
2010 Nova Scotia Visitor Exit Survey – Regional Report

A Look at Visitors Who Included the Bay of Fundy and Annapolis Valley in their Trip to Nova Scotia

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

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Introduction

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

This report profiles visitors who travelled to the Bay of Fundy and Annapolis Valley during their trip to Nova Scotia. Please note that trip characteristics included in this report relate to the entire trip, not just their stay within this tourism region.

Tables referenced within this report are found at <http://www.gov.ns.ca/econ/tourism/research/visitor-exit-survey.asp>, and show detailed results by tourism region (see Regional VES Data Tables).

For more information on visitation to the province, the full VES report and regional reports for the other tourism regions are available online at the above noted address.

For further information on this study, please contact:

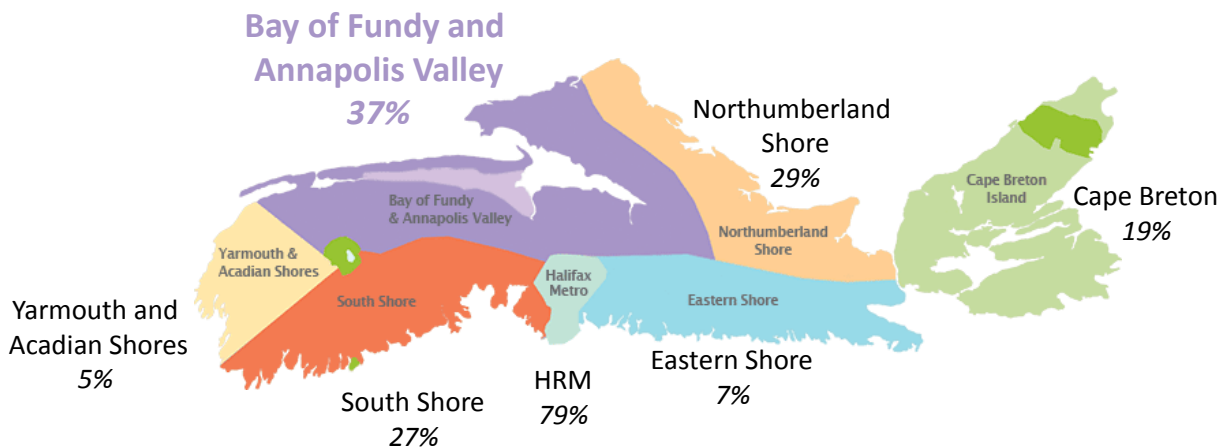
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A Look at Visitors Who Included the Bay of Fundy and Annapolis Valley in their Trip to Nova Scotia

This report profiles visitors to the Bay of Fundy and Annapolis Valley. The map below shows that the Bay of Fundy and Annapolis Valley was visited by close to four in ten of all visitors to the province, the second most visited region of the province.

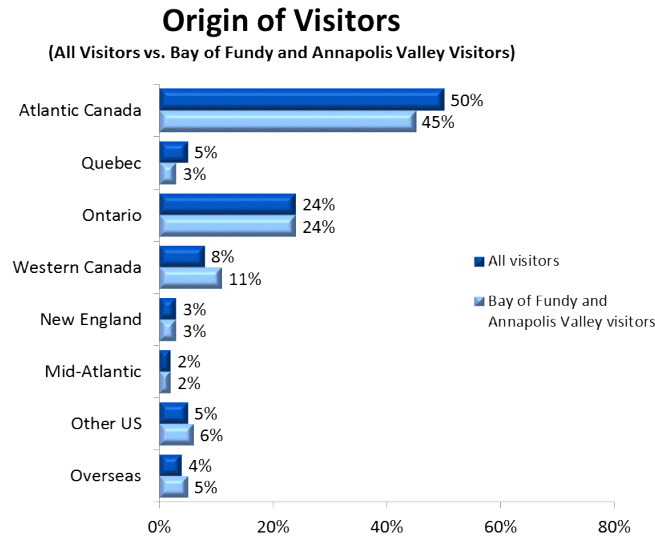


Travellers to each of the tourism regions were identified based on the data collected on the community traffic flow portion of the survey. For this analysis, only those who stopped for at least 30 minutes or stayed overnight in a community within a tourism region were considered to have visited that region. A listing of communities can be found in the Study Methodology section of the Full Report.



