

BACKGROUND AND METHODOLOGY



LONG-STAY PACKAGES SURVEY – BACKGROUND

- Tourism Nova Scotia carried out a quantitative research study in the summer of 2021 to inform
 the planning and design of a program aimed at promoting long-stay visits to Nova Scotia. Long
 stays were defined as visits ranging from at least seven days, to 21 days or more.
- The main objective was to understand what visitors from the non-Atlantic Canadian market, including digital nomads, might want and be motivated by in a long-stay visit, and in packages for such visits.
- The survey was conducted with Tourism Nova Scotia's online advisory panel of approximately 80,000 members, English and French speaking, from across Canada, the United States and overseas. While the panel is not intended to be representative of any particular demographic or population, most panel members have visited Nova Scotia.



LONG-STAY PACKAGES SURVEY

AGE	%
Under 45	8
45-55	15
55-64	33
65+	43

RESIDENCE	%
Ontario	64
Quebec	9
Alberta	10
British Columbia	9
Manitoba	4
Saskatchewan	3
NT / NU / YT	0.3

- 1,874 online surveys, from our Advisory Panel.
- Data was collected between July 20 to August 3, 2021.
- Respondents were screened to reside in Canada (outside of Atlantic Canada), and be over 18 years old.
- To qualify for the survey, respondents must have said they would "definitely" or "probably" visit NS in 2021 or 2022.
 - Among all respondents who answered this question, 27% said they definitely or probably would not, or that they didn't know. These respondents did not complete the balance of the survey.
- It's important to keep in mind that these results are not necessarily representative of all NS visitors. In particular, survey respondents are somewhat likely to be **older** than typical Canadian visitors.



LONG-STAY PACKAGES SURVEY

MOST RECENT NS VISIT	%
2021	3
2020	2
2019	31
2018	19
2017	11
Before 2017	21
Never	12

 Six in 10 eligible respondents' last visit to Nova Scotia was between 2017 and 2019. One in 10 have not yet visited the province.





- There is substantial interest in making long-stay visits of between seven and 20 days in Nova Scotia in 2022. There is niche interest in very long stays of 21 days or more.
 - In unaided questioning, seven in 10 respondents who are interested in travelling to the province would stay for seven days or longer. More specifically:
 - · Four in 10 would stay seven to 13 days.
 - One-quarter would stay 14 to 20 days.
 - · One in 10 would stay 21 days or longer.
 - Asked in aided questioning to select a specific preferred period for a long-stay visit, more than half of respondents said they would come for up to 13 days, one-quarter for up to 20 days, and 14% for 21 days or more.
 - Overall, nearly four in 10 potential Canadian visitors to Nova Scotia from outside Atlantic Canada would stay for at least two weeks or more.
 - Respondents from the West/North are most likely to stay for 14+ days (47%), followed by respondents from Ontario (36%). About one-quarter of Quebec respondents (26%) are likely to stay for 14 days or more.



- The vast majority of long-stay visitors would come to Nova Scotia on a **pleasure trip** rather than for some other purpose, and the most likely time of travel would be the **summer of 2022**.
 - Those interested in trips of 14+ days are more likely to **visit friends or family** (48%) than those interested in shorter trips of fewer than 14 days (33%).
- The majority of long-stay visitors would prefer to **spend their entire visit in paid accommodations**, rather than split their time between paid <u>and</u> unpaid accommodations.
 - Visitors who would come for 14+ days are more likely (39%) than those on shorter trips (24%) to split their time between paid and unpaid accommodations.
- About half of long-stay visitors would want accommodations in small towns. A city location
 is the second most popular choice. Having an ocean view, while not critical, is also important.
 - Those visitors who would stay for 14+ days are less likely (26%) than those on shorter trips (37%) to express interest in city locations.
- The vast majority of long-stay visitors would **prefer to visit multiple parts of the province**. Only one in 10 would choose to stay in a single location.



