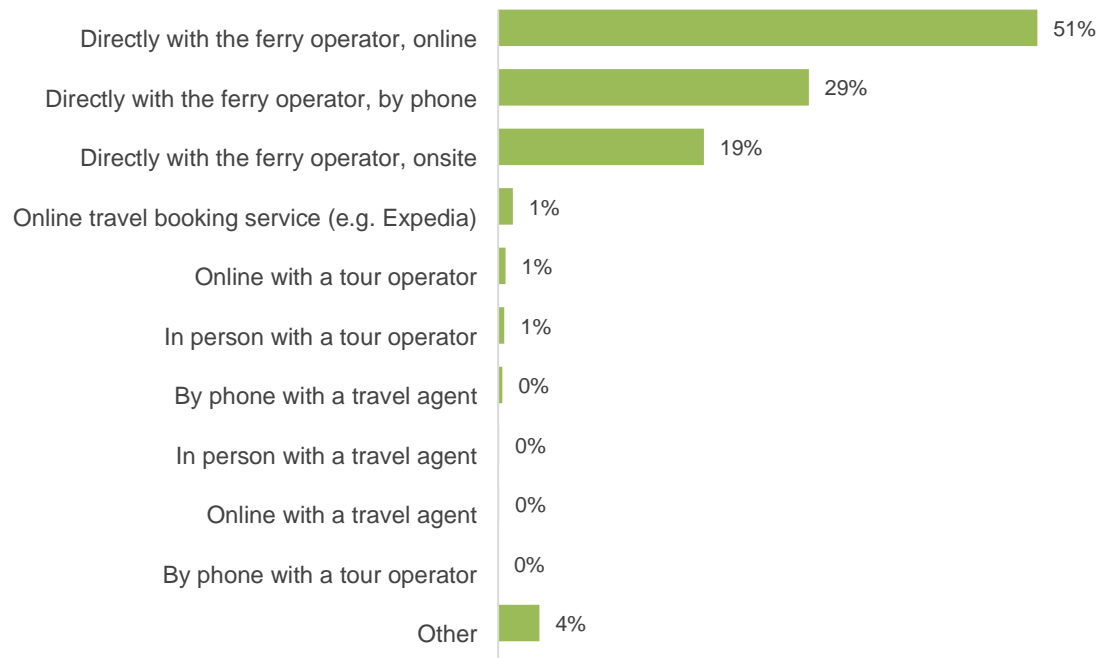
\* Responses based on data collected between June and October 2017

# BOOKING TRAVEL

Among those who booked ferry transportation, to or from Nova Scotia, one-half booked directly with the ferry operator via their website, and most booked online.

## How did you Book Your Ferry Transportation to/from Nova Scotia?\*

*Among Those who Made a Booking*



Source: Table T7bc

Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

# BOOKING TRAVEL

Among those who made bookings at the various accommodation types, the most popular way to make the booking was online, either via the property's website or an online booking service.

<b>How Did You Make Your Booking?</b> <i>Among Those Who Made a Booking – Fixed Roof Accommodations</i>							
	Hotel (n = 771)	Motel (n = 265)	Bed & Breakfast (n = 270)	Inn (n = 138)	Resort (n = 76)	Rented cottage, cabin or vacation home (n = 243)	Other* (n = 55)
Directly with property via the internet	36%	26%	40%	23%	37%	42%	30%
An online travel booking service (such as Expedia or Hotwire)	32%	45%	30%	36%	16%	15%	12%
Directly with property via phone	28%	28%	30%	29%	41%	21%	7%
Vacation rental website (Airbnb, Home Away, VRBO)	N/A	N/A	9%	N/A	N/A	17%	19%
Online with a travel agent	2%	0%	2%	1%	2%	0%	0%
In person with a travel agent	2%	1%	0%	2%	0%	0%	0%
At a Nova Scotia Visitor Information Centre	1%	1%	2%	2%	2%	1%	0%
Online with a tour operator	1%	1%	1%	1%	0%	1%	0%
By phone with a travel agent	1%	0%	0%	0%	2%	1%	0%
On the Novascotia.com website via its online reservation system	1%	2%	1%	4%	0%	1%	0%
Nova Scotia's provincial 1-800 number	1%	0%	0%	1%	2%	0%	0%
By phone with a tour operator	1%	0%	1%	0%	0%	0%	2%
In person with a tour operator	0%	1%	0%	0%	0%	0%	0%
Directly with the property via onsite/in person	N/A	N/A	N/A	N/A	N/A	N/A	3%
Other	7%	10%	2%	11%	4%	7%	22%

Source: Table T7ca – T7cl

\*Other includes hostels, hunting/fishing lodge, etc.

Percentages may add up to more than 100% because a visitor might book multiple types of accommodations through multiple booking methods during a single trip.

# BOOKING TRAVEL

The most popular method of booking a campsite at national or provincial park campgrounds was the Parks Canada reservation system, followed by directly with the property via phone. With commercial campgrounds the trend was reversed where phone bookings were most popular, followed by online bookings.

