COMMUNITY REPORT

2017 VISITOR EXIT SURVEY

TOURISM
NOVA SCOTIA

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INTRODUCTION

This report presents the results of the community visitation section of the 2017 Nova Scotia Visitor Exit Survey (VES).

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.

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 as well as the capture rate for the tourism regions. Capture rate identifies where visitors go within a particular region, using those who visited the region as a base.

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 vitiation rates across the geographic regions.

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TOURISM
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VISITATION BY REGION

NOVA SCOTIA TOURISM REGIONS

VISITATION BY REGION
Overall Visitors

% who stopped for at least 30 minutes, but not overnight
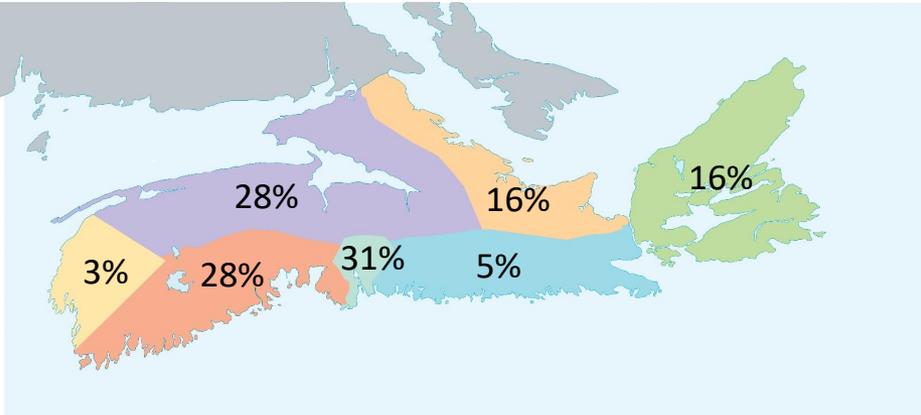
% spending at least one night

% who stopped for at least 30 minutes, or overnight

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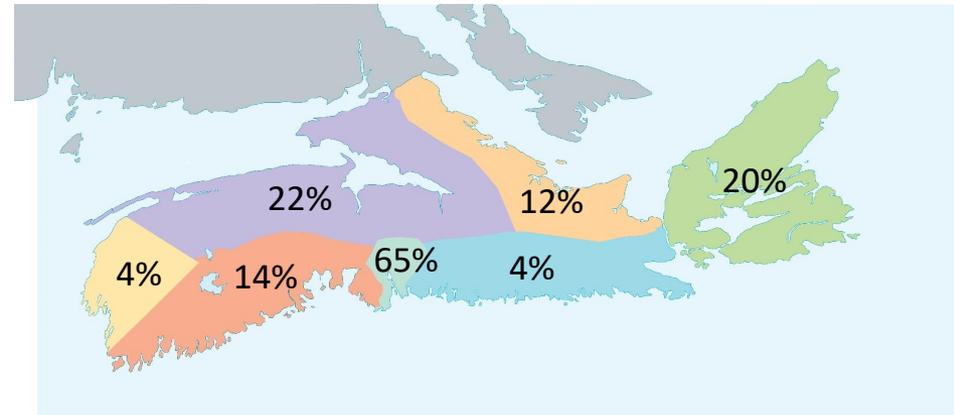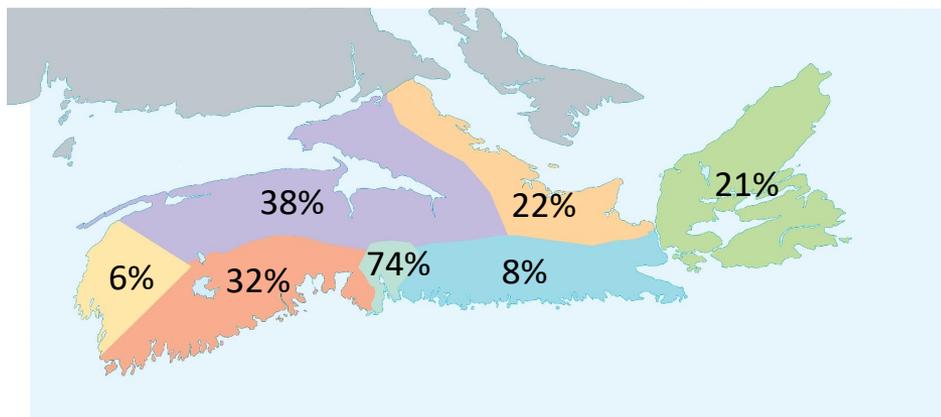
VISITATION BY REGION

Pleasure Visitors

% who stopped for at least 30 minutes, but not overnight
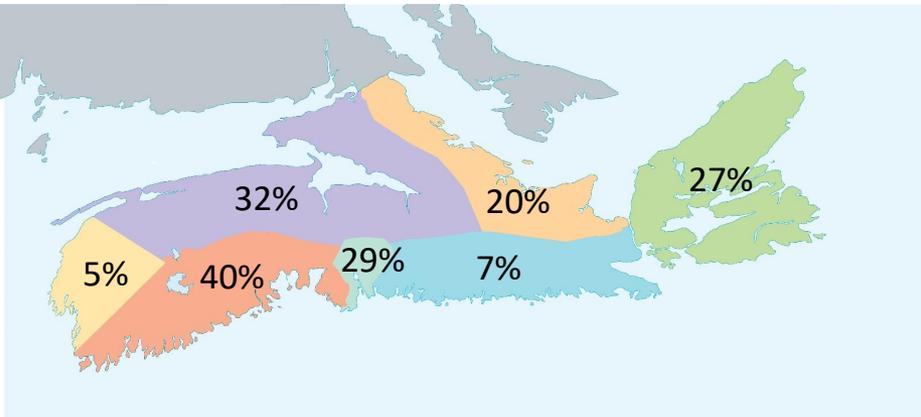
% spending at least one night

% who stopped for at least 30 minutes, or overnight

TOURISM NOVA SCOTIA
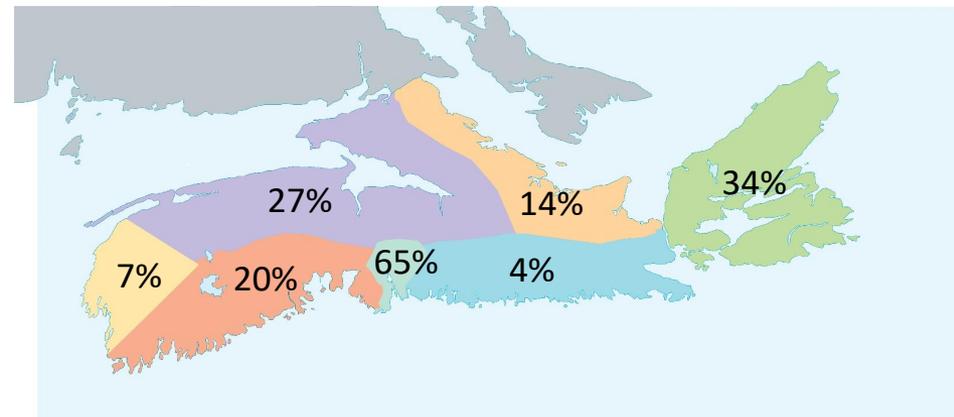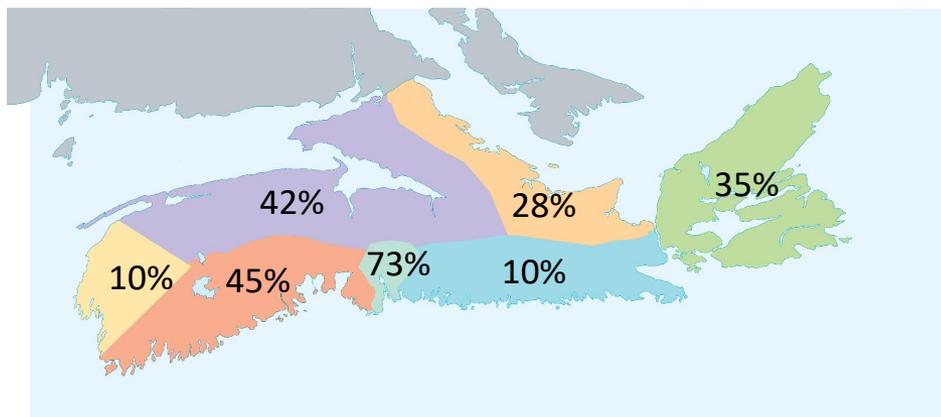
VISITATION BY REGION
VFR Visitors*