- Long-stay visitors would be most likely to visit Cape Breton, Bay of Fundy and Annapolis
 Valley and Halifax. Most visitors would spend time in at least three separate regions.
 - Visitors who would stay for 14+ days express more interest than those interested in shorter stays in visiting all tourism regions outside of Halifax. For example, 60% of those likely to stay for 14+ days would want to visit the Bay of Fundy & Annapolis Valley, versus only 53% on shorter stays who express interest in this region.
- Private rentals are the top accommodation choice of long-stay visitors (one-quarter would choose this option). Small hotels or motels, B&Bs or inns, and large hotels are each the top choice of about two in 10 visitors. Resorts and camping options are not popular choices, however, Quebec visitors are more interested than other Canadians in camping.
 - Visitors who would stay 14+ days are less likely (12%) to want a **large hotel chain** as their first choice than are those who would stay less than 14 days (21%).
- When asked to provide their top three accommodation choices, small hotels or motels are
 the most commonly mentioned option, favoured by six in 10 long-stay visitors. Private rentals,
 B&Bs or inns and large hotels are each listed as top-three choices by about one-half of long
 stay visitors.



- Hotels both small and large are more popular top three choices among those anticipating shorter trips (63% like small hotels, 52% like large hotels) than among those anticipating a trip of 14+ days (56% like small hotels, 42% like large hotels).
- Private accommodations are more likely to be selected by those on trips of 14+ days (56%) than by those on shorter trips (47%).
- A large majority of long-stay visitors (at least eight in 10) would prefer to book their
 accommodations, food and beverages and activities separately. Only a minority would
 book packages that include accommodations plus either some or all food and beverage
 elements and activities. Those coming for shorter stays of fewer than 14 days are more
 interested in packages with everything included.
- Beach access, food take out options, and having a pub on site are the top accommodation amenities selected by long-stay visitors.
- Historical tours, beach visits and self-driving tours are the top activity preferences for long-stay visitors, chosen by almost all. Food, beverage and culinary activities are lower on the list, but still of interest to a healthy 60-70% of visitors.



- Those who would stay for 14+ days are more interested than those who would come for shorter trips in **cidery visits** (57% vs. 51%), **boating** (52% vs. 46%), **geology tours** (64% vs. 58%) and **fishing** (40% vs. 33%).
- Visitors coming for 14 days, who also wanted a package of activities, would choose an average of about seven activities during their trip or about one activity ever other day.
- Asked to provide a high and low estimate of how much they would spend on their long-stay visits (not including transportation to Nova Scotia), respondents said they would budget, on average, between \$225 and \$428 per day.
 - Those interested in trips of 14+ days would budget lower median daily amounts
 (\$150-\$300) than shorter stay visitors (\$200-\$350), presumably to spread their budget
 over a longer trip.
- Only a small minority (15%) of long-stay visitors would want to **work remotely** during their trip to Nova Scotia. Among those, most are likely to travel as couples.
- "Long-stay" is the preferred terminology to describe this kind of travel.



- Almost all long-stay visitors (92%) said they would 'probably not' or 'definitely not' want to visit
 Nova Scotia if travel restrictions changed and out-of-province visitors were required to selfisolate for 14 days upon arrival in the province.
 - While a large majority of those who would stay for 14+ days are also not interested in visiting Nova Scotia under a self-isolation requirement, they are slightly less likely to be put off by this requirement (86%) than are those would come for shorter stays (95%).



OVERALL INTEREST IN LONG-STAY VISITS

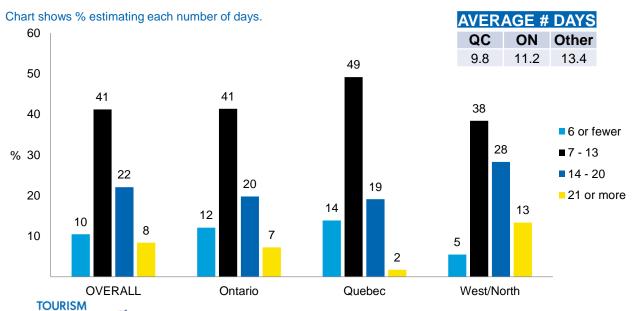


LENGTH OF STAY (UNAIDED)

NOVA SCOTIA

Thinking about your next trip to Nova Scotia in 2021 or 2022, how many days would you plan to stay in Nova Scotia?

Most potential visitors to Nova Scotia plan to stay at least seven days in the province.