Overview of Bay of Fundy and Annapolis Valley Visitors

Close to four in ten Nova Scotia visitors stopped for at least 30 minutes or stayed overnight in the Bay of Fundy and Annapolis Valley. The vast majority of those visiting the Bay of Fundy and Annapolis Valley were Canadian, with close to one-half of all visitors originating from the Atlantic Provinces and one-quarter from Ontario. (Table A3)

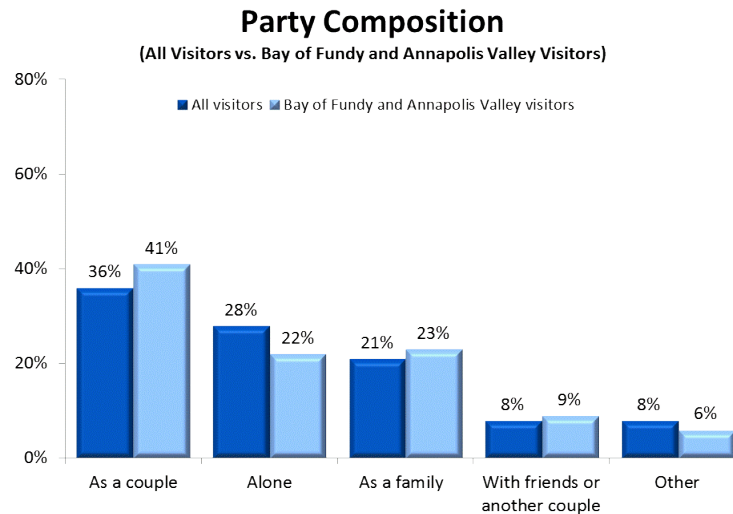


Compared with results among all visitors to the province, Atlantic Canadians were less likely to have visited the Bay of Fundy and Annapolis Valley, while travellers from Western Canada were slightly more likely to have visited the region.



Average Party Size and Composition

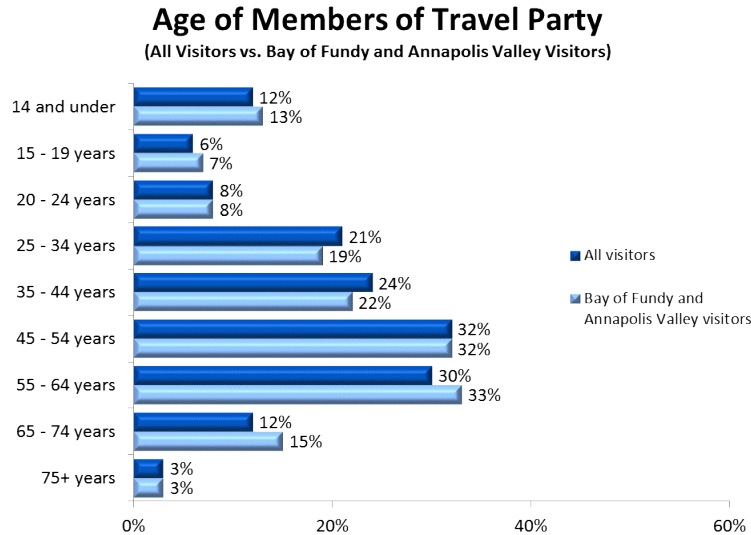
Four in ten visitors who visited the Bay of Fundy and Annapolis Valley travelled as a couple, while one-quarter travelled as a family and two in ten travelled alone. Pleasure travellers and those travelling by RV were more likely than their counterparts to have travelled as a couple, while business travellers were more likely to travel alone. (Table D10)



Compared with all visitors to Nova Scotia, those who included the Bay of Fundy and Annapolis Valley in their trip were somewhat more likely to be travelling as a couple or as a family, and less likely to have travelled to the province alone.



Among those who visited the Bay of Fundy and Annapolis Valley, parties travelling by RV were generally older than those travelling by car or airplane, and nearly all parties travelling by RV had a member 55 years of age or older. Pleasure travellers and those visiting friends or relatives were much more likely than business travellers to include a party member under the age of 25. (Table D11)

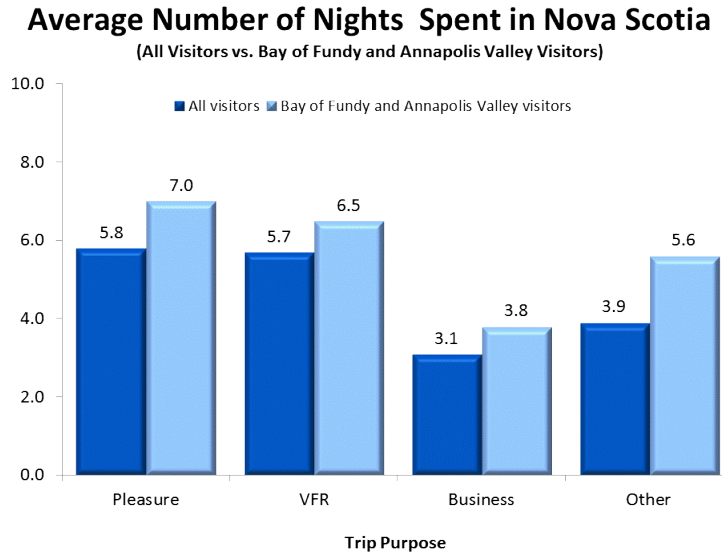


Travellers who included the Bay of Fundy and Annapolis Valley in their visit were somewhat more likely than all visitors to Nova Scotia to have a party member 55 years of age or older, or a party member under the age of 20.