% who stopped for at least 30 minutes, but not overnight
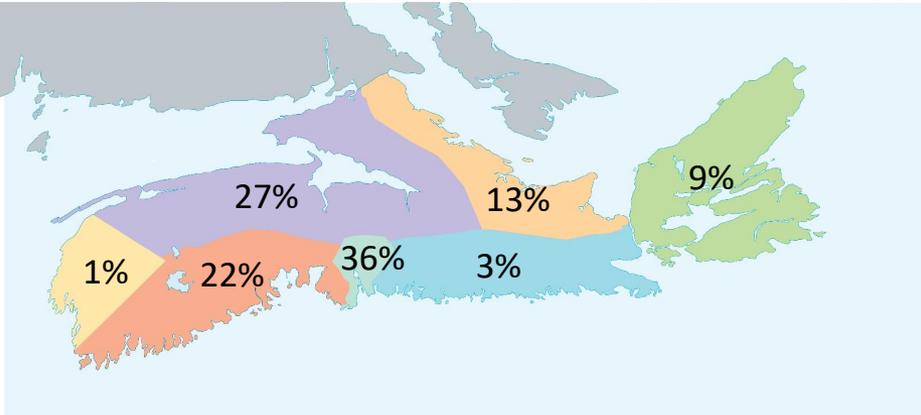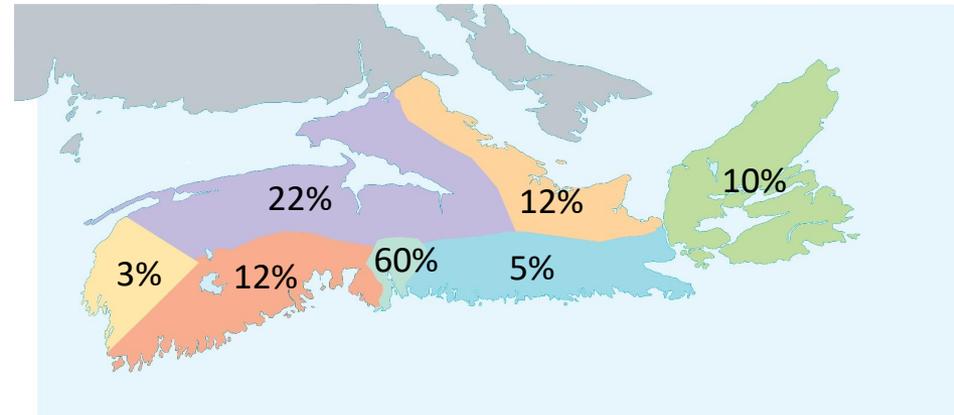
% spending at least one night

% who stopped for at least 30 minutes, or overnight

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* Visiting friends or relatives

CAPTURE RATE

TOURISM
NOVA SCOTIA
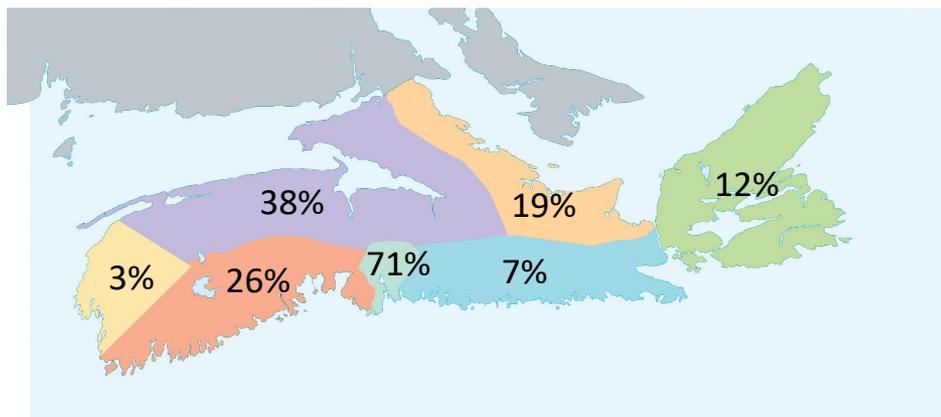
BAY OF FUNDY & ANNAPOLIS VALLEY - CAPTURE RATE*

| Location	Capture Rate
Truro	42%
Wolfville	23%
Digby	18%
Grand Pré	12%
Annapolis Royal	12%
Kentville	10%
Masstown	8%
Windsor	8%
Blomidon	6%
Stewiacke	5%
Port Royal	5%
Berwick	5%

Overall % who stopped for at least 30 minutes, or overnight

38%
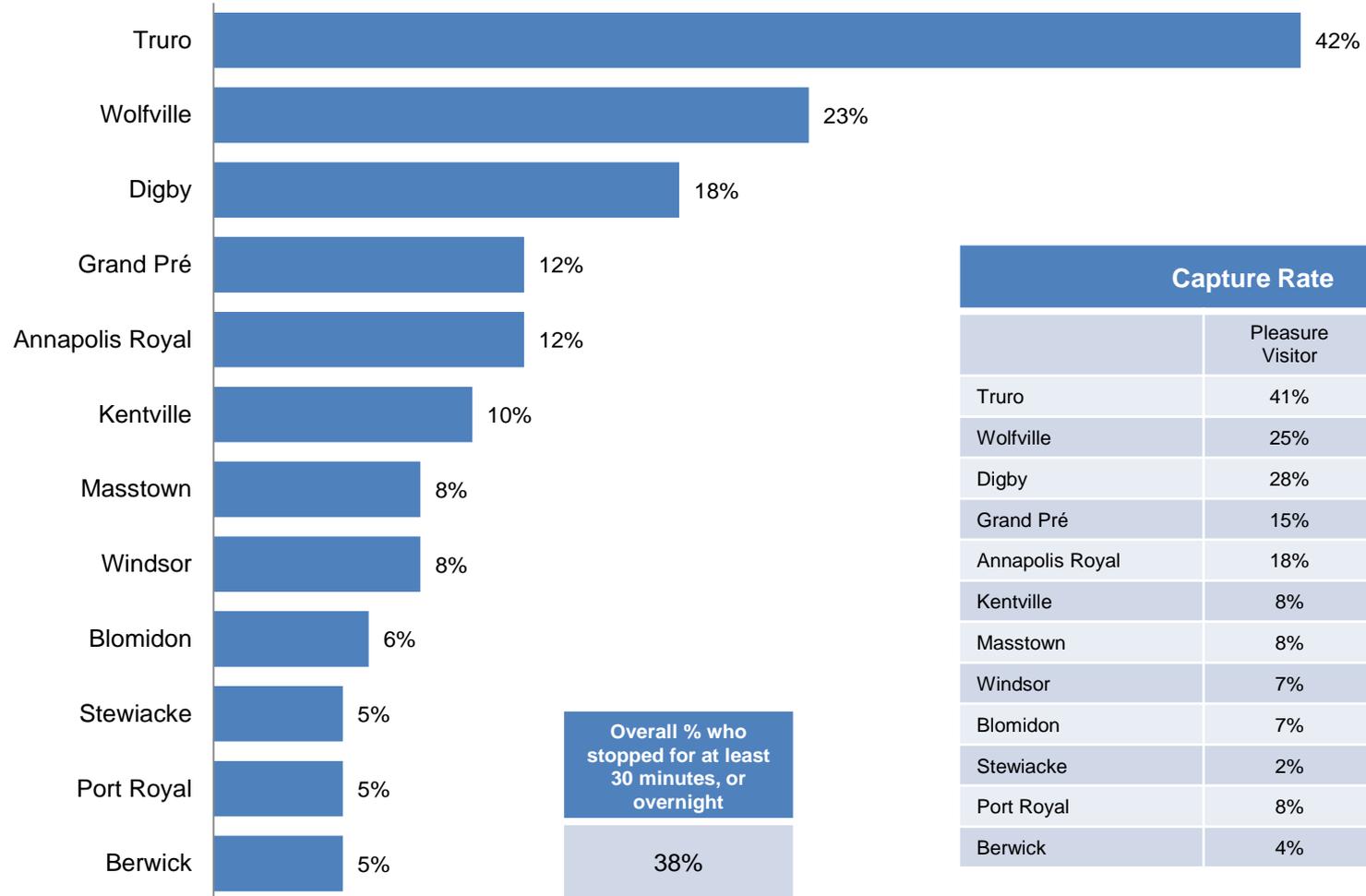
Capture Rate	Pleasure Visitor	VFR** Visitor
Truro	41%	42%
Wolfville	25%	24%
Digby	28%	8%
Grand Pré	15%	10%
Annapolis Royal	18%	6%
Kentville	8%	14%
Masstown	8%	6%
Windsor	7%	9%
Blomidon	7%	6%
Stewiacke	2%	6%
Port Royal	8%	2%
Berwick	4%	8%

TOURISM NOVA SCOTIA

* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the Bay of Fundy & Annapolis Valley 42% visited Truro.