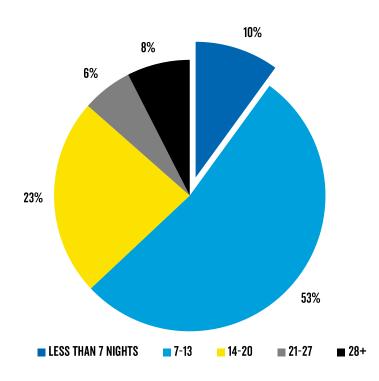
LENGTH OF STAY (UNAIDED)

Thinking about your next trip to Nova Scotia in 2021 or 2022, how many days would you plan to stay in Nova Scotia?

- Those who anticipate splitting their accommodations between paid and unpaid estimated a longer trip (13.6 days) than those who planned to stay only in paid accommodations (10.9 days).
- Those who most preferred staying in a rural location estimated a longer trip (14.0 days) than those preferring the city (10.0 days).
- Those under 55 years old estimated an average of 9.9 days, while those over aged 65 and older estimated a longer trip of 12.6 days.



LENGTH OF STAY (AIDED)



How likely would you be to visit Nova Scotia in 2021 or 2022 on a trip of the following duration...

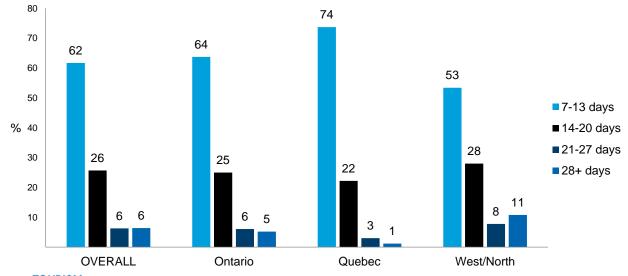
- Chart shows % definitely or probably for each duration, with the longest trip selected if a respondent selected more than one trip duration.
- Of those asked, only 10% said they would not likely consider <u>any</u> of the trip lengths of 7 days or more.
 - Note: these respondents would then have skipped to the end of the survey, so are not included in any further data.
- About half would spend a maximum of between 7 and 13 days, while more than one-third would spend 14 days or more.
- These results are consistent with the unaided trip length estimates offered by respondents earlier in the survey.



LENGTH OF STAY (AIDED)

How likely would you be to visit Nova Scotia in 2021 or 2022 on a trip of the following duration...

- Chart shows % choosing **definitely** or **probably** for each duration, with the longest trip selected if a respondent would consider more than one trip duration.
- A majority of visitors would prefer a trip of 7-13 days, with about one-quarter considering a trip of 14-20 days.





LENGTH OF STAY (AIDED)

How likely would you be to visit Nova Scotia in 2021 or 2022 on a trip of the following duration?

- Those from farther away are more likely to consider staying longer: those from West/North are more likely to choose *all* of the longer durations compared with residents of Quebec and Ontario. Among Ontarians, four in 10 would stay for 14 days or more.
- Those whose preference is for staying in cities are most likely to choose a trip under 14 days (69%), while those preferring a rural location are about equally likely to choose a trip under 14 days (54%) or 14 days or more (46%).
- Those likely to stay 14 or more days are somewhat more likely (39%) to split their accommodations between paid and unpaid than are those choosing shorter durations (24%).



'ASSUME YOU ARE COMING FOR A LONG STAY VISIT...'



ANTICIPATED TRAVEL DETAILS

PARTY COMPOSITION	%
Family / Families with children	11
A couple	61
Other (alone, friends, etc.)	28

TRAVEL PURPOSE	%
Pleasure	86
Change of scenery	42
VFR	38
Other	11

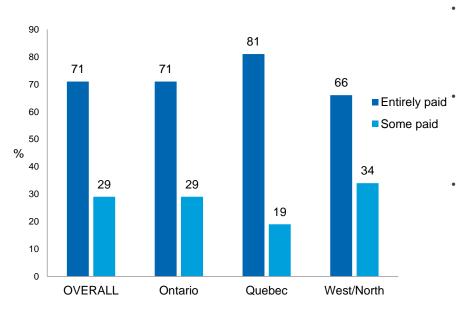
- Which of the following would best describe your travel party?
- Assuming you did travel to Nova Scotia for a long-stay vacation, what would be your main reason(s) for doing so?
- When would you most likely travel to Nova Scotia for a longstay visit?
- Six-in-ten visitors anticipate that they would travel as a couple, consistent with how visitors typically travel to Nova Scotia.
- Most would travel for pleasure, with less than half visiting friends/family or for a change of scenery.
- Those interested in stays of 14 days or longer are more likely to want to visit friends or family (48%) than those interested in shorter stays (33%).



