



Voice of the Visitor 2025



Report Prepared for:
Nova Scotia Department of Communities, Culture, Tourism and Heritage

February 2025

Confidential: Reproduction in whole or in part is not permitted without expressed permission of Tourism Nova Scotia / Nova Scotia Department of Communities, Culture, Tourism and Heritage

Background

Tourism Nova Scotia's Voice of the Visitor survey program is a valuable opportunity for tourism businesses, organizations, and government partners to gain insights about visitors' perspectives on important topics of interest to their business or organization.

The Voice of the Visitor survey program is administered through Tourism Nova Scotia's Online Advisory Panel, which consists of past visitors to Nova Scotia from across Canada, the United States and overseas, who are ages 18 years of age or older and have taken an overnight leisure trip to Nova Scotia on at least one occasion between 2018 and 2024. Survey question design is conducted in close consultation with TNS, with surveys available in both English and French.

The following report presents detailed results for questions asked on behalf of the Climate Adaptation Team at **Nova Scotia's Department of Communities, Culture, Tourism and Heritage**. A list of these questions and the relevant data tables are provided in Appendix A and B of this report.

For this survey, data was collected from January 6 to 19, 2025, with 621 surveys completed. The following table provides a detailed breakdown of the final number of completes within each market.

| Region | Number of recent visitors |
|--|---------------------------|
| Canada | 427 |
| Ontario | 207 |
| Quebec | 94 |
| West/Territories | 78 |
| Atlantic Canada | 47 |
| Other Unspecified (Canada) | 1 |
| United States | 156 |
| Other (outside Canada and the US) | 38 |
| Total | 621 |

All results are expressed as a percentage, with numbers also provided where appropriate. Note, in some cases, percentages do not add up to exactly 100% due to rounding, or in situations where multiple responses were collected. Certain questions explore various sub-group analyses. Sub-group analysis involves breaking data down by specific demographics or responses (e.g., age, gender, country of origin, travel party type). This approach helps identify differences in responses across various segments. When reviewing results for certain questions, a small sample size for specific audiences (e.g., younger visitors) warrants caution in the interpretation of results.

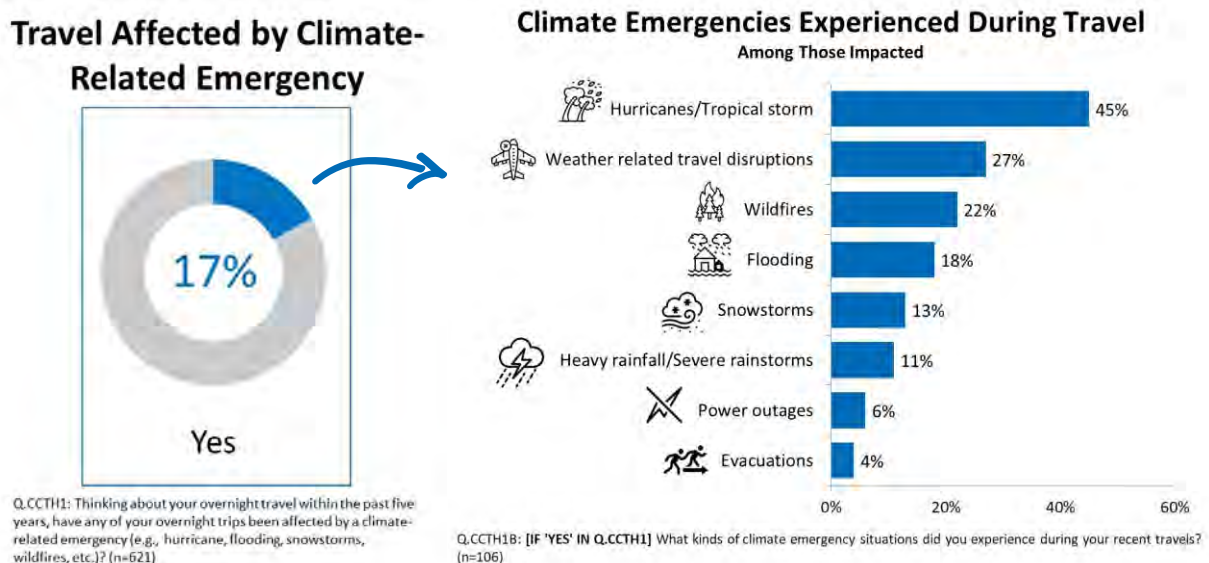
Overview of Results

Impact of Climate-Related Emergencies on Tourism

A notable minority of recent travellers have had their travels impacted by climate-related emergencies.