** Visiting friends or relatives

SOUTH SHORE - CAPTURE RATE*

Peggy's Cove	62%
Lunenburg	55%
Mahone Bay	35%
Bridgewater	17%
Chester	16%
Liverpool	10%
LaHave	7%
Shelburne	6%
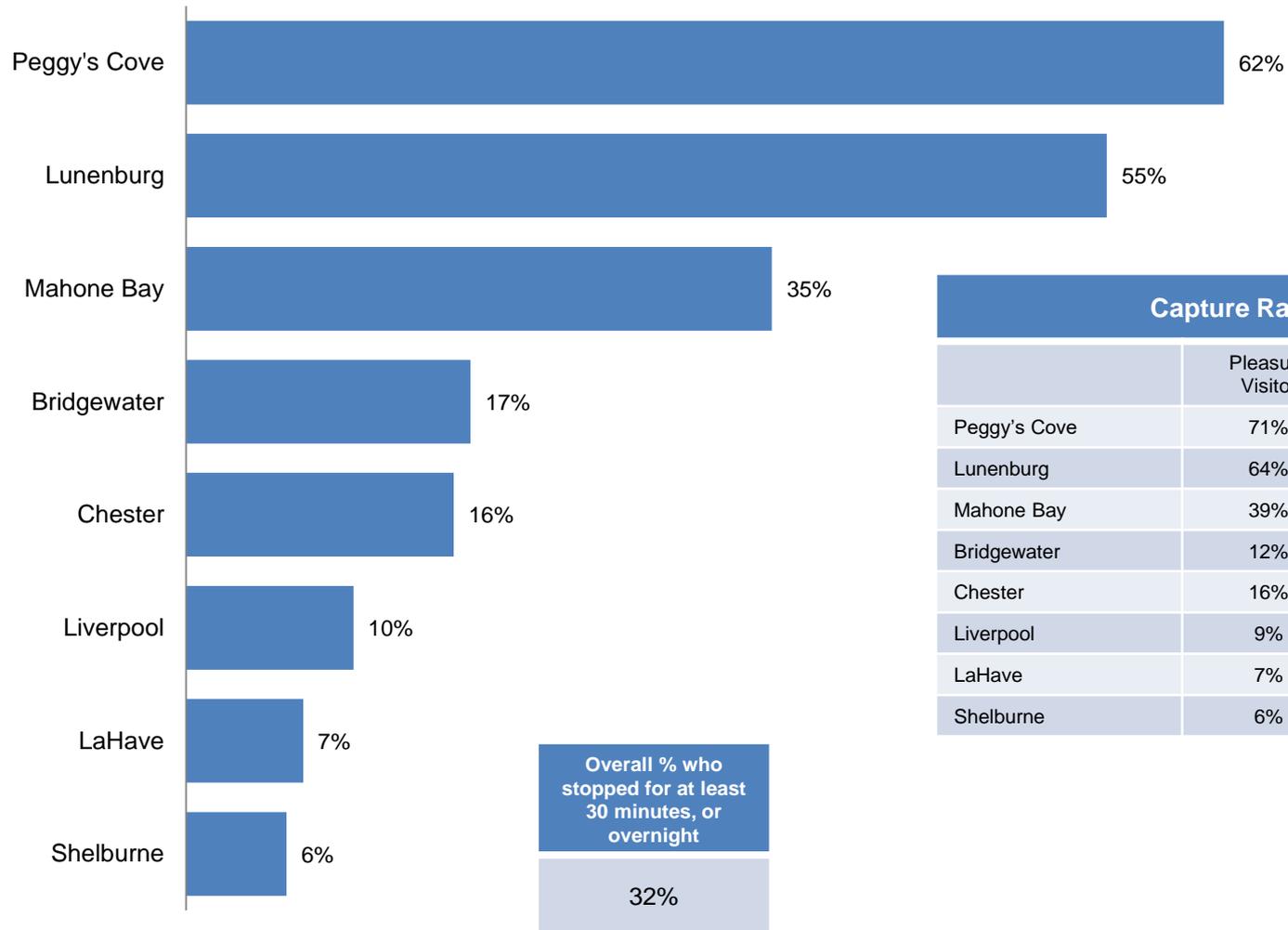
Capture Rate		
	Pleasure Visitor	VFR** Visitor
Peggy's Cove	71%	46%
Lunenburg	64%	40%
Mahone Bay	39%	30%
Bridgewater	12%	27%
Chester	16%	17%
Liverpool	9%	11%
LaHave	7%	10%
Shelburne	6%	5%

Overall % who stopped for at least 30 minutes, or overnight

32%

TOURISM NOVA SCOTIA

* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the South Shore 62% visited Peggy's Cove.

** Visiting friends or relatives

HALIFAX REGION - CAPTURE RATE*
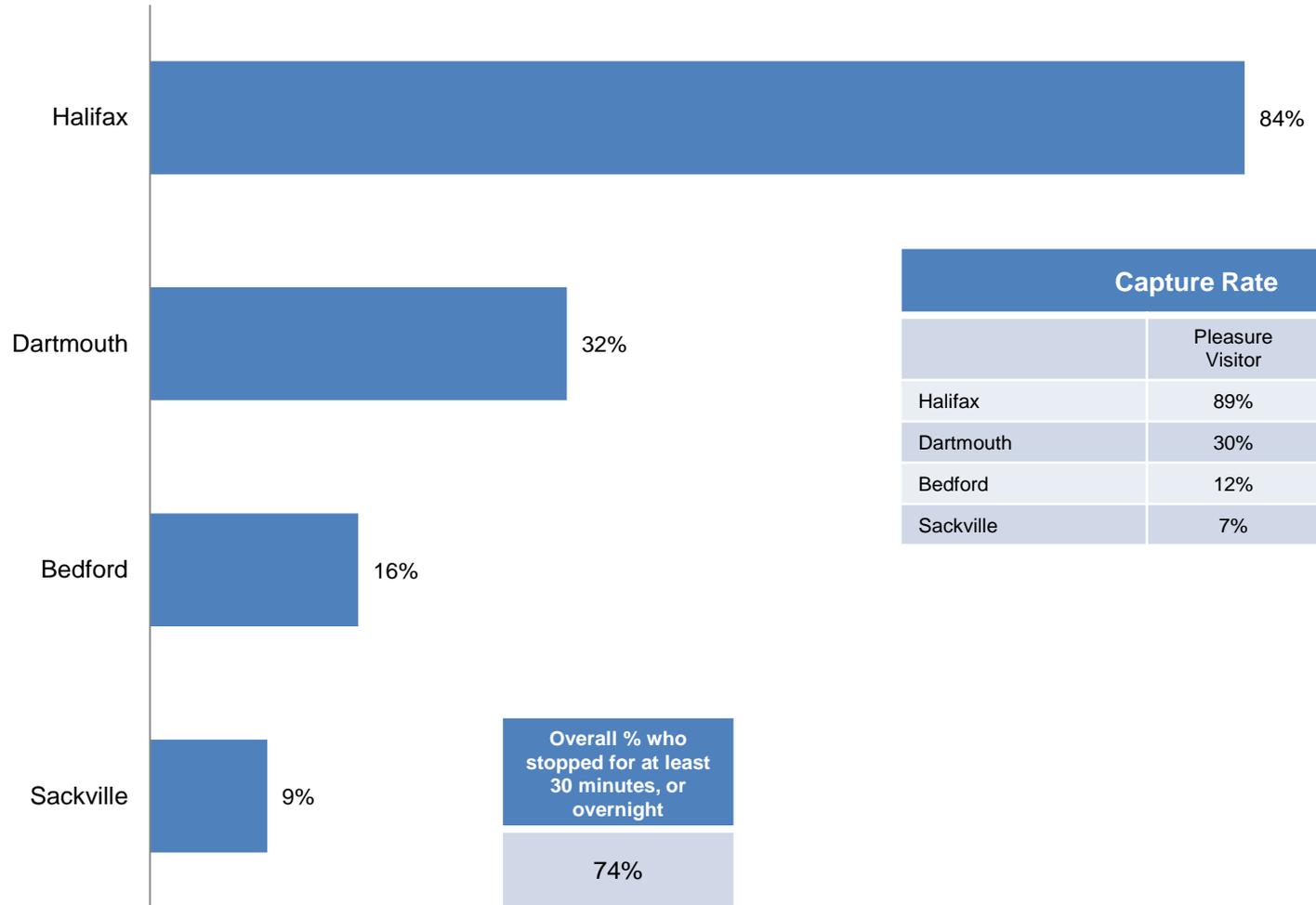
Halifax **84%**

Dartmouth **32%**

Bedford **16%**

Sackville **9%**

Capture Rate		
	Pleasure Visitor	VFR** Visitor
Halifax	89%	77%
Dartmouth	30%	35%
Bedford	12%	22%
Sackville	7%	13%

Overall % who stopped for at least 30 minutes, or overnight

74%

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* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the Halifax Region 32% visited Dartmouth.