PAID ACCOMMODATIONS USE

Which of the following options would you choose for such a visit?

Chart shows % selecting each option.

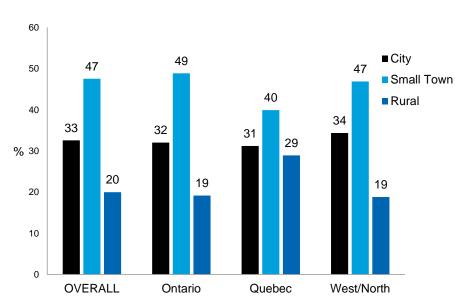


- Overall, seven in ten would rely on paid accommodations, with three in ten indicating they would include both paid and unpaid accommodations during their visit.
 - Those who would travel as a couple are more likely than those who would travel with children to stay entirely in paid accommodations (72% vs. 65%).
- Travellers under the age of 45 are more likely than those aged 65 and older to stay in a mix of paid/unpaid accommodations (38% vs. 26%).



ACCOMMODATION LOCATION

- Which of the following types of locations would you most prefer for your long-stay Nova Scotia visit?
- Chart shows % selecting each type of location as their **top choice**.

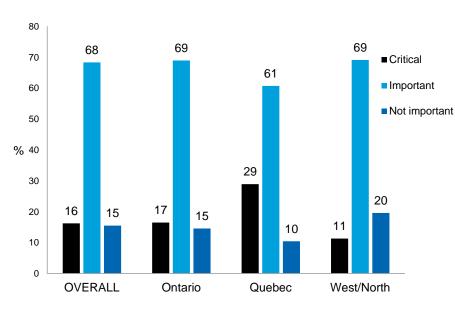


- Small towns are the preferred location for approximately onehalf of long-stay travellers, followed by a city stay (33%), with rural areas being the least preferred location.
- Notably, rural areas are more likely to be identified by Quebec residents (29%) are as their preferred location.
- Travellers under 45 years of age are more likely than those aged 65 and older to prefer the city (40% vs. 30%).
- Those staying 14 days or longer are less likely to prefer a city location (26%) than those planning a shorter trip (37%).



OCEAN VIEW AT ACCOMMODATIONS

- How important is having a view of the ocean at your accommodations?
- · Chart shows % selecting each.

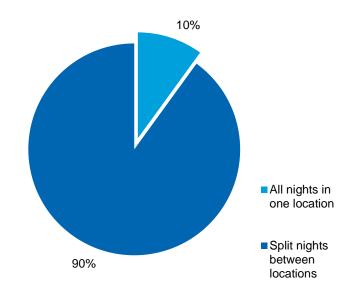


- Results indicate that while an ocean view is desirable, it is not a critical consideration for most travellers.
- An ocean view is more likely to be critically important for those who would prefer to stay in rural locations compared with those who would prefer to stay in a city (24% vs. 12%).
- An ocean view is also more important for those travelling as a family compared with those travelling as a couple (23% vs. 15%).



ONE OR MORE LOCATIONS

Chart shows % selecting each option.



Which one of the following options would you most prefer?

- The vast majority of travellers indicate that, for a long-stay vacation in Nova Scotia, they would NOT stay in a single location, rather, they would split their nights between locations.
- Only one in ten would want to stay at a single location for their entire visit.



TOURISM REGIONS

REGION	%
Cape Breton Island	60
Bay of Fundy & Annapolis Valley	56
Halifax	54
South Shore	45
Northumberland Shore	28
Eastern Shore	27
Yarmouth & Acadian Shores	25

NUMBER OF REGIONS SELECTED	%
1	19
2	16
3	27
4	18
5 or more	15
AVERAGE NUMBER SELECTED	2.9



In which of the following Nova Scotia regions are you likely to stay during your long-stay Nova Scotia visit?

- Note: Multiple selections possible; first table shows % selecting each region, and second shows how many regions were selected.
- Three regions Cape Breton Island, Halifax, and Bay of Fundy/Annapolis Valley, are selected by just over one-half of travellers as regions where they would be likely to stay.
- On average, travellers expect to visit three different regions.
- Those under 45 years are more likely to choose Halifax (68%) compared with all other age groups (all under 60%).
- Those who plan to visit Cape Breton or Yarmouth/Acadian Shores are less likely than those visiting other regions to plan to stay in a mix of paid and unpaid accommodations.