Recent visitors were asked if any of their overnight trips to Nova Scotia were affected by a **climate-related emergency such as hurricane, flooding, snowstorms, wildfires, etc.** Overall, approximately one in six (17%) report their trip was affected by a climate-related emergency in some way.

Canadian visitors from the West/Territories more commonly report their trip was affected compared to Canadian visitors from other provinces. (Table CCTH1)



Among visitors whose overnight trips were impacted by climate-related emergencies (106 visitors), nearly one-half say it was due to a **hurricane or tropical storm**. One-quarter state there were **weather-related travel disruptions**, and slightly fewer cite **wildfires** or **flooding**. Fewer visitors say **snowstorms**, **heavy rainfall**, **power outages**, or **evacuations** affected their travel plans.

American visitors are more likely than Canadian visitors to report that **hurricanes** or **travel disruptions** impacted their travels. (Table CCTH1b)

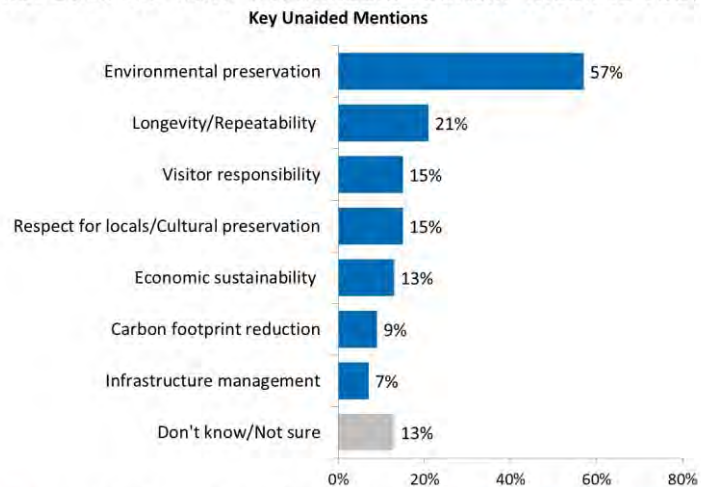
Sustainable Tourism

While the concept of sustainable tourism is widely recognized, there is room to expand visitors' perception of the term beyond environmental protection to raise awareness of its long-term benefits.

To assess visitors' understanding of sustainable tourism, they were first asked, what "sustainable tourism" meant to them.

Overall, a slight majority of visitors relate sustainable tourism to **environmental preservation** (i.e., minimizing environmental harm, supporting resource conservation, prioritizing/undertaking eco-friendly practices, etc. while travelling). At the same time, two in ten defined the term in relation to **ensuring tourism longevity/repeatability**, whereby future generations can enjoy and partake in the same destinations and experiences. Fewer provide alternative interpretations, including it being a **visitor's responsibility to minimize negative impacts on a destination** (e.g., leaving no trace, avoiding waste and being mindful), **respecting/honouring locals and cultural preservation**, and sustainable tourism being **tied to economic sustainability** (e.g., supporting the local economy and job creation), among others. Other interpretations were each mentioned by fewer than 10 percent of visitors. Of note, 13 percent of travellers were unsure or unable to provide a definition of the term.

What Does the Term 'Sustainable Tourism' Mean to You?



Q.CCTH2: What does the term 'Sustainable Tourism' mean to you? (n=500) Note: A random 500 responses were coded for this question.

Those with higher annual household incomes (i.e., above \$75,000 CAD), are more likely than those with annual household incomes of \$75,000 CAD and lower to define sustainable tourism in relation to environmental preservation.

Sustainability holds some weight in travel decisions and purchases, albeit to a limited degree, with clear opportunities to build awareness on issue.

After offering their own interpretation, all visitors were provided with the definition that *‘Sustainable Tourism’ refers to the practices by tourism operators and attractions that minimize negative economic, social, and environmental impacts of their activities, while supporting positive impacts such as job creation, cultural heritage preservation and interpretation, wildlife, and landscape preservation, etc.*

With that context, visitors were asked how often they considered sustainability when making their travel decisions and purchases over the past few years.

Overall, two-thirds of visitors stated that it is a consideration at least some of the time, with 20 percent saying that it is **always** a consideration in their travel plans. Conversely, fewer than 20 percent say they **rarely** think of it, while a similar proportion state it is **never** a consideration for them.