** Visiting friends or relatives

EASTERN SHORE- CAPTURE RATE*
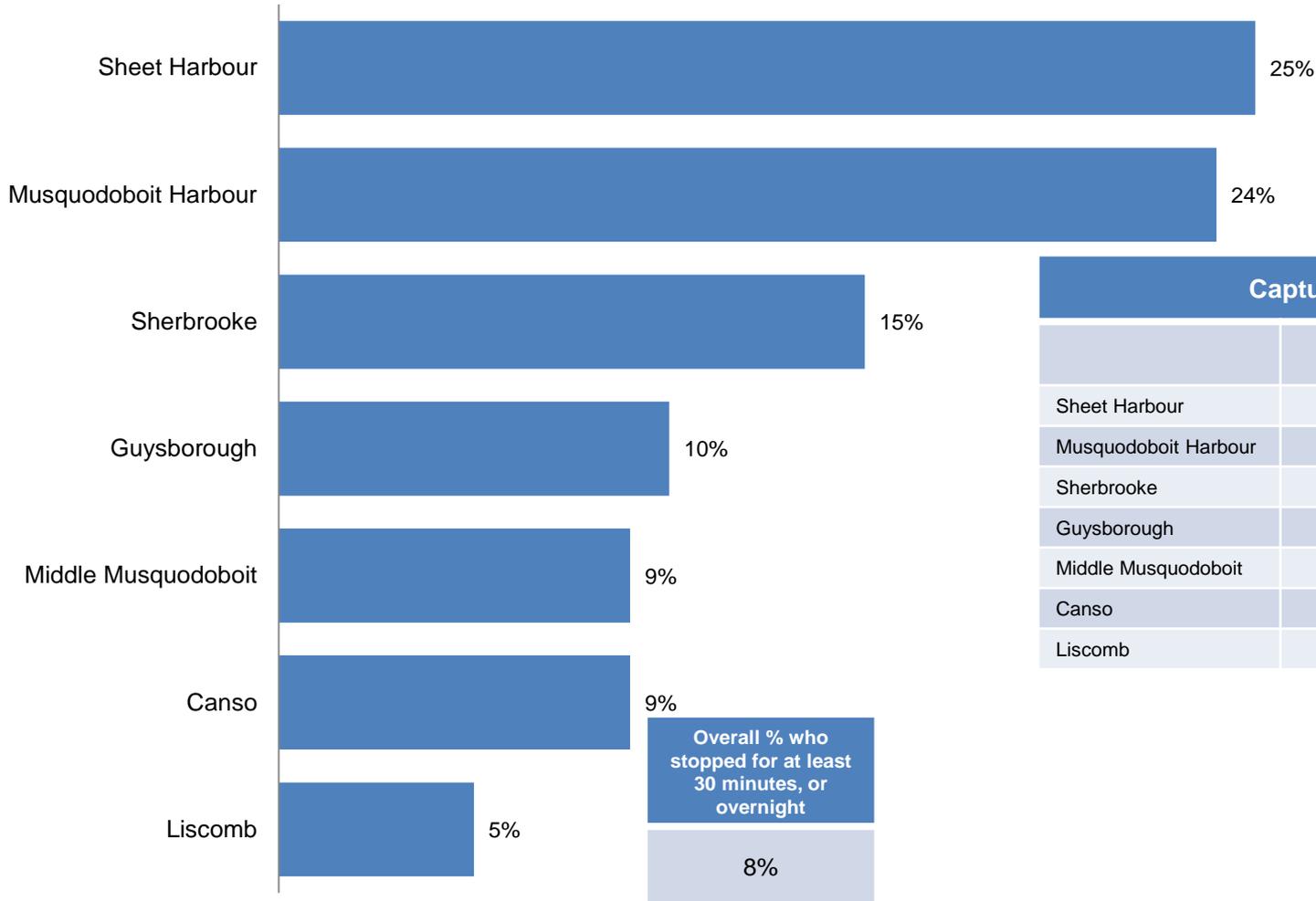
	Capture Rate	
	Pleasure Visitor	VFR** Visitor
Sheet Harbour	23%	31%
Musquodoboit Harbour	24%	21%
Sherbrooke	23%	4%
Guysborough	11%	10%
Middle Musquodoboit	9%	8%
Canso	14%	3%
Liscomb	8%	1%

Sheet Harbour — 25%

Musquodoboit Harbour — 24%

Sherbrooke — 15%

Guysborough — 10%

Middle Musquodoboit — 9%

Canso — 9%

Liscomb — 5%

Overall % who stopped for at least 30 minutes, or overnight

8%

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* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the Eastern Shore 25% visited Sheet Harbour.

** Visiting friends or relatives

NORTHUMBERLAND SHORE-CAPTURE RATE*

	Antigonish	36%
	Amherst	30%
	New Glasgow	27%
	Pictou	24%
	Tatamagouche	10%
	Caribou	10%
	Pugwash	6%
	Oxford	5%
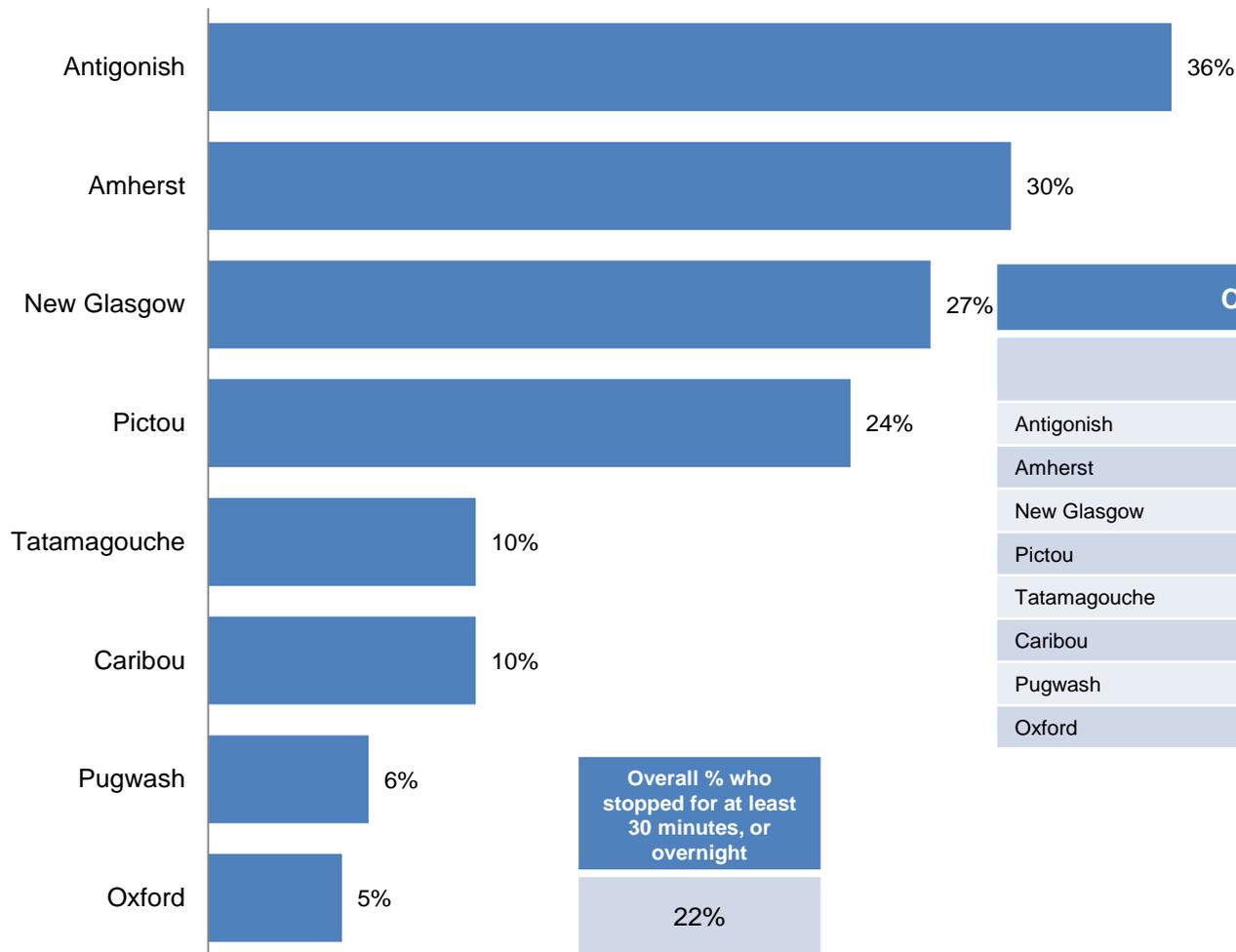
Capture Rate		
	Pleasure Visitor	VFR** Visitor
Antigonish	38%	35%
Amherst	26%	31%
New Glasgow	25%	32%
Pictou	26%	22%
Tatamagouche	12%	8%
Caribou	15%	3%
Pugwash	6%	7%
Oxford	3%	5%

**Overall % who stopped for at least 30 minutes, or overnight**

22%

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* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the Northumberland Shore 36% visited Antigonish.