Length of Stay

Among travellers who visited the Bay of Fundy and Annapolis Valley, the average length of stay in the province was 6.3 nights. Travellers originating from Atlantic Canada spent the least number of nights in the province (3.4), while overseas visitors spent the most number of nights (14.4). Visitors travelling by car (4.8) spent fewer nights compared with RV (8.7) and air travellers (9.0). Pleasure travellers (7.0) and those visiting friends or relatives (6.5) spent more nights, on average, in the province compared with those here for business purposes (3.8). (Table D1)



Visitors who included the Bay of Fundy and Annapolis Valley in their trip spent more nights, on average, compared with all visitors to the province (6.3 nights, compared with 5.1 nights among all visitors).



Trip Expenditures

Among those who visited the Bay of Fundy and Annapolis Valley, air travellers reported higher average expenditures compared with car and RV travellers. The average expenditure for pleasure travellers was higher than that reported by visitors who were here on business or visiting friends or family. Visitors originating from overseas and Western Canada reported higher average expenditures compared with others who visited the Bay of Fundy and Annapolis Valley. (Table D22/D24)

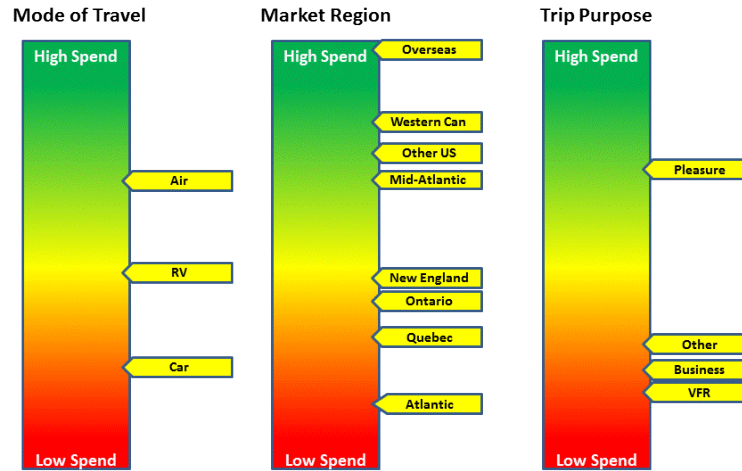
Average Expenditure Per Party (All Visitors vs. Bay of Fundy and Annapolis Valley Visitors)		
Type of Expenditure	All visitors	Bay of Fundy and Annapolis Valley visitors
Fixed roof accommodations	\$281	\$321
Campgrounds	\$9	\$15
Meals in restaurants/hotels/bars	\$238	\$278
Groceries and liquor	\$81	\$104
Gas, oil and/or auto repair	\$105	\$140
Car rental fees, including insurance	\$75	\$111
Local transportation (taxis, limos, etc.)	\$10	\$6
Bridge/Highway/Ferry tolls in Nova Scotia	\$5	\$6
NS cultural products	\$39	\$56
Clothing	\$70	\$70
Other shopping	\$70	\$79
Culture and entertainment	\$41	\$50
Sport and recreation	\$14	\$19
Parking	\$0	\$0
Total Expenditures	\$1,052	\$1,262

Compared with all visitors to Nova Scotia, travellers who included the Bay of Fundy and Annapolis Valley in their trip reported higher average expenditures.



For ease of comparison across key subgroups, total party expenditures (excluding major purchases) were indexed against the average party expenditures among the Bay of Fundy and Annapolis Valley visitors. The following graph illustrates the position on the expenditure index by mode of travel, market region and trip purpose. As is evident in the graph, visitors originating from overseas reported the highest expenditures, while visitors from Atlantic Canada and those visiting friends or relatives spent less.

Indexed Party Expenditures by Key Visitor Subgroups



Results among those visiting the Bay of Fundy and Annapolis Valley were generally consistent compared with all visitors to the province.



Trip Purpose

Among visitors who included the Bay of Fundy and Annapolis Valley in their visit to the province, over four in ten indicated the main reason they choose Nova Scotia was to visit with friends or family. A similar number were pleasure travellers, while just over one in ten were here for business. RV travellers were more likely than others to be pleasure travellers, while those arriving by air or car were more likely to be visiting friends or family. Visitors from overseas, the US, and Western Canada were more likely than others to be pleasure travellers, while visitors from Ontario were more likely than others to be visiting friends or relatives. Atlantic Canadians were slightly more likely than other visitors to be here for business. (Table D3)

Main Reason for Visiting Nova Scotia

(All Visitors vs. Bay of Fundy and Annapolis Valley Visitors)