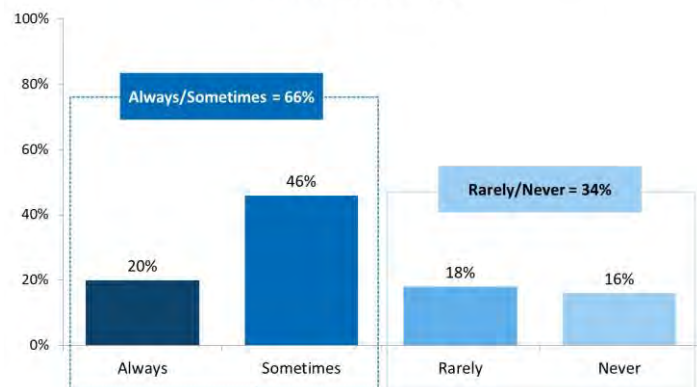
Across travel party type, couples with children are least likely to report always considering sustainability when making travel decisions and purchases.

Conversely, among Canadian visitors, those living in Quebec are more likely than those living elsewhere to report sustainable tourism **always** being a consideration.

Those who report ‘always’ or ‘sometimes’ considering sustainability (408 visitors), visitors were asked to provide specific ways they considered sustainability.

Efforts to support the local economy (i.e., patronizing local shops/businesses, restaurants, markets, etc.) was mentioned by one-third of travellers, while fewer reported choosing **eco-friendly transportation** (e.g., walking, public transit), **waste reduction** (e.g., using reusable products, recycling, composting, etc.), **respecting/protecting nature/wildlife**, and engaging in **low-impact recreation**

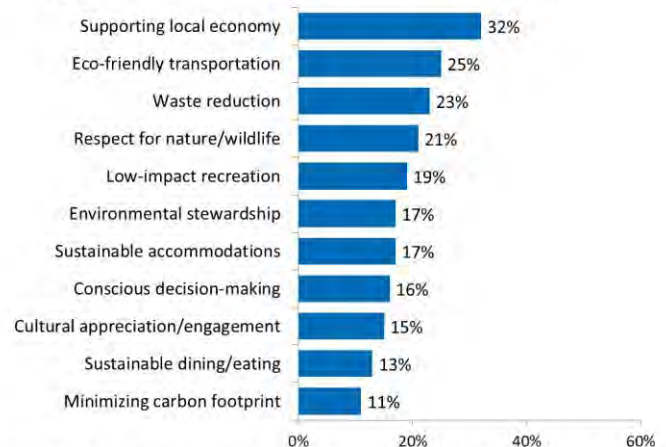
Frequency of Considering Sustainability When Travelling



Q.CCTH3: Thinking about your travel over the past few years, how often have you considered sustainability when making your travel decisions and purchases? (n=621)

Sustainability Considerations

Key Unaided Mentions Among Those Who Consider Sustainability



Q.CCTH3B: [IF 'ALWAYS' OR 'SOMETIMES' IN Q.CCTH3] In what ways have you considered sustainability when making your travel decisions and purchases? (n=408)

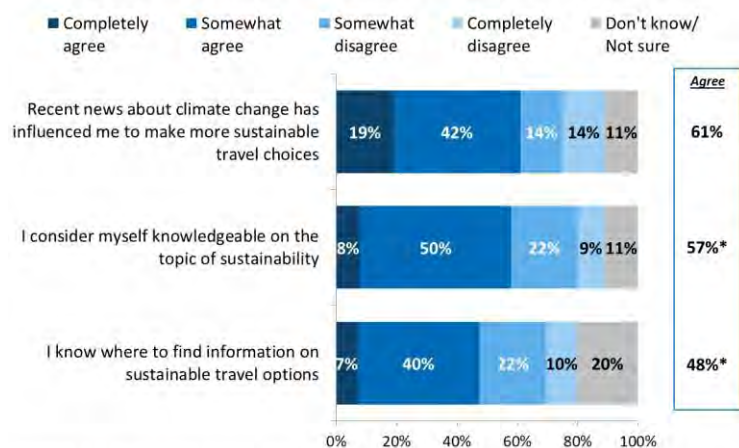
(i.e., activities with minimal environmental impact such as hiking). Other sustainable considerations mentioned slightly less frequently include **environmental stewardship** (e.g., cleaning up the environment, conservation efforts), **choosing sustainable accommodations** (i.e., eco-friendly lodgings or locally owned establishments), **general conscious decision-making** (e.g., avoiding over-touristed areas), **cultural appreciation/engagement activities**, **sustainable dining/eating**, and **making efforts to minimize their carbon footprint**.

Women and those travelling for business purposes are more likely than their respective counterparts to report supporting the local economy as the way they consider sustainability when making travel decisions and purchases.

To further explore travellers' awareness and understanding of sustainable tourism, visitors were asked to indicate their level of agreement with various statements.