** Visiting friends or relatives

CAPE BRETON ISLAND - CAPTURE RATE*

Location	Capture Rate
Baddeck	40%
Chéticamp	34%
Sydney	33%
Ingonish	33%
Louisbourg	27%
Cape Breton Highlands National Park	26%
North Sydney	19%
Pleasant Bay	16%
Inverness	13%
Cape North	13%
Port Hawkesbury	12%
Margaree	12%
Mabou	11%
Port Hastings	8%
Glace Bay	8%
St. Peter's	7%
Whycocomagh	6%

Overall % who stopped for at least 30 minutes, or overnight

21%
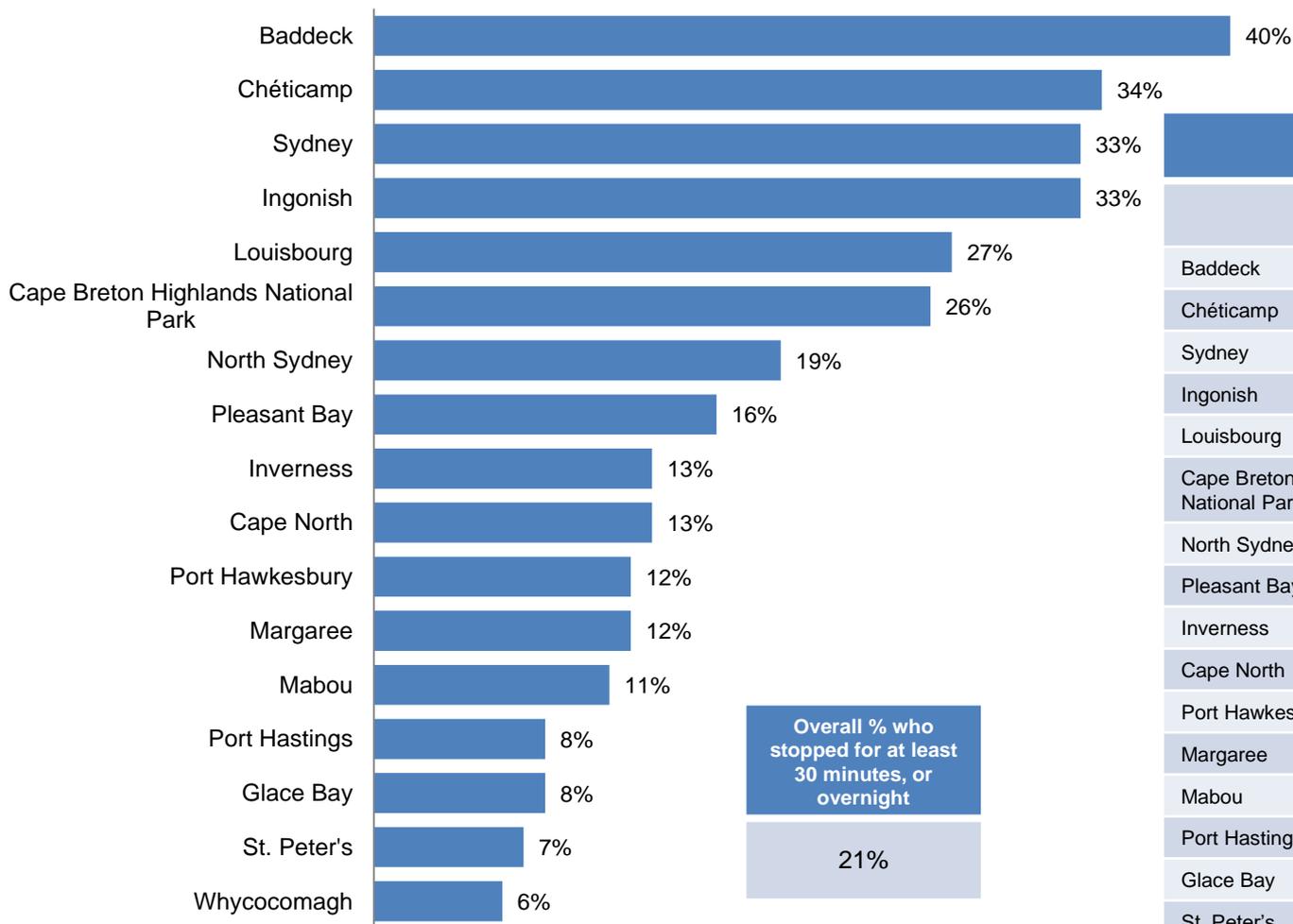
| Capture Rate		
	Pleasure Visitor	VFR** Visitor
Baddeck	43%	36%
Chéticamp	41%	18%
Sydney	31%	30%
Ingonish	39%	17%
Louisbourg	30%	14%
Cape Breton Highlands National Park	33%	9%
North Sydney	16%	28%
Pleasant Bay	19%	8%
Inverness	15%	9%
Cape North	15%	6%
Port Hawkesbury	11%	13%
Margaree	13%	9%
Mabou	12%	9%
Port Hastings	7%	11%
Glace Bay	8%	10%
St. Peter's	5%	10%
Whycocomagh	6%	7%

* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited Cape Breton Island 40% visited Baddeck.

** Visiting friends or relatives   - Page 14 -

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YARMOUTH & ACADIAN SHORES - CAPTURE RATE*

Region		
Yarmouth		88%
Pubnico	12%	
Church Point	12%	
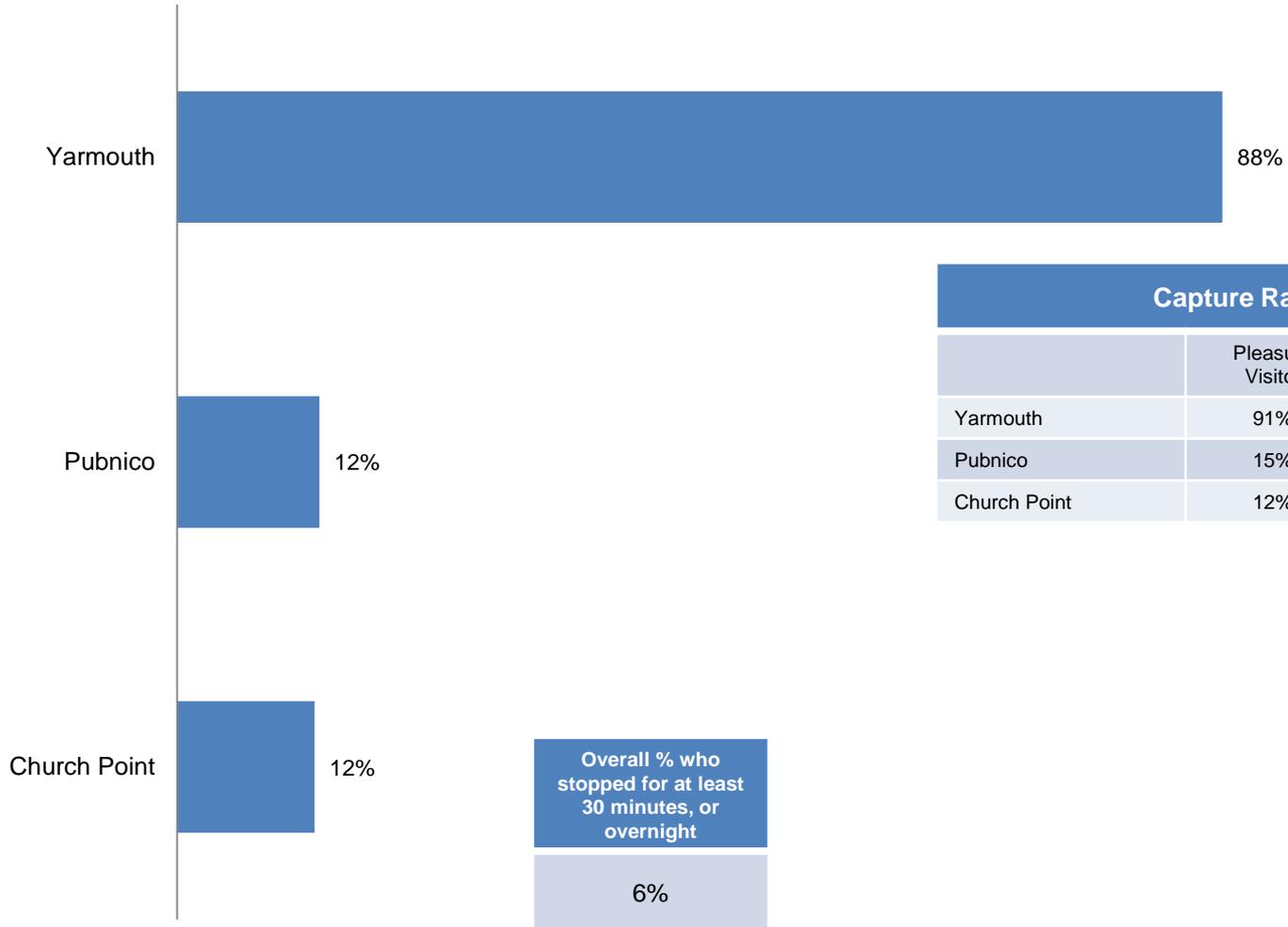
Capture Rate		
	Pleasure Visitor	VFR** Visitor
Yarmouth	91%	75%
Pubnico	15%	4%
Church Point	12%	13%

**Overall % who stopped for at least 30 minutes, or overnight**

6%

* Capture rate identifies where visitors go within a particular region, using those who visited the region as a base. For example, among all visitor parties who visited the Yarmouth & Acadian Shores 88% visited Yarmouth.