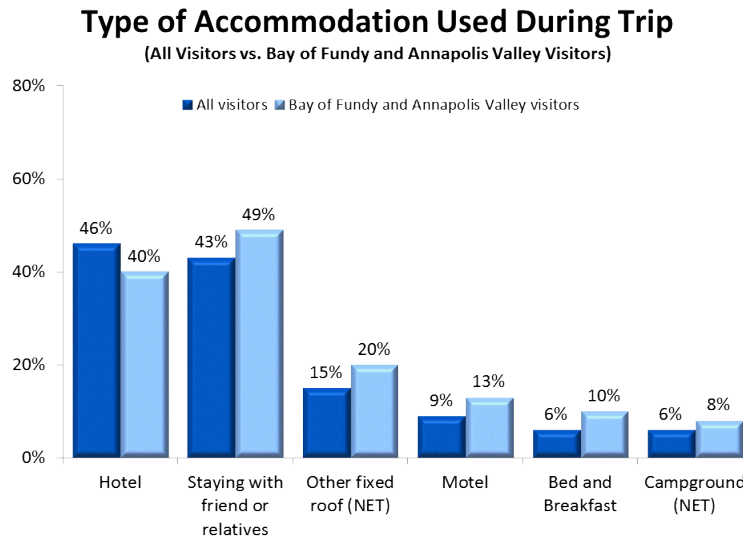


Travellers who visited the Bay of Fundy and Annapolis Valley were more likely than all visitors to Nova Scotia to be pleasure travellers or visiting friends or family. They were less likely to report they were visiting the province for business.



Accommodations

One-half of the Bay of Fundy and Annapolis Valley visitors reported they stayed with friends or relatives during their trip to Nova Scotia, while four in ten stayed in a hotel. The length of time Bay of Fundy and Annapolis Valley visitors spent with friends or family (6.0) was higher than the average number of nights spent in a hotel (2.7). Business travellers were most likely to have stayed in a hotel and stayed for, on average, 2.9 nights, as were pleasure travellers who stayed for, on average, 2.9 nights. The vast majority of those visiting friends or relatives stayed with friends or family for, on average, 6.3 nights. (Table D25)



Visitors who visited the Bay of Fundy and Annapolis Valley were more likely than all visitors to the province to indicate they stayed with friends or family while visiting Nova Scotia. While less likely to report staying at a hotel, Bay of Fundy and Annapolis Valley visitors were more likely than all visitors to the province to stay in other types of paid accommodations.

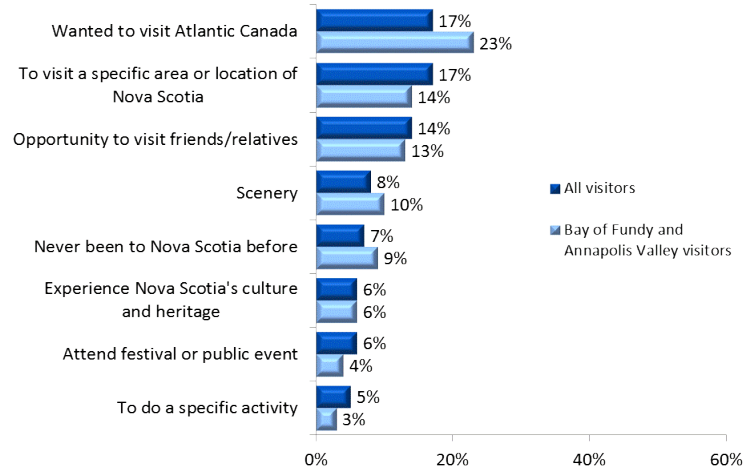


Motivations for Pleasure Travellers

One-quarter of visitors who included the Bay of Fundy and Annapolis Valley in their trip to Nova Scotia reported they wanted to visit Atlantic Canada, followed by approximately one in ten citing they wanted to visit a specific location, the opportunity to visit friends or family, the scenery, and having never visited before. (Table D8)

Main Reason Why Pleasure Travellers Chose Nova Scotia

(All Visitors vs. Bay of Fundy and Annapolis Valley Visitors)



Compared with all visitors to the province, those who visited the Bay of Fundy and Annapolis Valley were more likely to indicate they wanted to visit Atlantic Canada.



Participation in Activities

Approximately one-half of visitors to the Bay of Fundy and Annapolis Valley participated in outdoor activities while visiting Nova Scotia. Top activities included coastal sightseeing, hiking, beach exploring, and nature observing. Visitors were then asked if they visited any specific places or events, and over four in ten reported they visited the Halifax waterfront. Other top places or events visited included craft shops, museums and historic sites, nightclubs, local farms or food producers, and nature parks. (Tables N1, N2, and N3)

