

Nova Scotia Visitor Exit Survey Community Report

Prepared for:

Nova Scotia Department of Economic and Rural Development and Tourism

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Introduction

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

- To develop key tourism statistics used to calculate industry activity, such as party size and average expenditures; and
- To provide trip and visitor profile information, such as trip purpose, activities participated in while visiting, and trip satisfaction.

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

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

Introduction (cont.)

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

This report is a companion document to the main VES report. The results reported here detail travel to various communities and tourism regions within the province.

For further information on this study, please contact:

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Community Analysis

Communities Visited

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 Analysis

Communities Visited – Cape Breton Island

COMMUNITY	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	19%	15%	16%	3.8	
Arichat	1%	1%	0%	3.2	4%
Baddeck	9%	5%	4%	2.4	48%
Big Pond	1%	1%	0%	4.2	7%
Cape Breton Highlands National Park	8%	7%	1%	2.2	39%
Cape North	3%	3%	1%	2.3	16%
Cheticamp	8%	5%	3%	1.9	39%
Fourchu	0%	0%	0%	1.0	2%
Glace Bay	2%	2%	0%	4.7	12%
Ingonish	6%	5%	2%	1.9	32%
Inverness	4%	3%	1%	3.5	20%
Iona	1%	1%	0%	5.2	5%
Louisbourg	5%	4%	1%	1.7	24%
Mabou	3%	2%	1%	2.4	15%
Margaree	3%	2%	1%	4.8	15%
New Waterford	1%	1%	0%	4.7	4%
North Sydney	6%	4%	2%	2.9	29%
Pleasant Bay	4%	4%	1%	2.3	21%
Point Michaud	0%	0%	0%	3.2	2%
Port Hastings	2%	2%	0%	1.4	13%
Port Hawkesbury	4%	3%	1%	3.4	23%
Port Morien	0%	0%	0%	2.6	2%
St. Peter's	2%	2%	0%	2.0	11%
Sydney	7%	4%	3%	2.3	36%
Whycocomagh	2%	2%	0%	3.0	11%

Community Analysis

Communities Visited – Eastern Shore

COMMUNITY	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%	4.4	
Canso	2%	1%	0%	2.3	29%
Guysborough	1%	1%	0%	12.9	21%
Isaacs Harbour	1%	0%	0%	5.0	9%
Liscomb	1%	0%	0%	2.5	12%
Middle Musquodoboit	1%	1%	0%	3.5	16%
Musquodoboit Harbour	2%	2%	0%	3.0	37%
Sheet Harbour	2%	1%	0%	2.5	24%
Sherbrooke	2%	1%	0%	1.3	24%

Community Analysis

Communities Visited – Fundy Shore and Annapolis Valley

COMMUNITY	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
Fundy Shore and Annapolis Valley	37%	30%	18%	3.5	
Advocate Harbour	1%	1%	0%	2.2	3%
Annapolis Royal	6%	4%	1%	2.4	15%
Berwick	3%	2%	0%	2.9	7%
Blomidon	2%	2%	0%	1.2	6%
Bridgetown	2%	2%	0%	3.5	6%
Brookfield	2%	1%	0%	3.1	4%
Digby	7%	5%	2%	2.5	18%
Five Islands	2%	1%	1%	3.1	5%
Grand Pre	3%	3%	1%	2.5	9%
Greenwood	1%	0%	1%	5.2	3%
Hantsport	2%	1%	0%	2.5	4%
Joggins	1%	1%	0%	1.0	3%
Kejimikujik National Park	1%	1%	0%	1.8	4%
Kentville	6%	5%	2%	3.5	17%
Middleton	3%	2%	1%	4.0	8%
Noel	1%	1%	0%	3.1	2%
Parrsboro	2%	2%	0%	2.4	5%
Port Royal	2%	2%	0%	3.0	5%
South Rawdon	0%	0%	0%	3.5	1%
Springhill	2%	2%	0%	6.8	5%
Stewiacke	3%	3%	0%	5.1	8%
Truro	21%	15%	7%	2.3	56%
Walton	1%	1%	0%	6.5	2%
Westport	1%	1%	0%	2.9	2%
Weymouth	1%	1%	0%	5.4	3%
Windsor	5%	4%	1%	2.4	14%
Wolfville	8%	6%	2%	3.8	21%