** Visiting friends or relatives

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DETAILED VISITATION

COMMUNITY VISITATION

Tourism Regions
% Visitor Parties

Bar chart showing % Visitor Parties across Tourism Regions for years 2010, 2015, 2017:

Region	2010	2015	2017
Bay of Fundy and Annapolis Valley	37%	38%	38%
South Shore	27%	29%	32%
Halifax Region	79%	74%	74%
Eastern Shore	7%	7%	8%
Northumberland Shore	29%	21%	22%
Cape Breton Island	19%	18%	21%
Yarmouth and Acadian Shores	5%	5%	6%

% who stopped for at least 30 minutes, or overnight
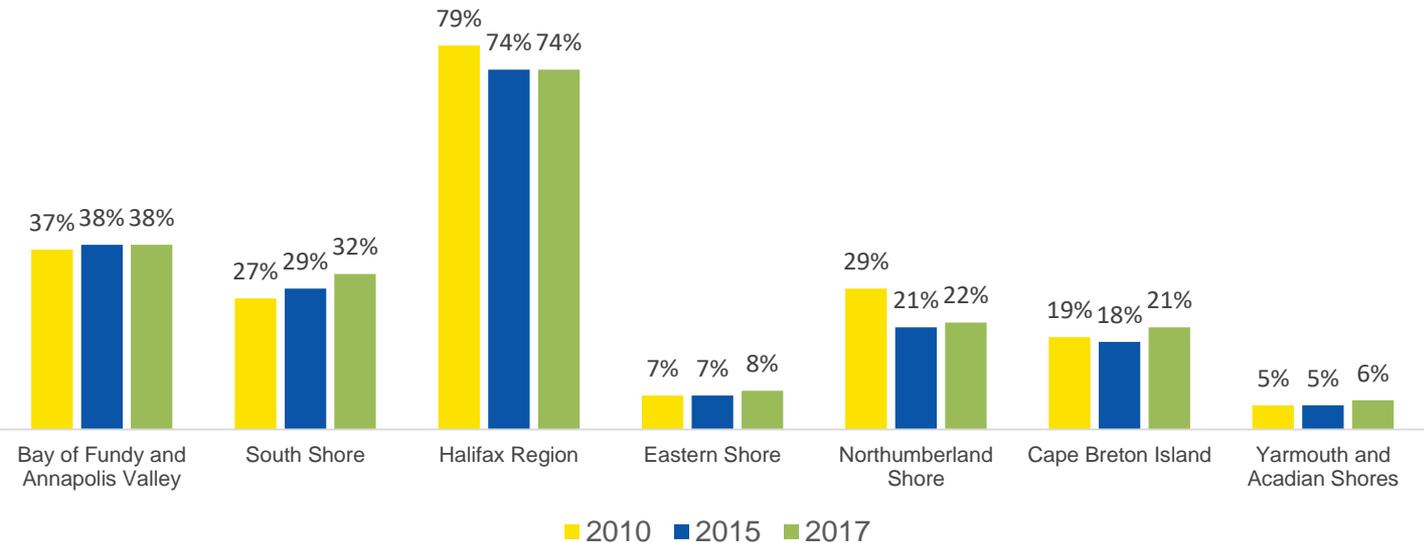
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TRIP PURPOSE

Tourism Regions
% Visited by Trip Purpose

Bay of Fundy and Annapolis Valley — Pleasure 42%, VFR 38%, Business 24%
South Shore — Pleasure 45%, VFR 26%, Business 13%
Halifax Region — Pleasure 73%, VFR 71%, Business 83%
Eastern Shore — Pleasure 10%, VFR 7%, Business 2%
Northumberland Shore — Pleasure 28%, VFR 19%, Business 10%
Cape Breton Island — Pleasure 35%, VFR 12%, Business 8%
Yarmouth and Acadian Shores — Pleasure 10%, VFR 3%, Business 2%

■ Pleasure ■ VFR ■ Business

% who stopped for at least 30 minutes, or overnight
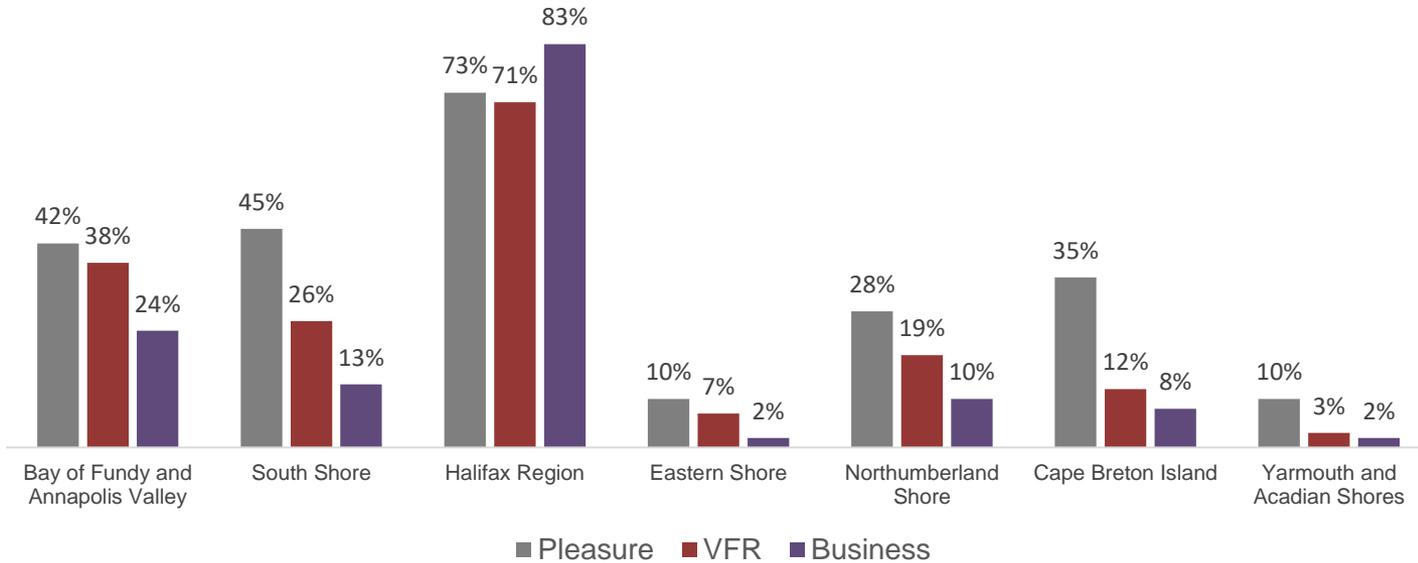
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MARKET OF ORIGIN - OVERALL

Tourism Regions
% Visited by Market of Origin

Bay of Fundy and Annapolis Valley: Canada 37%, US 44%, Overseas 47%
South Shore: Canada 29%, US 51%, Overseas 56%
Halifax Region: Canada 74%, US 71%, Overseas 86%
Eastern Shore: Canada 7%, US 8%, Overseas 13%
Northumberland Shore: Canada 22%, US 23%, Overseas 29%
Cape Breton Island: Canada 19%, US 35%, Overseas 36%
Yarmouth and Acadian Shores: Canada 4%, US 22%, Overseas 7%