<b>How Did You Make Your Booking?</b> <i>Among Those Who Made a Booking - Campgrounds</i>		
	National or provincial park campground (n = 85)	Commercial campground/trailer park (n = 82)
Parks Canada reservation system	45%	N/A
Directly with property via phone	26%	58%
Directly with the property via onsite/in person	12%	9%
On the Novascotia.com website via its online reservation system	8%	4%
Directly with property via the internet	8%	36%
An online travel booking service (such as Expedia or Hotwire)	0%	2%
In person with a tour operator	0%	1%
In person with a travel agent	3%	0%
Online with a tour operator	1%	0%
By phone with a travel agent	1%	0%
Other	4%	10%

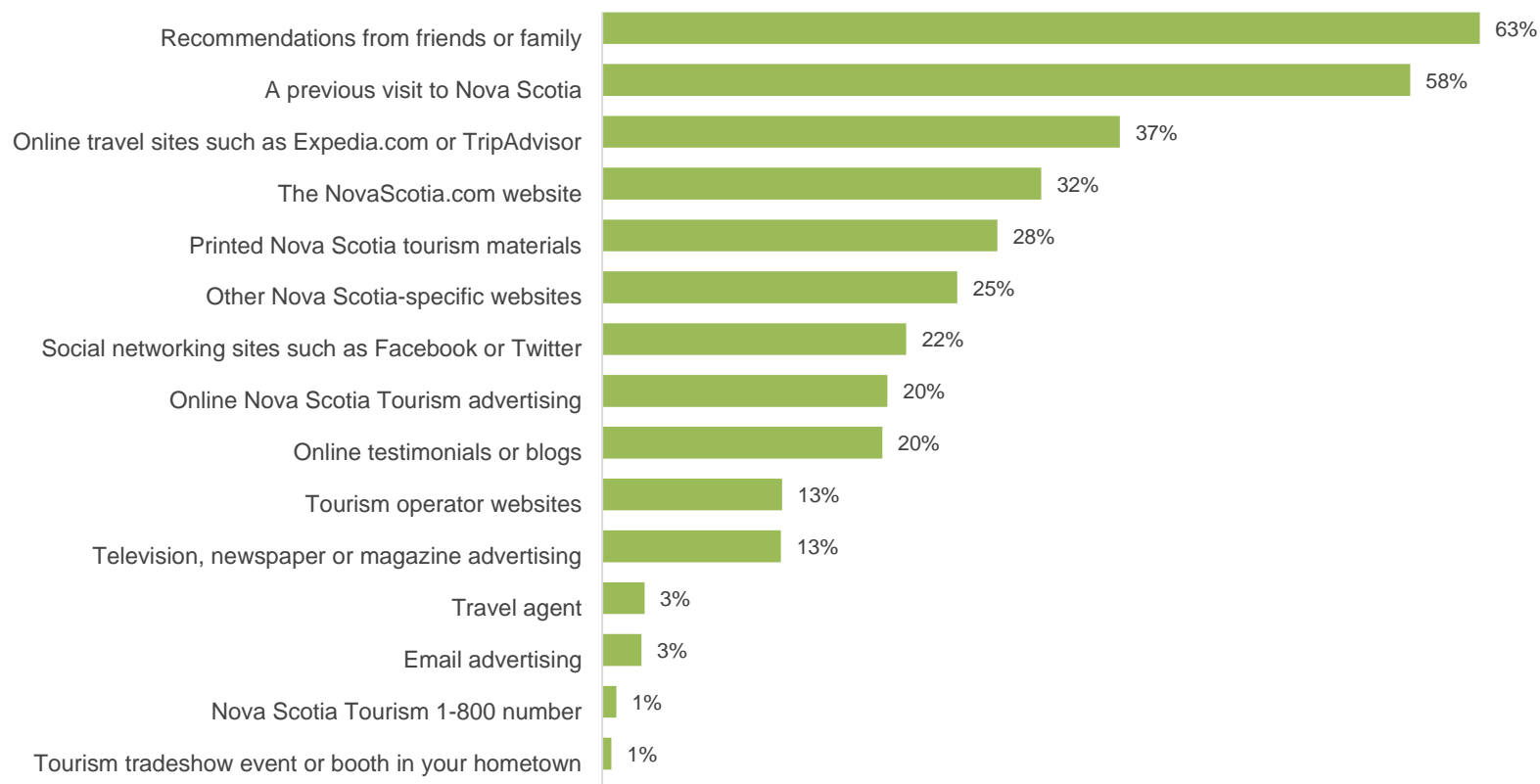
Source: Table T7ci – T7cg

Percentages may add up to more than 100% because a visitor might book multiple types of accommodations through multiple booking methods during a single trip.

# INFORMATION SOURCES

Recommendations from friends and family and a previous trip to Nova Scotia are the top two information sources used to develop travel plans. Online travel sites, the NovaScotia.com website and printed Nova Scotia tourism materials are also popular.