TOURISM REGIONS

In which of the following Nova Scotia regions are you likely to stay during your long-stay Nova Scotia visit?

- Note: Multiple selections possible; first table shows % selecting each region, and second shows how many regions were selected.
- Those interested in longer trips of 14 days or more show a stronger preference than those expecting to take shorter trips for visiting tourism regions *outside of Halifax*. For example:
 - While 53% of those likely to stay for less than 14 days are interested in visiting the Bay of Fundy & Annapolis Valley, 60% of those likely to stay 14 days or longer are interested in this region.
 - While 24% of those likely to stay for less than 14 days are interested in visiting the Northumberland Shore, 33% of those likely to stay 14 days or longer are interested in this region.
 - The same dynamic is true for all regions except Halifax the only region of greater interest to those on shorter trips (56%) than those on longer trips (52%).

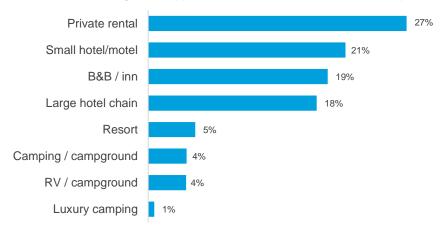


TYPE OF ACCOMMODATIONS – TOP CHOICE

Which one of the following types of paid accommodations would you most prefer?

The most popular choice of paid accommodation for a long-stay visit in Nova Scotia is renting a
privately-owned cottage, house, or apartment, followed by a small hotel/motel, B&B/inn, or large
hotel.

Chart shows % selecting each type of accommodations as their top choice.





TYPE OF ACCOMMODATIONS – TOP CHOICE

Which one of the following types of paid accommodations would you most prefer? (Top choice only)

- While there is little difference in top accommodation choices among those interested in shorter and longer stays, visitors who would stay 14 or more days are less likely to want a large hotel chain as their first choice (12%) than are those interested in staying less than 14 days (21%).
- Preference for renting private accommodations is highest among younger travellers, and those who travel with children. Preference for B&B/inns is highest among those aged 65 years and older.
- While still at a low level overall, Quebec residents are much more likely than others to choose camping (16% vs. 3%).
- Those whose preference is for staying in cities are most likely to prefer staying at a large hotel chain, while renting private accommodations is more likely to be top choice for rural, and B&B/inn is just behind private accommodations among those whose preference is to stay in small towns.

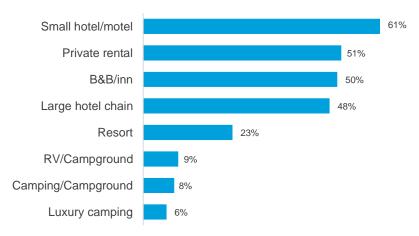


TYPE OF ACCOMMODATIONS – TOP 3 CHOICES

Which one of the following types of paid accommodations would you **most** prefer? / And please select your **second and third** accommodations choices from the list.

• Examining respondents' top three choices for paid accommodations on long-stay visits to Nova Scotia, about half would consider each of a small hotel, private rental, B&B/inn, or large hotel.

Chart shows % selecting each type of accommodations in their top 3 choices.





TYPE OF ACCOMMODATIONS – TOP 3 CHOICES

Which one of the following types of paid accommodations would you **most** prefer? / And please select your **second and third** accommodations choices from the list.

- By party type, couples are more likely than those travelling as families to prefer small hotel and B&B/inns, while families are more likely to prefer private accommodations.
- Quebec residents are much *more* interested in both RV and camping compared with those from other regions but are *less* likely to consider private accommodations and B&B/inns.
- Preference for small hotels and B&B/inns increases with age group, while interest in private accommodations decreases with age.
- Hotels both small and large are more popular choices among those anticipating a trip under 14 days (small hotels-63%, large hotels-52%) than among those anticipating trips over 14 days (small hotels-56%, large hotels-42%).
- Meanwhile, private accommodations are particularly likely to be chosen by those on longer trips (56%) than those on shorter trips (47%).