Community Analysis

Communities Visited – Halifax Regional Municipality

COMMUNITY	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 Regional Municipality	79%	43%	69%	3.2	
Bedford	18%	13%	5%	3.7	22%
Dartmouth	34%	21%	15%	3.2	44%
Eastern Passage	1%	0%	0%	3.0	1%
Elmsdale	2%	0%	1%	3.3	2%
Halifax	68%	26%	47%	2.9	87%
Mount Uniacke	2%	1%	1%	3.2	2%
Sackville	10%	7%	3%	3.5	12%

Community Analysis

Communities Visited – Northumberland Shore

COMMUNITY	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	29%	24%	11%	3.2	
Amherst	11%	10%	2%	1.5	39%
Antigonish	11%	8%	3%	3.1	38%
Cape George	1%	1%	0%	5.3	4%
Caribou	4%	4%	0%	2.0	14%
New Glasgow	9%	6%	3%	2.9	32%
Oxford	2%	2%	0%	3.3	7%
Pictou	7%	5%	2%	3.3	25%
Pugwash	2%	2%	0%	3.2	6%
Tatamagouche	2%	2%	0%	4.9	8%
Tidnish	1%	0%	0%	2.8	2%

Community Analysis

Communities Visited – South Shore

COMMUNITY	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	27%	24%	11%	4.6	
Barrington	0%	0%	0%	5.6	1%