## Information Sources Used to Develop Travel Plans\*



Source: Table T0 Summary  
Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

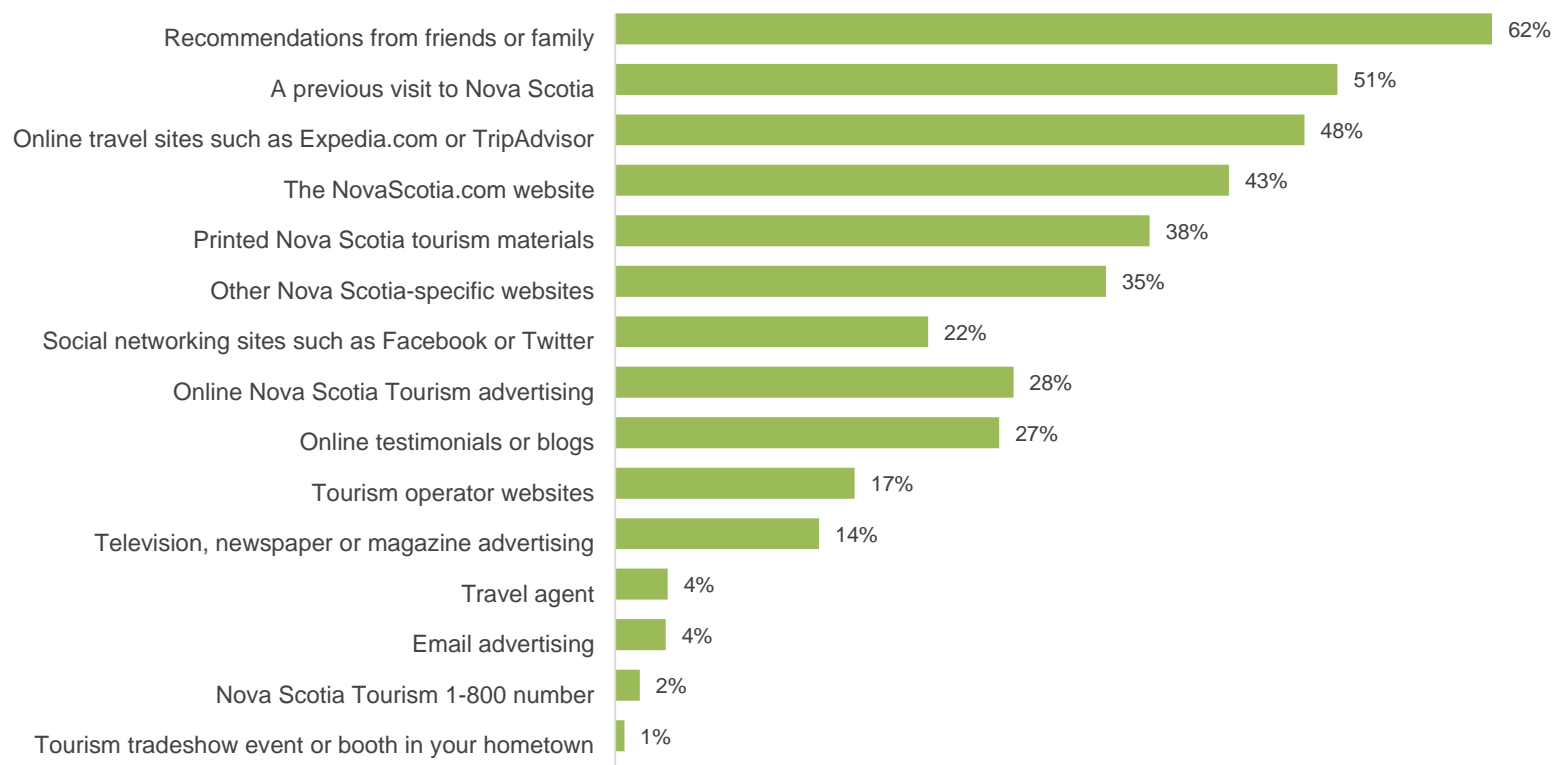


# INFORMATION SOURCES

The information sources used to develop trip plans among pleasure visitors were similar to those used by the average Nova Scotia visitor.

## Information Sources Used to Develop Travel Plans\*

*Among Pleasure Visitors*



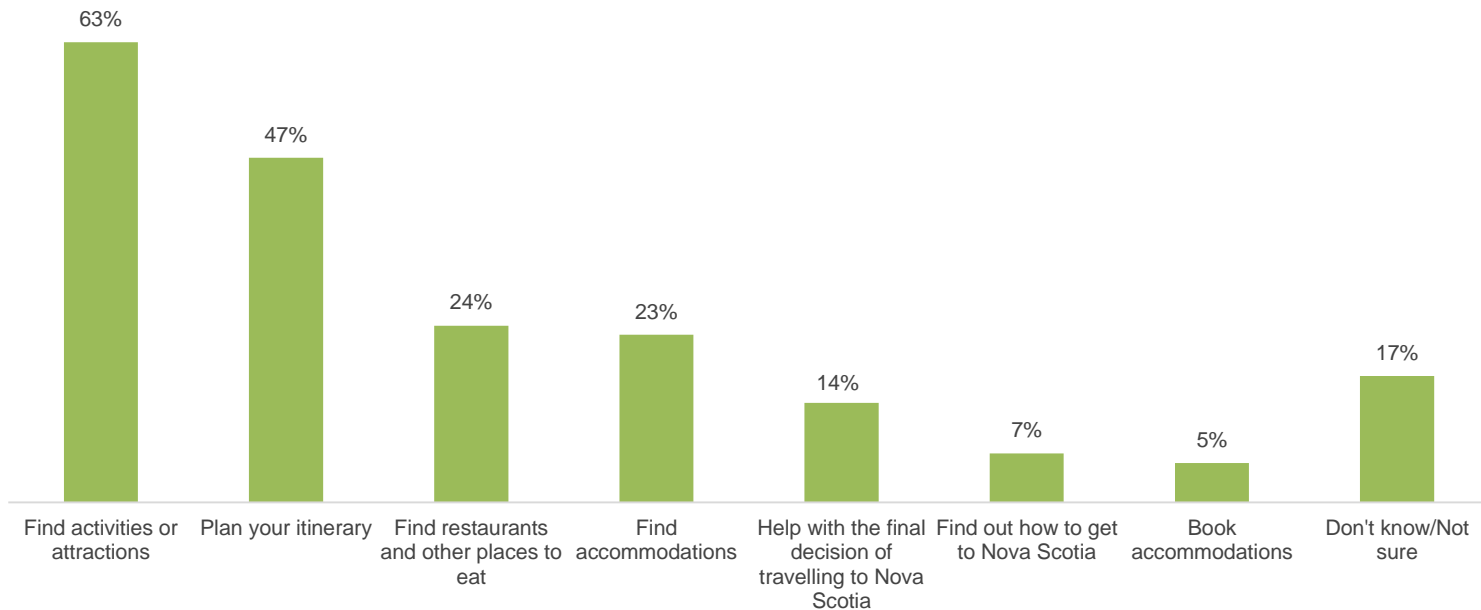
Source: Table T0 Summary  
Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