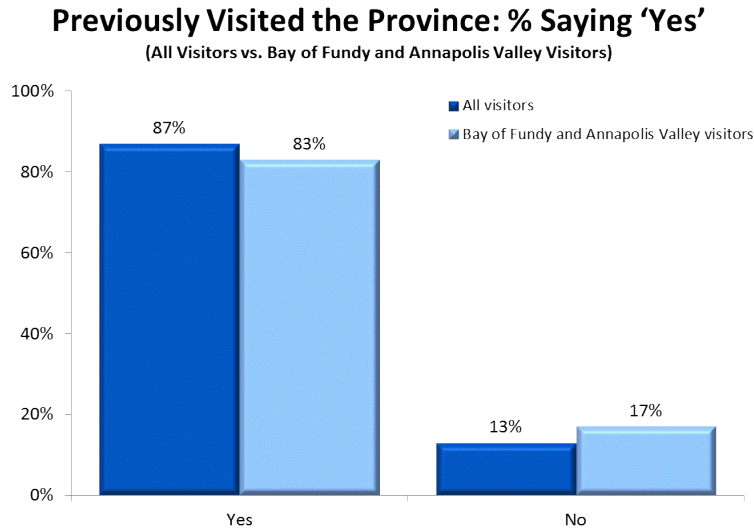
Participation in Outdoor Activities (% Saying Yes)			Places or Events Visited (% Saying Yes)		
	All visitors	Bay of Fundy and Annapolis Valley visitors		All visitors	Bay of Fundy and Annapolis Valley visitors
Coastal sightseeing	17%	23%	Halifax waterfront	42%	44%
Hiking (in wooded or coastal areas)	16%	22%	Craft shops/studios	29%	36%
Beach exploring	16%	21%	Nightclubs/Lounges/Pubs	26%	25%
Outdoor swimming/sunbathing – Mar-Nov	12%	14%	Museums/Historic sites	25%	33%
Nature observing	11%	17%	Visit local farms and/or local food producers	14%	22%
Whale watching	4%	7%	Visit a nature park or fossil/geology site	13%	20%
Outdoor sporting event	4%	5%	Live music performances	13%	14%
Sail/Boat tour (other than whale watching)	4%	4%	Art galleries/Fine art studios	10%	12%
Golfing (not mini-golf) – Mar-Nov	3%	5%	Casino	10%	9%
			Attend a festival/outdoor event/community fair	9%	12%

Travellers who visited the Bay of Fundy and Annapolis Valley were more likely than all visitors to the province to report participating in outdoor activities while in the province (48%, compared with 39% of all visitors to Nova Scotia). They were also more likely to have visited places and events, including craft shops/studios, museums/historic sites, local farms/food producers, and nature parks or fossil/geology sites.



Previous Trips to Nova Scotia

Just over eight in ten visitors who included the Bay of Fundy and Annapolis Valley in their trip indicated their visit to the province in 2010 was not their first, with three-quarters previously visiting in 2009 or 2010. (Table T12)

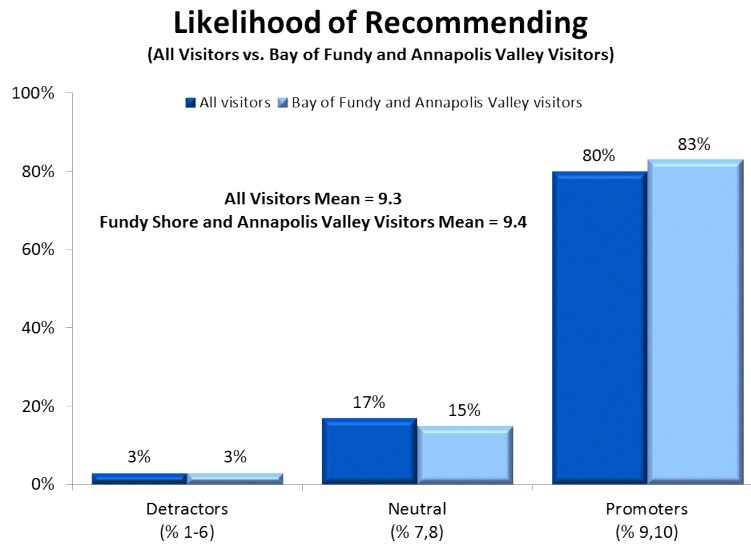


Compared with all visitors to the province, those who stopped in Bay of Fundy and Annapolis Valley were slightly more likely to be visiting for the first time.



Likelihood of Recommending

The vast majority of visitors to the Bay of Fundy and Annapolis Valley would recommend (rating 9 or 10 on 10-point scale) Nova Scotia to friends and family as a place to visit, with two-thirds indicating they would definitely recommend. Overseas visitors were least likely to indicate they would recommend visiting the province. Business travellers were less likely than pleasure travellers and those visiting friends or relatives to recommend Nova Scotia. (Table O1)

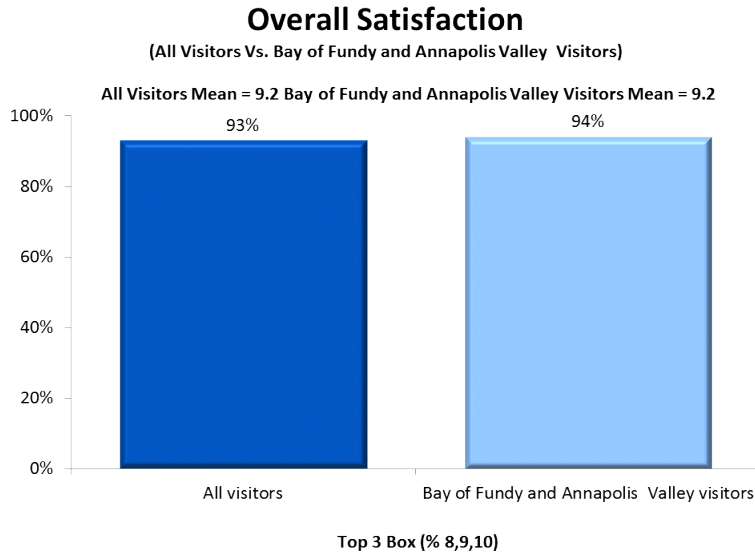


Visitors who included Bay of Fundy and Annapolis Valley in their trip were slightly more likely than all visitors to the province to indicate they would recommend visiting Nova Scotia to friends or relatives.