Bridgewater	7%	5%	2%	6.3	24%
Caledonia	1%	0%	0%	6.3	2%
Chester	7%	6%	1%	3.8	24%
Hubbards	1%	0%	1%	4.2	4%
Kejimkujik Seaside Adjunct	1%	1%	0%	2.9	4%
LaHave	2%	2%	0%	6.6	9%
Liverpool	3%	2%	1%	4.0	13%
Lunenburg	13%	11%	3%	2.3	49%
Mahone Bay	11%	10%	1%	2.8	42%
New Germany	1%	1%	0%	7.0	3%
New Ross	0%	0%	0%	5.5	2%
Peggy's Cove	16%	15%	1%	3.6	60%
Shelburne	2%	2%	1%	5.2	8%

Community Analysis

Communities Visited – Yarmouth and Acadian Shores

COMMUNITY	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%	4%	3%	3.7	
Church Point	2%	1%	0%	6.9	36%
Pubnico	1%	1%	0%	5.8	22%
Yarmouth	4%	2%	2%	2.7	82%

Community Analysis

Same-day Trips

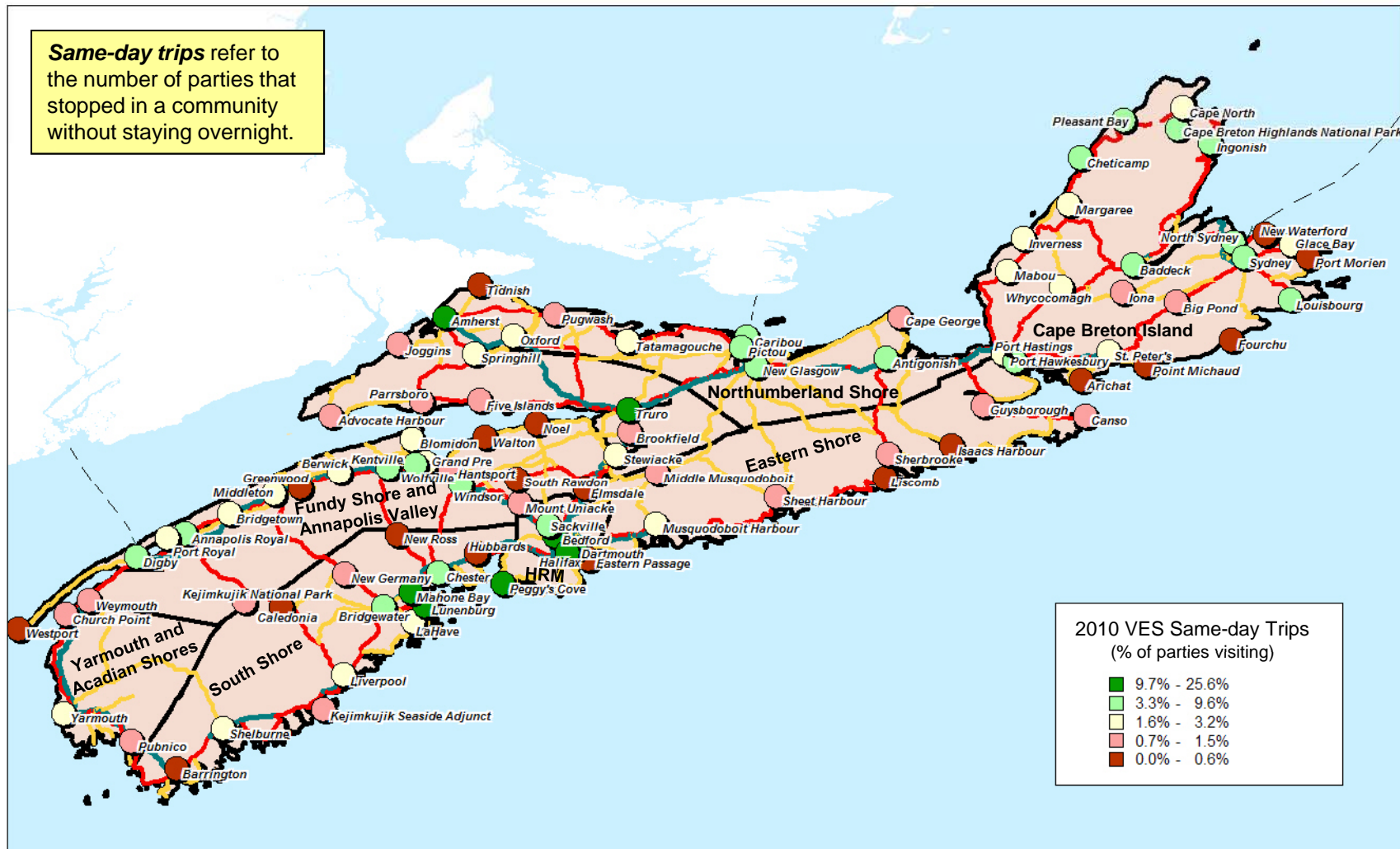
This section details same-day trips, or the number of parties that stopped for at least 30 minutes in a community but did not stay overnight. Same-day trips involve either a day trip to a destination community or a stopping point made while travelling to a day trip destination.