# NOVASCOTIA.COM

Those who visited NovaScotia.com used the website before their trip began to find activities or attractions, itinerary planning, to find restaurants and to find accommodations.

## How did you Use NovaScotia.com Before Your Trip *Among Those Who Used the Website*



Source: Table T2a – T2b

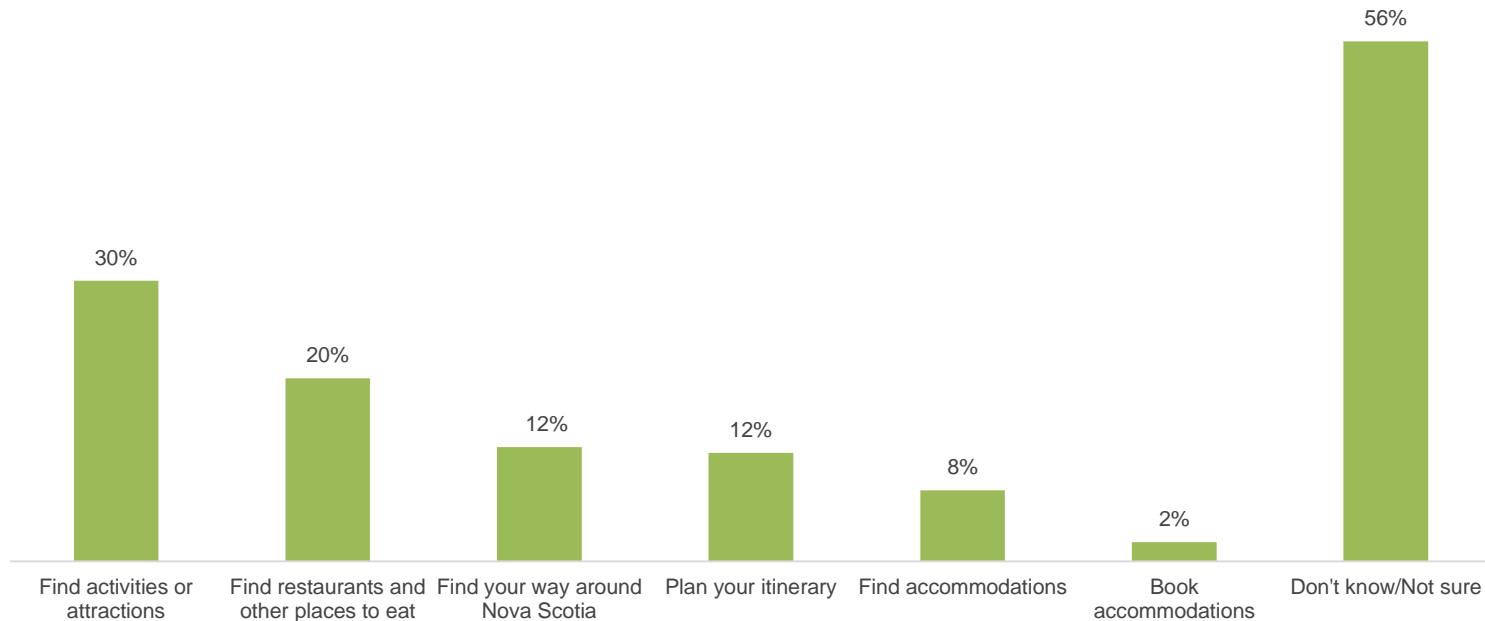
Note: No comparable data for 2010 or 2015

\* Responses based on data collected  
between June and October 2017

# NOVASCOTIA.COM

Those who visited NovaScotia.com used the website during their Nova Scotia trip to find activities or attractions, to find restaurants, to find their way around Nova Scotia and to plan their itinerary.