Overall Satisfaction

Overall satisfaction with visitors' trip to Nova Scotia was extremely high among those who included the Bay of Fundy and Annapolis Valley in their visit, with over nine in ten offering a rating of eight, nine, or ten on a 10-point scale. Satisfaction levels did not fluctuate across visitors to the Bay of Fundy and Annapolis Valley. (Table O2)



Satisfaction levels among visitors to the Bay of Fundy and Annapolis Valley were generally consistent compared with all visitors to the province.



Satisfaction with Aspects of Visit

Among those who visited the Bay of Fundy and Annapolis Valley, satisfaction ratings were high for most aspects of the visit. Areas that received lower satisfaction scores included local Nova Scotia wine and the mix of traditional and contemporary. (Table O4a-O4n)

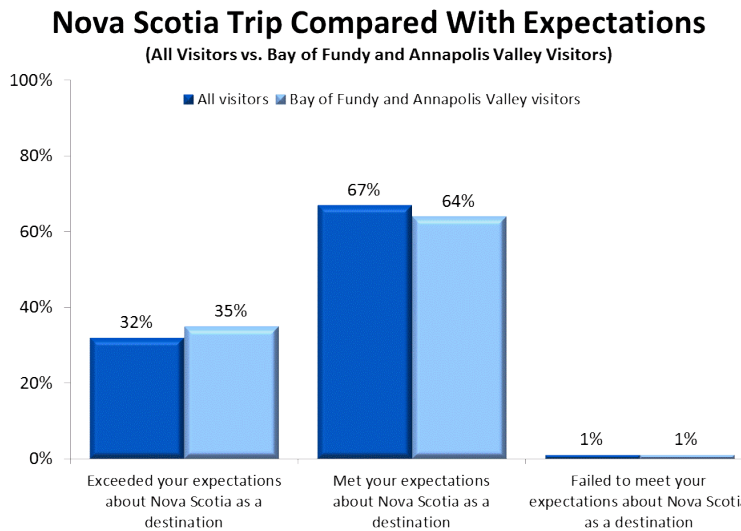
Satisfaction With Aspects of Trip to Nova Scotia (All Visitors vs. Bay of Fundy and Annapolis Valley Visitors)		
Aspects of Trip	All visitors	Bay of Fundy and Annapolis Valley visitors
The opportunity to visit friends and family	67%	69%
The seacoast	67%	72%
The natural landscape and wildlife	63%	70%
The culture and people	60%	64%
Weather	58%	61%
The chance to do interesting activities	57%	61%
The local Nova Scotian food	56%	61%
The opportunity to rejuvenate	56%	60%
Your interests and hobbies	53%	56%
Both city and country experiences within easy reach	52%	58%
Value for money	50%	52%
The heritage and history	48%	53%
The mix of traditional and contemporary	39%	42%
The local Nova Scotian wine	18%	21%

Compared with all visitors to the province, travellers visiting the Bay of Fundy and Annapolis Valley tended to offer higher satisfaction ratings for the various aspects of their visit.



Meeting Expectations

Close to two-thirds of visitors who included the Bay of Fundy and Annapolis Valley in their trip indicated their expectations for their visit to Nova Scotia were met, while just over one-third indicated their expectations were exceeded. Visitors originating from the Mid-Atlantic US were most likely to report their expectations were exceeded. Business travellers were less likely than pleasure travellers and those visiting friends or family to report their trip exceeded their expectations. (Table O5)

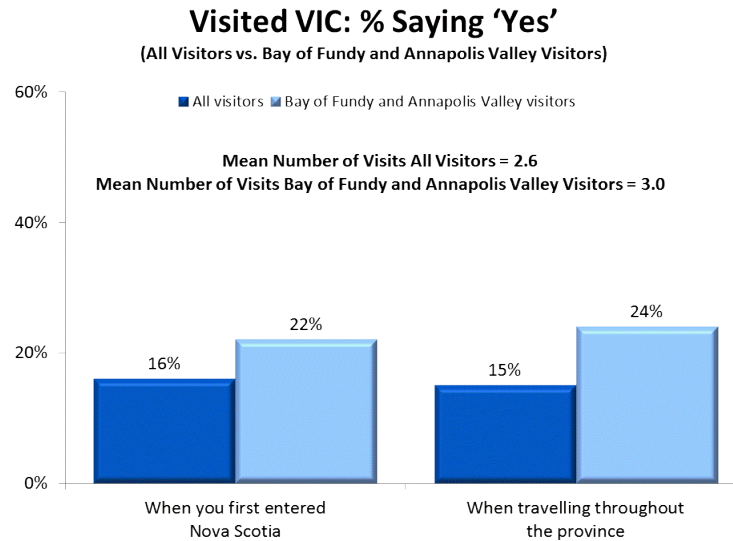


Travellers who visited the Bay of Fundy and Annapolis Valley were slightly more likely than all visitors the province to indicate their trip exceeded their expectations.