■ Canada ■ US ■ Overseas

% who stopped for at least 30 minutes, or overnight
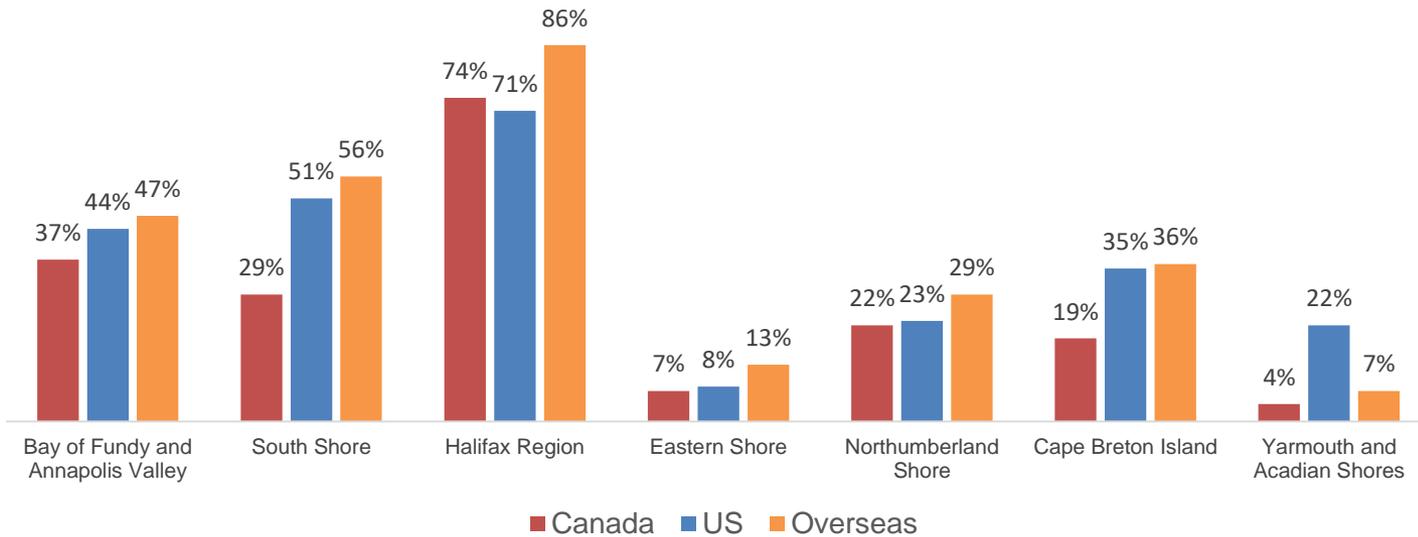
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MARKET OF ORIGIN - CANADA

Tourism Regions
% Visited by Canadian Market of Origin

Tourism Region	Atlantic Canada	Quebec	Ontario	Western Canada
Bay of Fundy and Annapolis Valley	33%	34%	40%	53%
South Shore	14%	40%	45%	55%
Halifax Region	73%	73%	72%	84%
Eastern Shore	6%	8%	9%	12%
Northumberland Shore	16%	23%	25%	38%
Cape Breton Island	11%	34%	27%	34%
Yarmouth and Acadian Shores	2%	9%	4%	10%

% who stopped for at least 30 minutes, or overnight

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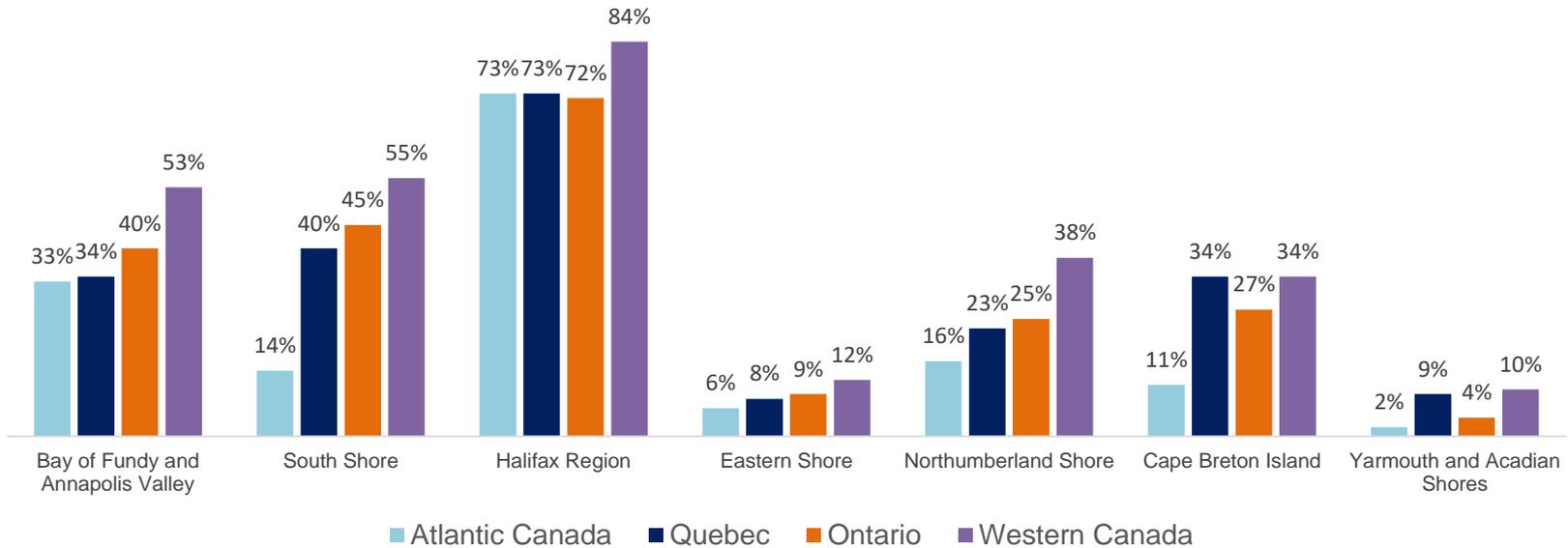
MARKET OF ORIGIN - US

Tourism Regions
% Visited by US Market of Origin

Legend: ■ New England ■ Mid-Atlantic US ■ Other US

Bay of Fundy and Annapolis Valley: New England 44%, Mid-Atlantic US 32%, Other US 48%
South Shore: New England 43%, Mid-Atlantic US 60%, Other US 54%
Halifax Region: New England 60%, Mid-Atlantic US 65%, Other US 78%
Eastern Shore: New England 12%, Mid-Atlantic US 8%, Other US 6%
Northumberland Shore: New England 21%, Mid-Atlantic US 26%, Other US 22%
Cape Breton Island: New England 32%, Mid-Atlantic US 34%, Other US 37%
Yarmouth and Acadian Shores: New England 25%, Mid-Atlantic US 25%, Other US 20%

% who stopped for at least 30 minutes, or overnight

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AIR VS. ROAD VISITORS

Tourism Regions
% Visited by Mode of Travel
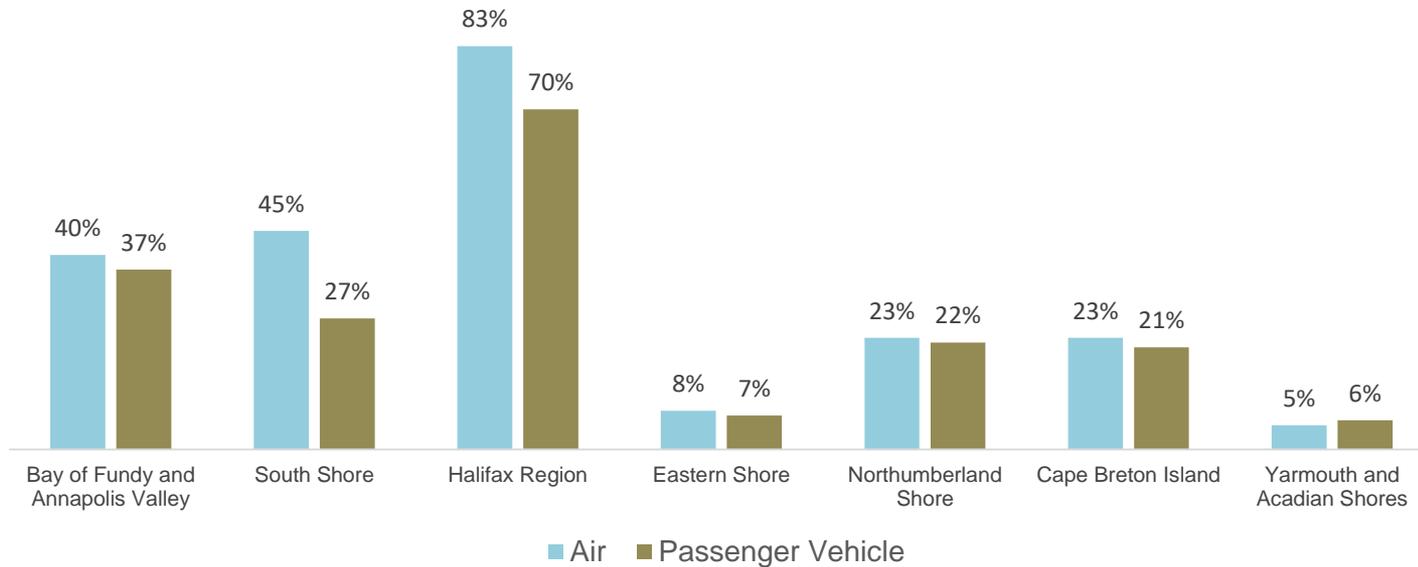
% who stopped for at least 30 minutes, or overnight

FIRST-TIME VS. RETURN VISITORS

Tourism Regions
% Visited by First-time vs. Return Visitors

Region	First-time Visitor	Return visitor
Bay of Fundy and Annapolis Valley	45%	36%
South Shore	62%	25%
Halifax Region	81%	72%
Eastern Shore	11%	7%
Northumberland Shore	31%	20%
Cape Breton Island	43%	16%
Yarmouth and Acadian Shores	14%	4%