## How did You Use NovaScotia.com During Your Trip *Among Those Who Used the Website*



Source: Table T2a – T2b

Note: No comparable data for 2010 or 2015

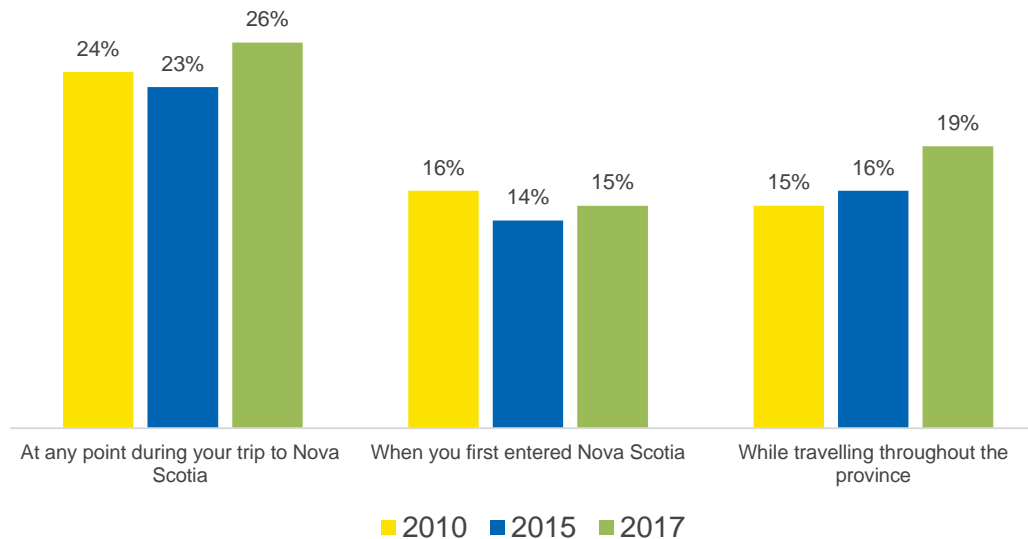
\* Responses based on data collected between June and October 2017

# VISITOR INFORMATION CENTRES

# VISITOR INFORMATION CENTRES

The incidence of stopping at a provincial or local Visitor Information Centre (VIC) in 2017 is up slightly compared with 2015. Overall, about one-quarter of visitors report stopping at a VIC while in Nova Scotia.

## Visited a Visitor Information Centre *Among All Visitors*

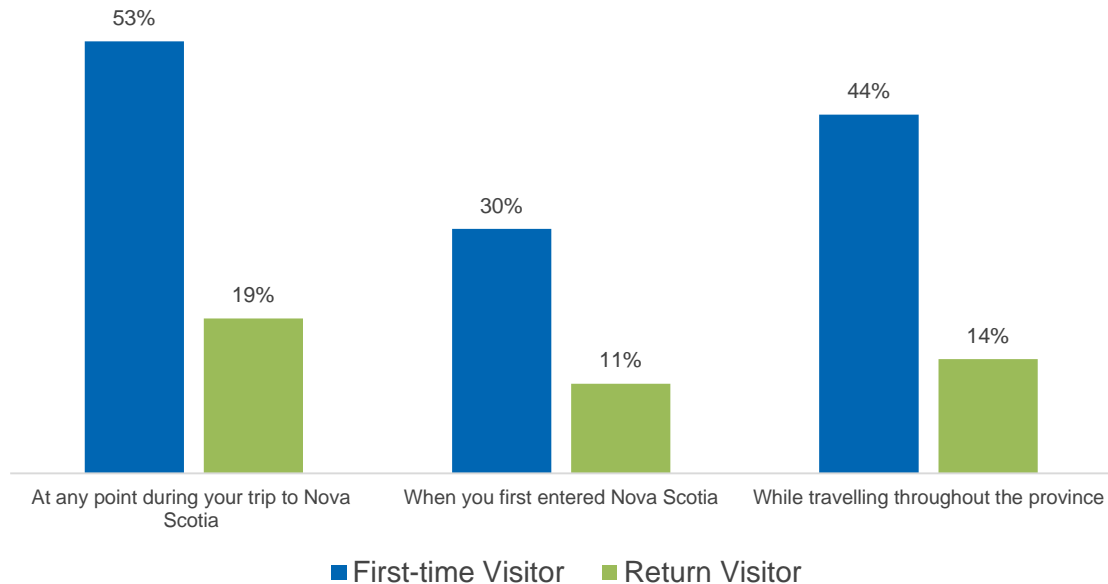


Source: Table T9

# VISITOR INFORMATION CENTRES

Visitation to VICs is largely driven by first-time visitors to the province. Notably, more than one-half of first-time visitors to Nova Scotia reported stopping at a Visitor Information Centre at some point during their Nova Scotia visit.