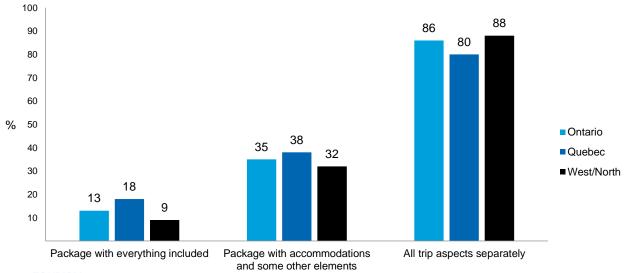


INTEREST IN PACKAGES

Please indicate how likely you would be to book...

- Note: respondents evaluated each description separately.
- There is interest among a minority of travellers to book a long-stay package with everything included, or a long-stay package that includes accommodations and some other activities/experiences.

Chart shows % selecting definitely or probably for each type of package.





TYPE OF PACKAGE

Please indicate how likely you would be to:

- Book a package that includes **everything** for the duration of a long-stay visit, including accommodations, food/beverages, and activities/experiences.
- Book a package that includes accommodations along with some food/beverages and activities/experiences for a long-stay visit. You would arrange other food/beverages and activities/experiences separately.
- Book your accommodations, food/beverages, and activities/experiences all separately.
- · Note: respondents evaluated each type of option separately, so could have indicated interest in more than one option.
- Interest in packages (partial or all-inclusive) is somewhat higher among Quebec residents, than those living elsewhere in Canada.
- Those under 55 years of age are more likely than older travellers to consider a package with everything included (19% vs. 10%).
- Interest in packages is higher among those who have not yet visited Nova Scotia, compared with those who have already travelled to the province.

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TYPE OF PACKAGE

- People who prefer a package that includes everything anticipate staying fewer days (10.5) as opposed to those who would book everything separately (12.5).
- Families with children (19%) are somewhat more inclined than couples (10%) to prefer a package that includes everything.
- Preferred accommodations for those who would prefer a package include the range of offerings although small or large hotels are substantially above everything else.
- Those preferring a package that includes everything show roughly equal preference for city and small town locations (double the preference for rural), while those aiming to book everything separately more strongly prefer a small town over the other settings.
- Those preferring a package that includes everything are somewhat more likely to say an ocean view from their accommodations is critical (24%) versus those who would book everything separately (16%).



PACKAGED ACTIVITIES

TRIP LENGTH	# ACTIVITIES
7 days	4.2
14 days	7.4

If you stayed for **seven - 14** days, how many activities or experiences overall would you want to book as part of a package for the duration of your visit?

- Overall, these visitors would prefer roughly one activity or experience every other day included in a package.
- There are no notable differences between groups in the number of activities that visitors would expect to be included in a package.



AMENITIES

How interested would you be in each of the following amenities during a long-stay vacation package?

Table shows % very or somewhat interested.

	%
Nearby beach access	91
Food take out options	87
Pub on site	71
Fine dining on site	69
Swimming pool	69
Farmers market food box	63
Food delivery to room	53
Hot tub or sauna	50
Room service	35
Golf on site	18
Organized children's activities	7

- Overall, visitors are most likely to be interested in nearby beach access and food take out options, while comparatively few would be interested in having golf on site or organized children's activities.
- However, half of those travelling as a family are interested in organized children's activities. They are also more likely than couples to be interested in:
 - Pool, farmers market food box, food delivery to room, and hot tub/sauna.
- Meanwhile, couples are more interested than families in pubs and fine dining.
- Quebec residents are more likely than others to be interested in fine dining and room service, but less interested in golf.
- Quebec and Ontario residents are more interested in having a pool than those from West / North.



ACTIVITIES

Table shows % Very or Somewhat interested.

	%
Historical sites and tours	95
Beach visits	90
Self-driving tours	90
Nature experiences	84
Walking/hiking	84
Arts and cultural experiences	81
Fine dining	73
Winery visits and wine tasting	71
Culinary experiences	66
Distillery visits and spirit tasting	62
Microbrewery visits and beer tasting	61
Geology or fossil tours	60
Cidery visits and cider tasting	53
Boating activities	48
Ocean adventure activities	46
Recreational fishing	36
Cycling	29
Golfing	23
Yoga and exercise classes	12
Hunting	4

How interested would you be in each of the following experiences during a long-stay vacation package?