The following map reveals several areas throughout the province that had relatively high rates of same-day trips. The largest proportion of visits in the province occurred in and around the Halifax Regional Municipality, especially Halifax, Dartmouth and Peggy's Cove. Consistent with previous years, Peggy's Cove was a large draw, but is off the highway and has relatively few places to stay nearby, so it is not surprising this area has a high proportion of same-day trips. Indeed, the ratio of same-day trips to overnight trips in Peggy's Cove is the highest in the province, and stands in contrast to Halifax where they tend to be more overnight trips than same-day trips.

Other hot spots for same-day trips included the South Shore areas between Chester and Bridgewater, the communities along the Cabot Trail, the Digby/Annapolis Royal area, the Kentville/Wolfville area, the Amherst area, and the section of Highway 104 between Truro and Antigonish. This latter area was likely high in same-day trips owing to its location between Cape Breton and Halifax.

Community Analysis

Same-day Trips



Community Analysis

Overnight Trips

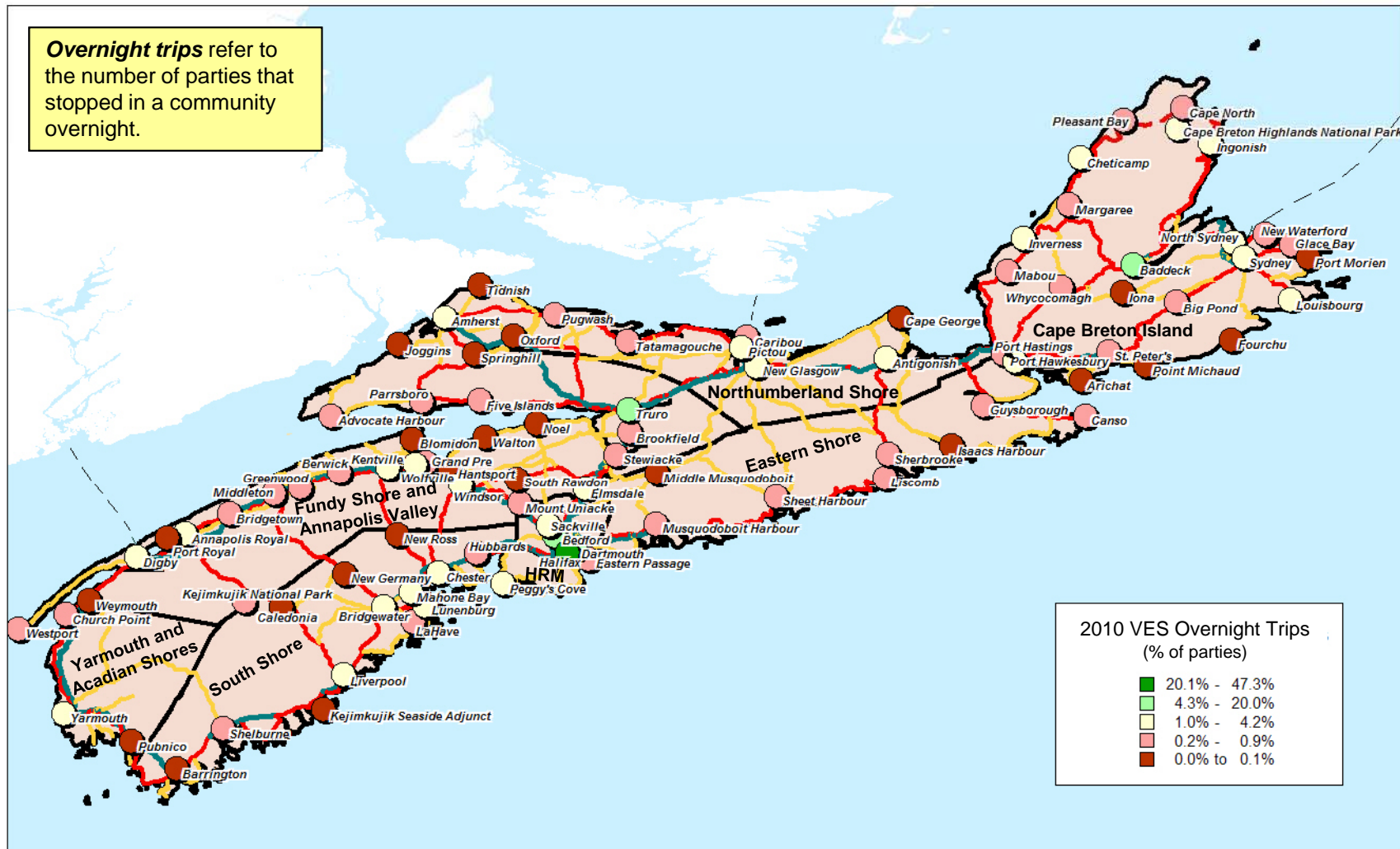
The below map illustrates the proportion of parties that stayed overnight in a particular community. Overnight trips are strongly related to the accommodations available at a particular location.

The map indicates the largest number of parties stayed overnight in the Halifax area. Over two-thirds of all parties stayed overnight in the Halifax Regional Municipality, with Halifax being the biggest draw. These results are consistent with previous research. Other popular overnight locations included the Truro to Antigonish corridor along Highway 104, the Cabot Trail (especially around Baddeck), the Sydney area, and the South Shore area around Lunenburg and Bridgewater, the Digby area and the Yarmouth area.

Community Analysis

Overnight Trips

Overnight trips refer to the number of parties that stopped in a community overnight.