Visited a Visitor Information Centre  
*First-time vs. Return Visitors*

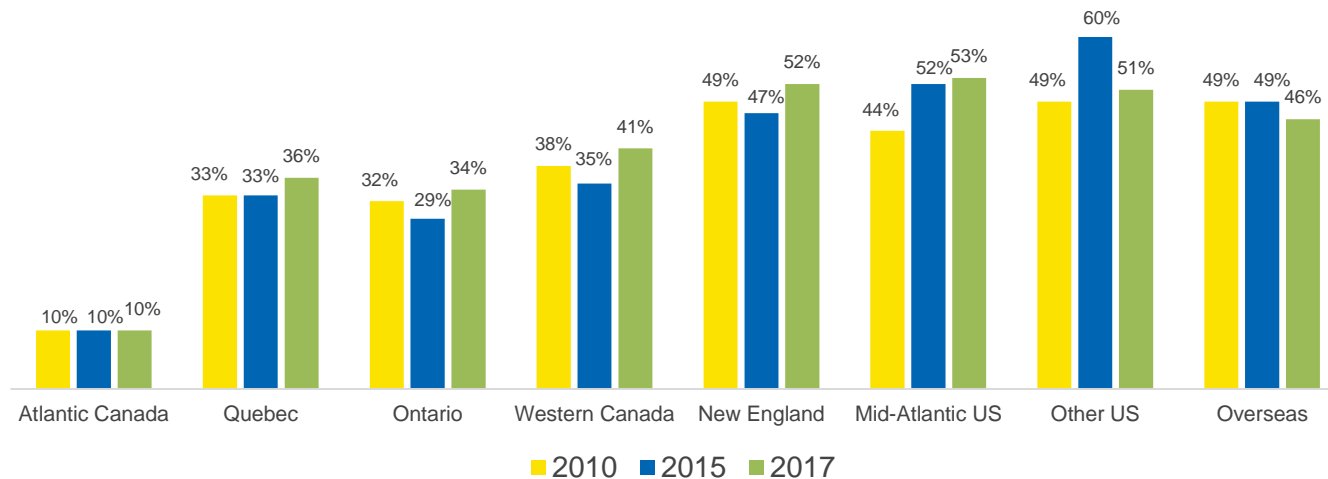


Source: Table T9

# VISITOR INFORMATION CENTRES

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

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

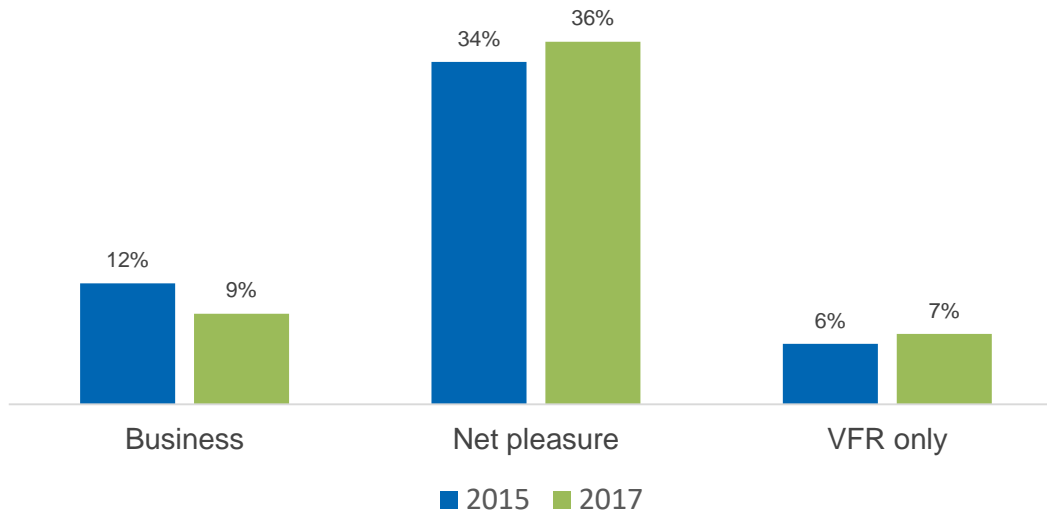


Source: Table T9

# VISITOR INFORMATION CENTRES

Pleasure visitors are 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*