Visitor Information Centres/Tourist Bureaus

One-third of visitors who stopped in the Bay of Fundy and Annapolis Valley during their trip visited a Visitor Information Centre, either when they first entered or while travelling throughout the province. Those travelling from long-haul markets were more likely than local visitors to stop at a VIC. RV travellers and pleasure travellers were twice as likely as their counterparts to report visiting a VIC. Those visiting a VIC did so, on average, 3 times. Overseas visitors visited most frequently, on average, 4.6 times. (Tables T9 and T9ct)

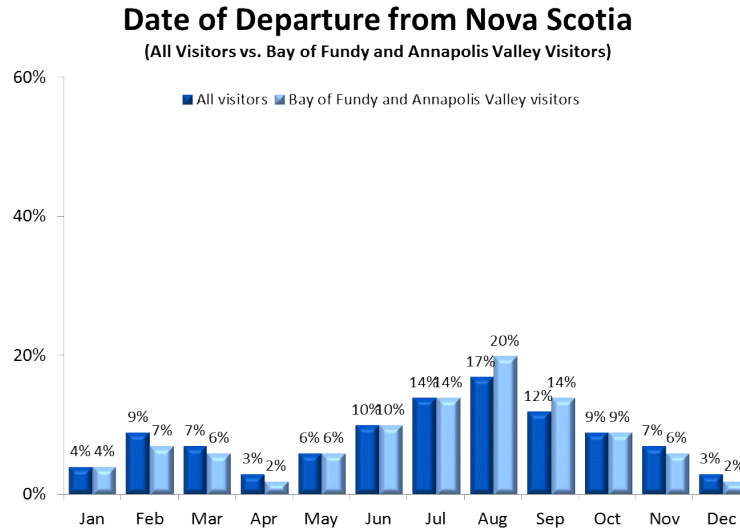


Bay of Fundy and Annapolis Valley visitors were more likely than all visitors to Nova Scotia to visit a VIC. Among those who visited a VIC, visitors to the Bay of Fundy and Annapolis Valley made more visits compared with all visitors to the province.



Time of Visit

Just under six in ten visitors to the Bay of Fundy and Annapolis Valley visited Nova Scotia between June and September. Business travellers and those from Atlantic Canada were less likely than others to have visited during this four-month period. (Table A7)



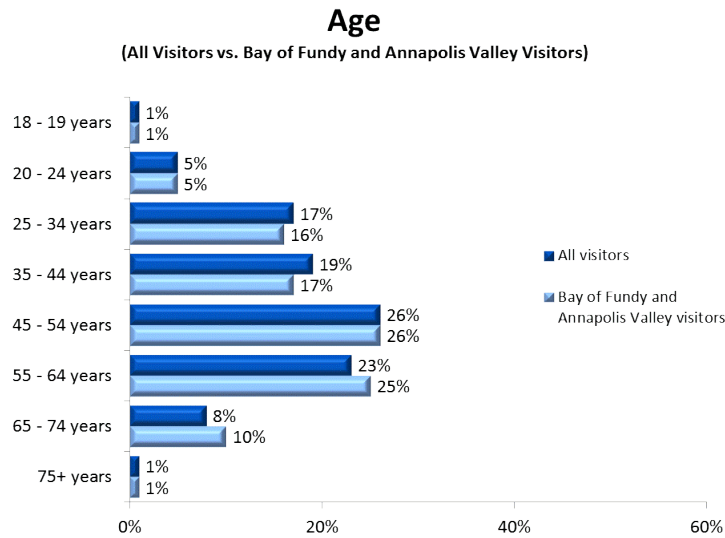
Visitors to the Bay of Fundy and Annapolis Valley were somewhat more likely than all visitors to Nova Scotia to have visited during the months of August and September.