Community Analysis

Total Trips

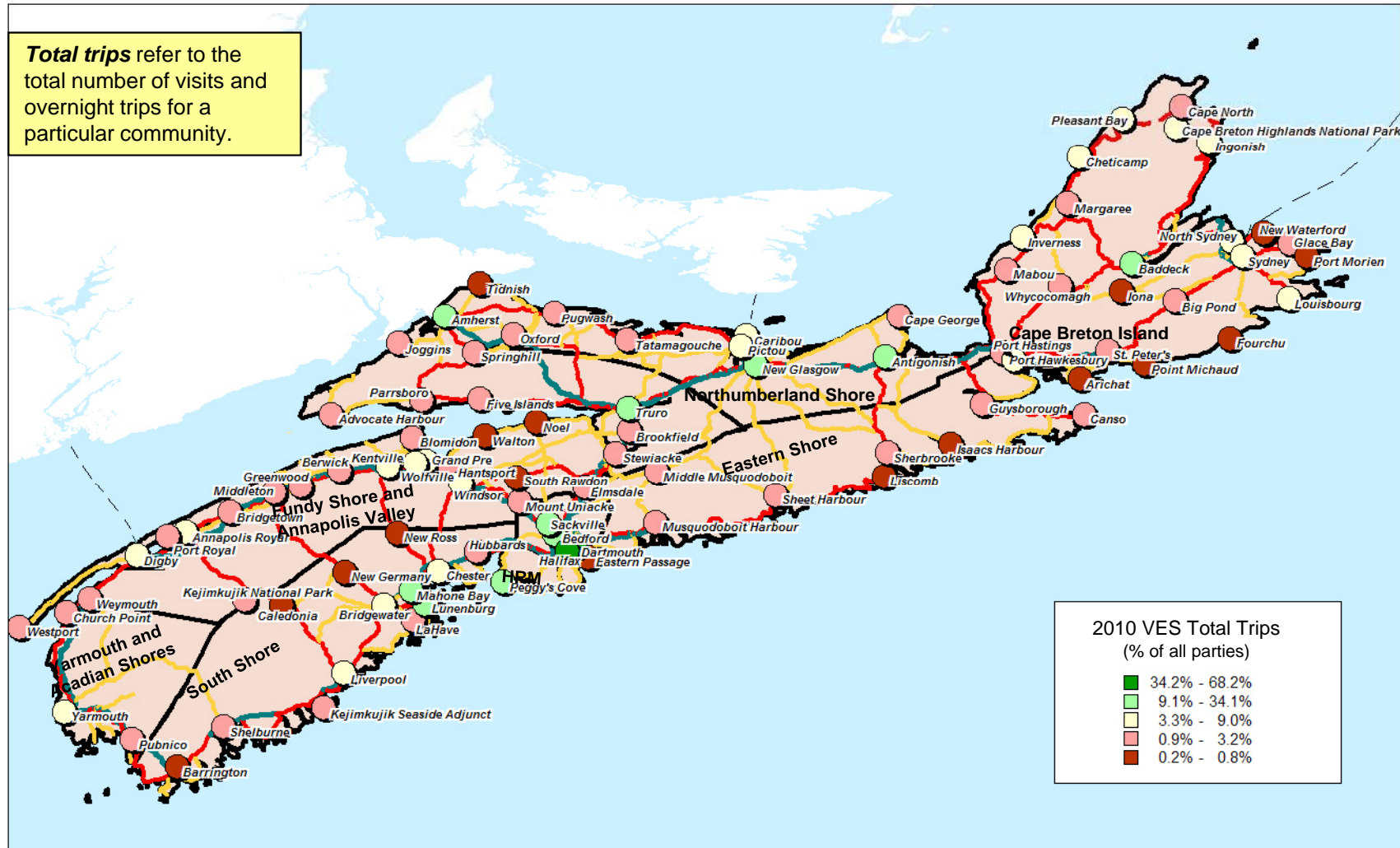
Total trips reflect the total number of parties that visited or stayed overnight in a particular community. The map below indicates total visitor traffic to a particular community (who stopped for any reason) and combines the information from the two previous maps.

The map reveals that most of the non-resident visitor traffic in Nova Scotia travels to the Halifax area, through the 104 corridor between Truro and Antigonish, the Cabot trail area, and the South Shore region around Bridgewater, Lunenburg and Mahone Bay. By contrast, the Eastern Shore beyond Sheet Harbour, the southern regions of Cape Breton from Arichat to Fourchu, and the southern area of the province near Barrington ranked lower in terms of total trips.

Community Analysis

Total Trips

Total trips refer to the total number of visits and overnight trips for a particular community.



Community Analysis

Capture Rate

Capture rate reflects the percentage of parties that stopped in a community, whether for a short period or overnight, out of the total number of parties who visited the region (i.e., total trips for the region).