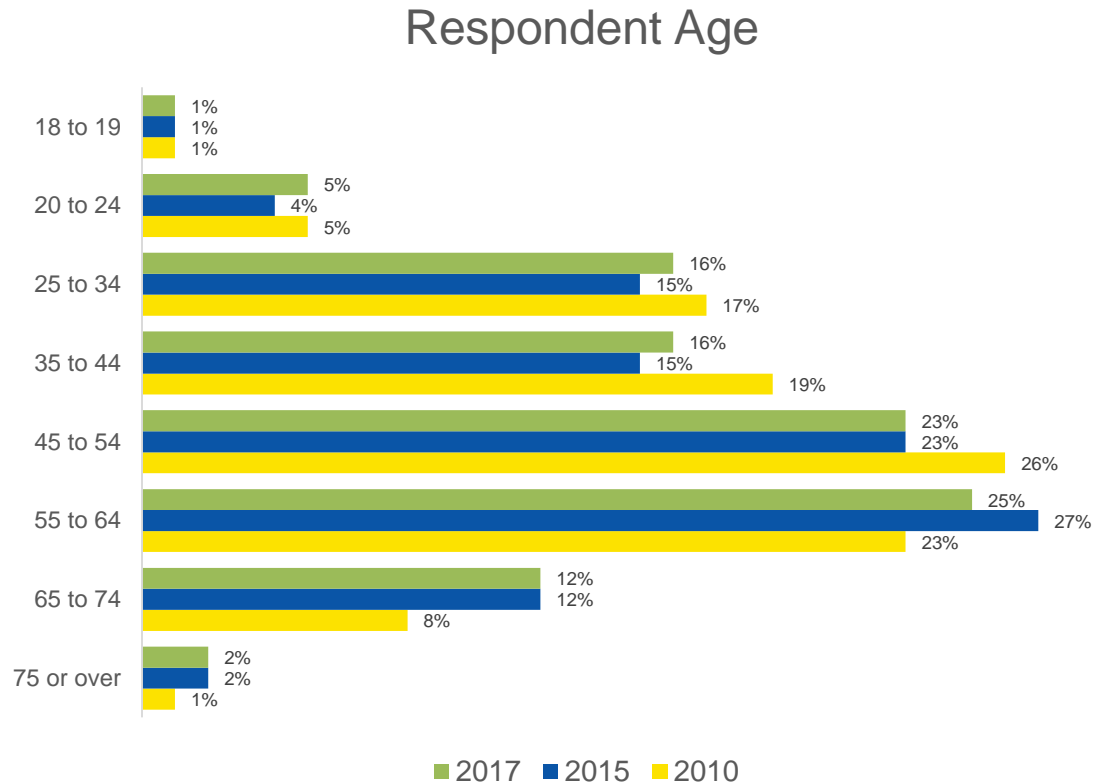
Source: Table T9



# DEMOGRAPHICS

# AGE

The single largest age group among survey respondents is 55 to 64 years. Four in ten respondents are aged 55 or older.

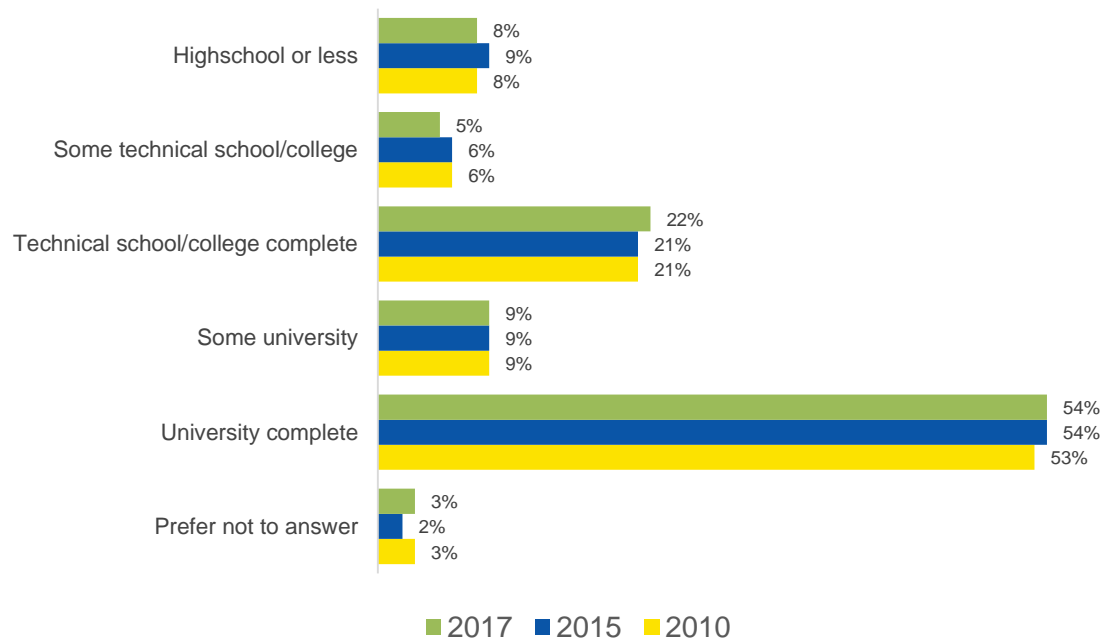


Source: Table V2

# EDUCATION

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

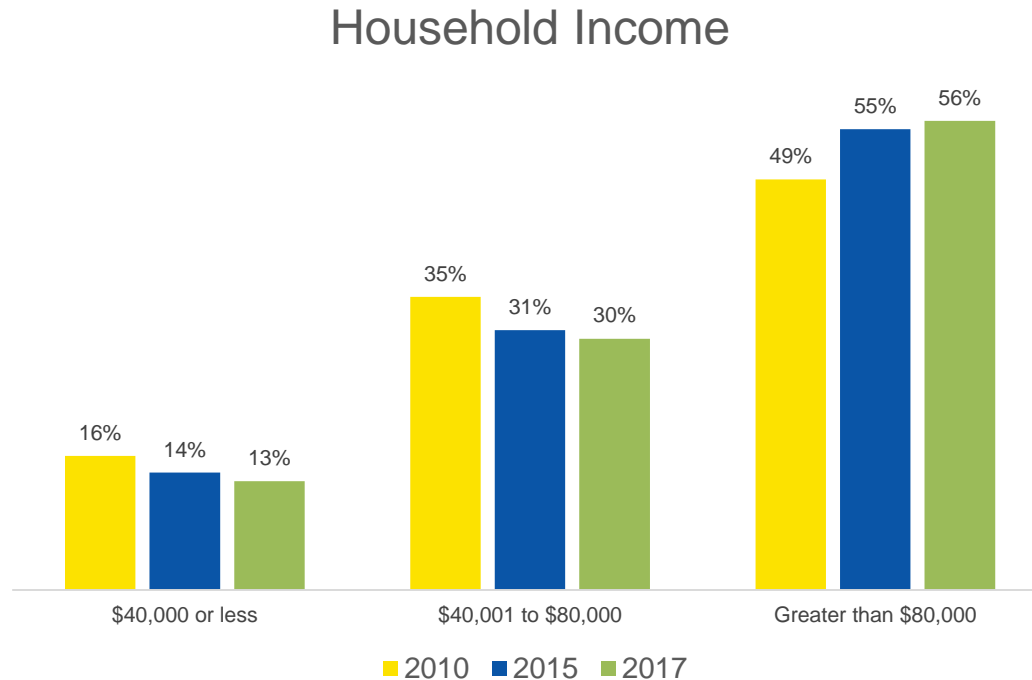
## Highest Level of Education in Household in Visiting Party