Demographics

Age

Visitors aged 45 to 54 years and those aged 55 to 64 years each comprised one-quarter of all travellers who included Bay of Fundy and Annapolis Valley in their visit. Other age categories included 25 to 34 (16%) and 35 to 44 (17%). Eleven percent of visitors were over the age of 65, and six percent were under the age of 25. (Table V2)

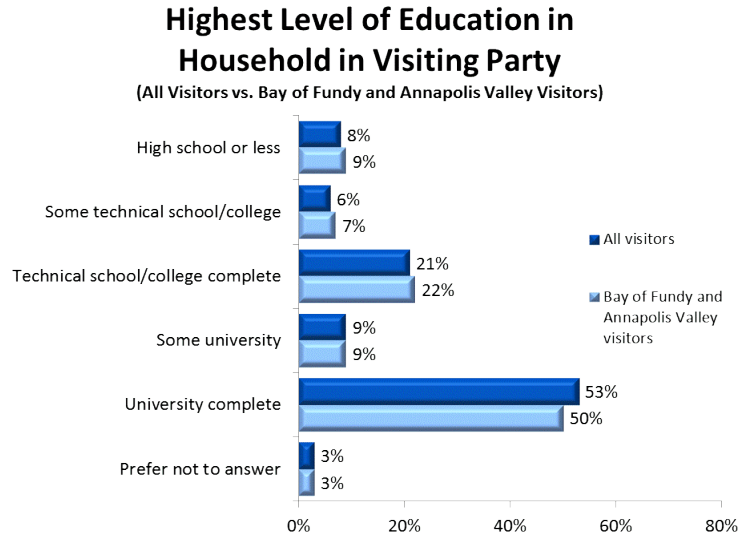


Results among Bay of Fundy and Annapolis Valley visitors were generally consistent compared with all visitors to the province.



Education

One-half of travellers who visited the Bay of Fundy and Annapolis Valley have completed a university education, and over two in ten have completed college. American visitors and air travellers were more likely than others to report completing university. (Table V4)

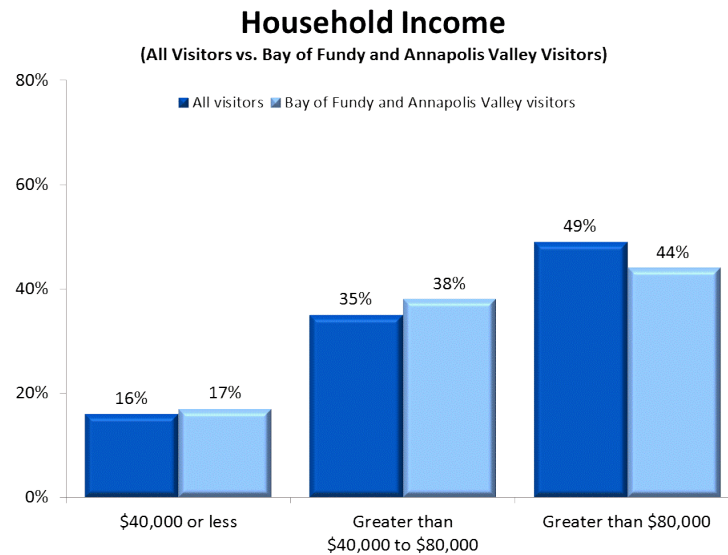


The education profile among visitors who included the Bay of Fundy and Annapolis Valley in their trip was generally consistent with that of all visitors to Nova Scotia.



Household Income

Over four in ten visitors to the Bay of Fundy and Annapolis Valley reported a household income of more than \$80K. Approximately four in ten reported household incomes of more than \$40K, up to \$80K, while the remaining close to two in ten were in the lowest income category of up to \$40K. Visitors originating from Ontario, the US, and overseas, as well as air travellers and those here for business purposes, reported higher household incomes compared with their counterparts. (Table V5/V6)

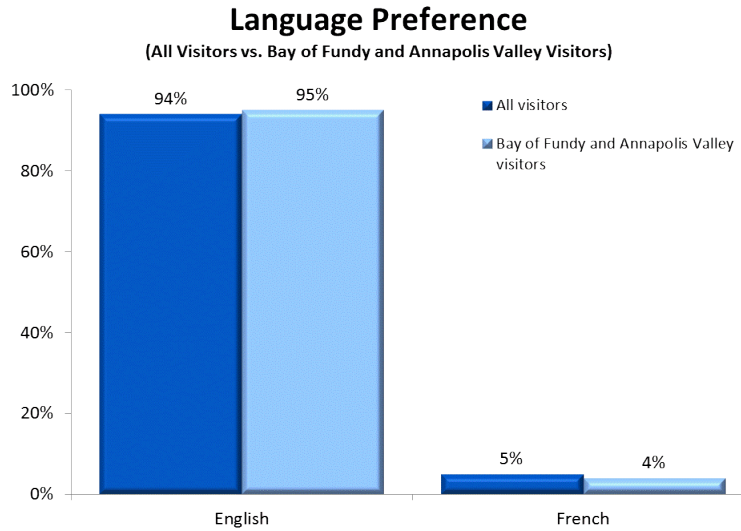


Visitors to the Bay of Fundy and Annapolis Valley reported slightly lower levels of household income compared with all visitors to the province.



Language Preference

English was the preferred language among nearly all visitors who stopped in the Bay of Fundy and Annapolis Valley. Quebecers were the only exception, with more than four in ten indicating they preferred French. (Table T11)



Results among those who stopped in the Bay of Fundy and Annapolis Valley were on par with all visitors to Nova Scotia.