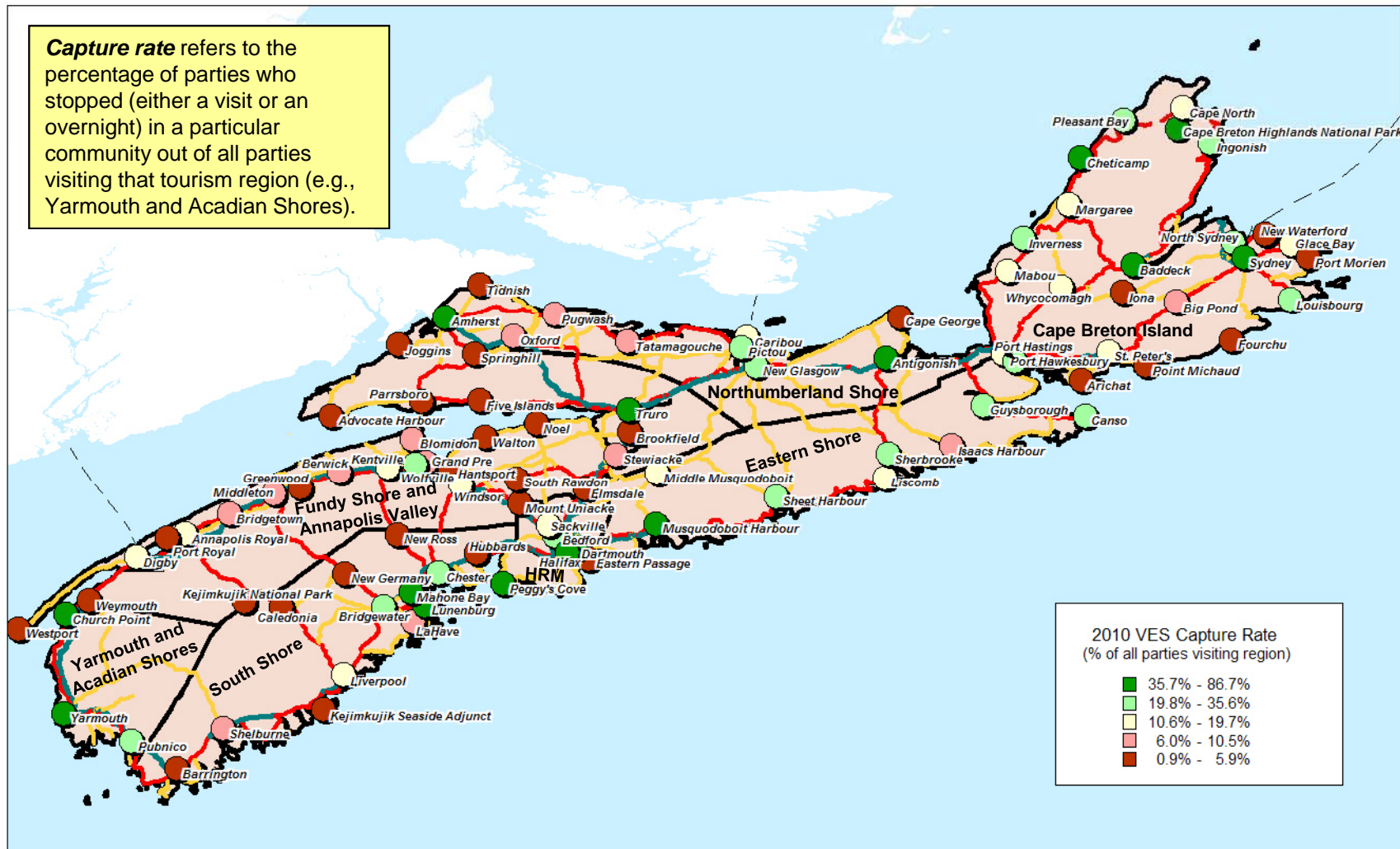
Consistent with previous research, capture rate tends to be higher for areas representing endpoints or destinations along a travel route. In particular, Halifax, Yarmouth, Truro, Peggy's Cove, Lunenburg, Baddeck, Mahone Bay and Dartmouth had the highest capture rates. Other areas with relatively high capture rates included the Cabot Trail communities (especially Cape Breton Highlands National Park, Cheticamp and Ingonish), Amherst, Antigonish, and Musquodoboit Harbour.

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 Analysis

Capture Rate

Capture rate refers to the percentage of parties who stopped (either a visit or an overnight) in a particular community out of all parties visiting that tourism region (e.g., Yarmouth and Acadian Shores).



Survey Methodology

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

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

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

Survey Methodology (cont.)

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

Factor	Completed Interviews (#)	Completed Interviews (%)
Mode of Travel		
Automobile	4,646	73%
RV	154	2%
Airplane	1,600	25%
Exit Point		
Amherst	4,019	63%
Pictou	482	8%
North Sydney	116	2%
Digby	183	3%
Halifax Int. Airport	1,600	25%

Factor	Completed Interviews (#)	Completed Interviews (%)
Market Region		
Atlantic Canada	2,608	41%
Quebec	361	6%
Ontario	1,722	27%
Western Canada	424	7%
New England	447	7%
Mid-Atlantic	202	3%
Other US	517	8%
Overseas	119	2%
Survey Type		
Phone	420	7%
Internet	5,980	93%