Source: Table V4

# HOUSEHOLD INCOME

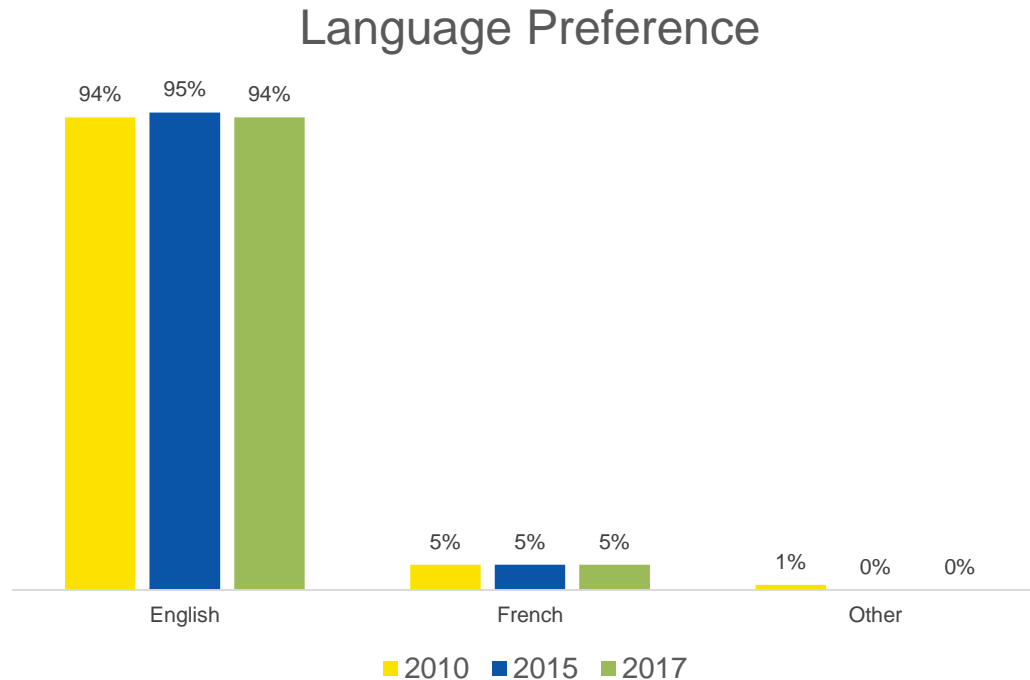
The majority of visitors to Nova Scotia report household incomes higher than \$80,000.



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.

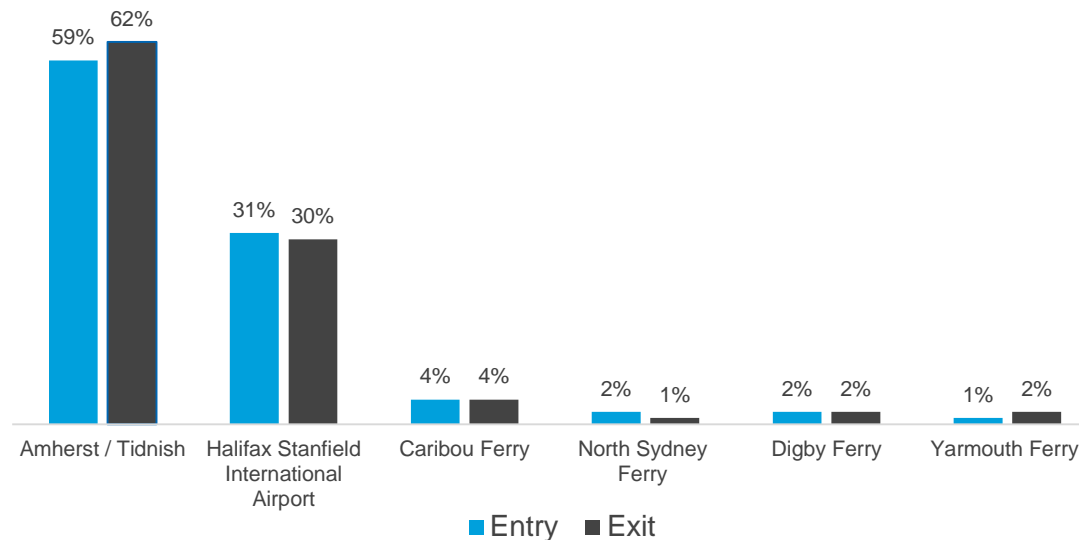


Source: Table T11

# 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