■ First-time Visitor   ■ Return visitor

% who stopped for at least 30 minutes, or overnight

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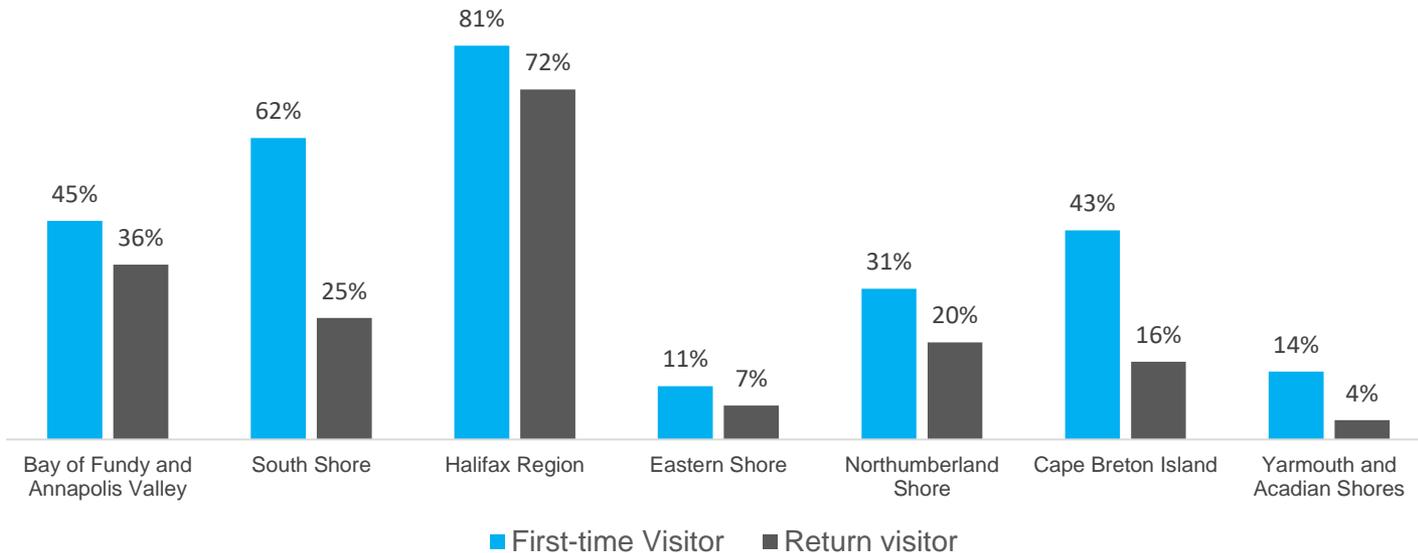
COMMUNITY VISITATION TABLES

COMMUNITY VISITATION TABLES

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.

COMMUNITY VISITATION

Bay of Fundy and Annapolis Valley Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Bay of Fundy and Annapolis Valley	38%	28%	22%	3.9	
Advocate Harbour	1%	1%	0%	1.8	2%
Annapolis Royal	4%	3%	1%	2.8	12%
Berwick	2%	2%	1%	6.5	5%
Blomidon	2%	2%	0%	2.0	6%
Bridgetown	1%	1%	0%	2.1	3%
Brookfield	1%	0%	0%	2.2	2%
Digby	7%	4%	3%	1.7	18%
Five Islands	1%	1%	0%	1.4	3%
Grand Pré	4%	4%	1%	2.4	12%
Hantsport	1%	1%	0%	3.6	2%
Joggins	1%	1%	0%		3%
Kejimkujik National Park	2%	1%	1%	1.9	4%
Kentville	4%	3%	1%	4.4	10%
Middleton	2%	1%	0%	4.5	4%
Noel	0%	0%	0%	2.8	1%
Parrsboro	1%	1%	0%	1.5	3%
Port Royal	2%	2%	0%	2.2	5%
South Rawdon	0%	0%	0%	2.5	1%
Springhill	1%	1%	0%	2.1	3%
Stewiacke	2%	1%	0%	3.2	5%
Truro	16%	9%	8%	3.2	42%
Walton	0%	0%	0%	2.3	1%
Westport	1%	1%	0%	1.7	3%
Weymouth	0%	0%	0%	2.1	1%
Windsor	3%	2%	1%	4.6	8%
Wolfville	9%	6%	3%	3.2	23%
Greenwood	1%	0%	0%	4.7	1%
Halls Harbour	1%	1%	0%	2.0	2%
Kingston	1%	0%	0%	13.0	2%
Masstown	3%	3%	0%	1.0	8%

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COMMUNITY VISITATION

South Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
South Shore	32%	28%	14%	3.9	
Bridgewater	6%	3%	2%	3.1	17%
Caledonia	0%	0%	0%	6.2	1%
Chester	5%	4%	1%	3.3	16%
Kejimkujik Seaside Adjunct	1%	1%	0%	3.5	3%
LaHave	2%	2%	0%	3.9	7%
Liverpool	3%	2%	1%	3.2	10%
Lunenburg	18%	14%	4%	2.7	55%
Mahone Bay	11%	10%	1%	2.2	35%
New Germany	0%	0%	0%	4.6	2%
New Ross	0%	0%	0%	3.2	1%
Peggy's Cove	20%	19%	1%	2.4	62%
Shelburne	2%	1%	0%	7.4	6%
Hubbards	1%	0%	0%	5.7	2%

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COMMUNITY VISITATION

Halifax Metro Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Halifax Metro	74%	31%	65%	3.3	
Bedford	12%	7%	5%	3.9	16%
Dartmouth	24%	12%	12%	3.6	32%
Halifax	62%	19%	45%	3.0	84%
Mount Uniacke	1%	1%	0%	2.5	2%
Sackville	7%	4%	3%	3.3	9%

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COMMUNITY VISITATION

Eastern Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Eastern Shore	8%	5%	4%	4.4	
Canso	1%	1%	0%	1.5	9%
Guysborough	1%	1%	0%	4.8	10%
Isaacs Harbour	0%	0%	0%	1.0	2%
Liscomb	0%	0%	0%	2.0	5%
Middle Musquodoboit	1%	0%	0%	6.7	9%
Musquodoboit Harbour	2%	1%	1%	3.9	24%
Sheet Harbour	2%	1%	1%	3.1	25%
Sherbrooke	1%	1%	0%	1.2	15%

**TOURISM
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COMMUNITY VISITATION

Northumberland Shore Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Northumberland Shore	22%	16%	12%	3.4	
Amherst	6%	5%	2%	2.1	30%
Antigonish	8%	5%	3%	3.2	36%
Cape George	1%	1%	0%	10.0	4%
Caribou	2%	2%	0%	1.0	10%
New Glasgow	6%	3%	3%	3.0	27%
Oxford	1%	1%	0%	1.0	5%
Pictou	5%	3%	2%	2.5	24%
Pugwash	1%	1%	0%	2.9	6%
Tatamagouche	2%	2%	0%	3.7	10%
Tidnish	0%	0%	0%	2.2	2%

TOURISM
NOVA SCOTIA

COMMUNITY VISITATION

Cape Breton Island Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Cape Breton Island	21%	16%	20%	4.0	
Arichat	0%	0%	0%	13.1	2%
Baddeck	9%	5%	4%	2.5	40%
Big Pond	1%	0%	0%	2.0	2%
Cape Breton Highlands National Park	6%	4%	2%	2.5	26%
Cape North	3%	2%	1%	1.8	13%
Chéticamp	7%	4%	3%	1.9	34%
Fourchu	0%	0%	0%	21.8	0%
Glace Bay	2%	2%	0%	2.8	8%
Ingonish	7%	4%	3%	1.7	33%
Inverness	3%	2%	1%	2.4	13%
Iona	1%	1%	0%	2.3	4%
Louisbourg	6%	5%	1%	1.4	27%
Mabou	2%	2%	1%	2.1	11%
Margaree	3%	1%	1%	2.2	12%
New Waterford	0%	0%	0%	4.1	2%
North Sydney	4%	2%	2%	3.2	19%
Pleasant Bay	3%	3%	1%	1.7	16%
Point Michaud	0%	0%	0%	1.0	1%
Port Hastings	2%	1%	0%	1.1	8%
Port Hawkesbury	3%	2%	1%	2.2	12%
Port Morien	0%	0%	0%		1%
St. Peter's	1%	1%	1%	3.4	7%
Sydney	7%	3%	5%	2.3	33%
Whycocomagh	1%	1%	1%	2.3	6%
Port Hood	1%	0%	1%	6.3	4%

TOURISM NOVA SCOTIA

COMMUNITY VISITATION

Yarmouth and Acadian Shores Region	Total Trips (% who stopped or stayed)	Same-day Trips (% who stopped, not overnight)	Overnight Trips (% who stayed at least one night)	Average Number of Nights Stayed	Capture Rate
Yarmouth and Acadian Shores	6%	3%	4%	2.4	
Church Point	1%	1%	0%	9.1	12%
Pubnico	1%	1%	0%	2.8	12%
Yarmouth	5%	2%	4%	1.8	88%

TOURISM
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