- There is strong interest in many of the listed experiences, with historic sites, beaches, and self-driving tours generating the most interest.
- Those who would stay for 14 days or longer are more interested than those who would come for shorter trips in cidery visits (57% vs. 51%), boating (52% vs. 46%), geology tours (64% vs. 58%) and fishing (40% vs. 33%).
- Families, as compared to couples, are more interested in:
 - Nature, walking/hiking, boating, ocean adventure, fishing, cycling, geology/fossil tours.
- Couples, as compared to families are more interested in:
 - Alcohol-related (winery, brewery, etc.), as well as fine dining.
- Quebec residents are more likely than others to be interested in fine dining, boating, ocean adventure and cycling. They are less interested in golf and fishing.

BUDGET

Lowest/Highest amount in dollars per day.

	LOWER	UPPER
OVERALL	\$225	\$428
Party Com	oosition	
Couple	\$239	\$442
Family	\$220	\$499
Location Pre	eference	
City	\$228	\$438
Small town	\$237	\$444
Rural	\$192	\$372
Travel Timing		
Summer 21	\$199	\$422
Summer 22	\$216	\$417
Off-Peak	\$244	\$447
Package Preference		
Everything included	\$268	\$516
Everything separate	\$212	\$416

How much would you budget to spend on accommodations, food, and any activities and experiences you might purchase (excluding transportation to/from Nova Scotia) on your long-stay visit?

- In general, travellers expect to spend between roughly \$200 and \$400 per day.
- Those interested in longer trips of 14 or more days would budget lower *median* daily amounts (\$150-\$300) than shorter stay visitors (\$200-\$350).
- The upper limit of the budget for families is higher than the upper limit for couples.
- Those preferring to stay in rural settings expect to spend less than those who prefer to stay in cities and small towns.
- Those expecting to travel between fall of 2021 through spring of 2022 expect to spend more than those wanting to travel in the summer of 2022.



REMOTE WORK

How likely are you to want to combine work with a long-stay visit – in other words, to work remotely during your visit to Nova Scotia?

- Overall, **15%** are very or somewhat likely to work remotely on their NS visit, but notably, 33% of families anticipate combining work with their visit.
- Of those likely to work remotely, 46% would travel as a couple and 25% as a family.
- Remote workers, as compared to those unlikely to combine work and travel, are also
 particularly likely to prefer private accommodations, and to have a preference for the city or
 small towns compared with rural locations. Relatedly, they are also more likely to have
 selected Halifax as a region to visit.
- Remote workers are also somewhat more likely to prefer an all-inclusive package (17%) than those who are unlikely to work remotely (11%).
- Remote workers are more likely to say they are travelling for a change of scenery (52%, vs. 41% for those unlikely to work remotely).



REMOTE WORK

Which of the following would be important to you while working remotely during your longstay visit?

Table shows % selecting each amenity.

AMENITIES FOR REMOTE WORK	%
High speed internet access	87
Workstation in your accommodations	45
Workstation or work hub facility on the premises of your accommodation	20
Public-access work hub center or facility in the cities or communities you are visiting	16

• The most important requirement for most potential remote workers is high speed internet access, while the listed types of dedicated workspaces are comparatively less important.



TERMINOLOGY

Which of the following terms do you think best describes this type of trip to Nova Scotia?

• Table shows % selecting each option. Note: respondents could select multiple options.

	%
Long-stay	48
Don't know / Not sure	22
Extended stay	17
Other	10
Long-term stay	4
Vacation / Holiday	3

- Nearly half of respondents agree that, as used throughout this survey, "long-stay" is the best term to describe this type of trip.
- · Otherwise, there is no clear consensus on any other terminology.



SELF-ISOLATION REQUIREMENT

If travel restrictions to Nova Scotia change, and out-of-province visitors are required to self-isolate upon arrival, how likely would you be to visit Nova Scotia in 2021 and self-isolate for 14 days in paid accommodations prior to being able to travel around the province?

Table shows % selecting each option.

	%
Definitely not	70
Probably not	22
Probably	4
Definitely	2
Don't know / Not sure	2

- Very few potential visitors reported interest in travelling to Nova Scotia if COVID-19 isolation restrictions are reinstated, with more than 90% saying that they would probably or definitely not do so.
- Although few of those who would visit Nova Scotia for 14 days or longer are likely to want
 to travel to the province with isolation restrictions in place, longer-stay visitors are
 somewhat less likely to be turned off by such restrictions (86%) than are those interested
 in shorter stays (95%).