Six in ten travellers agree that **recent news about climate change has influenced them to make more sustainable travel choices**, of which two in ten *completely* agreed with this statement. Among Canadian travellers, Quebec residents are most likely to agree that recent news on climate change has influenced them to make more sustainable travel choices (QC: 73% vs. Canada Overall: 59%).

Agreement with Statements on Sustainable Tourism



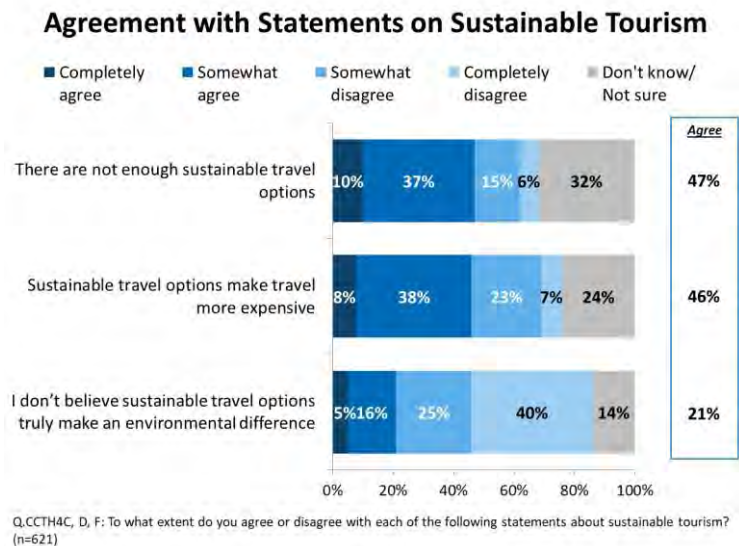
Q.CCTH4A, B, E: To what extent do you agree or disagree with each of the following statements about sustainable tourism? (n=621) *Due to rounding.

In terms of self-reported knowledge, a slight majority of past travellers agree that they would **consider themselves knowledgeable on the topic of sustainability**, of which fewer than 10 percent offer complete agreement to this statement. Men are more likely than women to consider themselves knowledgeable on the topic of sustainability (63% vs. 53%).

When it comes to finding information on sustainable tourism options, one-half of visitors offer some level of agreement that they **know where to find information on sustainable travel options**, and less than one in ten offer complete agreement to this statement. Among Canadian visitors, those in Atlantic Canada are least likely to agree they know where to find information on sustainable travel options (Atlantic Canada: 30% vs. Canada Overall 45%).

Of note, those who consider themselves knowledgeable on the topic of sustainability are more likely than their counterparts to offer some level of agreement that recent news has influenced them to make more sustainable travel choices, and report knowing where to find information on sustainable travel options.

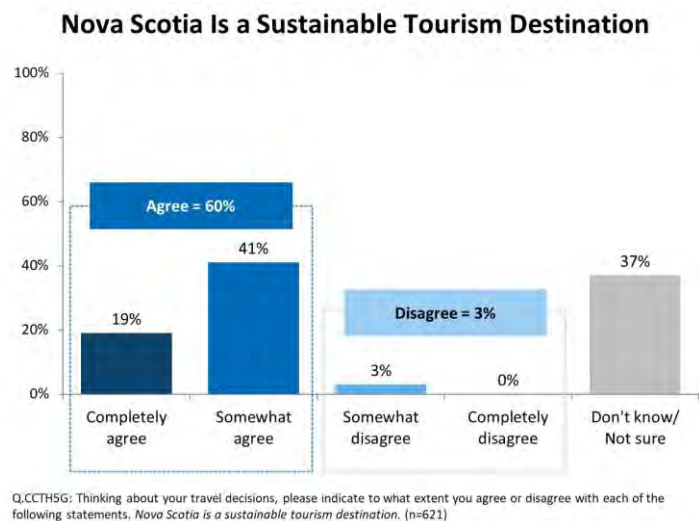
Nearly one-half of travellers offer some level of agreement that **there are not enough sustainable travel options available**, while the same proportion agree **sustainable travel options make travel more expensive**. That said, only 10 percent offer complete agreement with each statement. A notable minority were unable to offer a response to these statements, particularly in relation to there being enough sustainable travel options, and the expense of sustainable travel.



Across travel party types, couples travelling with children are most likely to agree sustainable travel options are more expensive (58%). At the same time, among Canadian travellers, Quebec residents are most likely to agree there are not enough sustainable travel options (QC: 53% vs. Canada Overall: 44%), and least likely to agree that these choices make travel more expensive (QC: 32% vs. Canada Overall: 44%).

Overall, 40 percent of travelers firmly believe that sustainable travel options do make a positive environmental impact, the majority share this view, with only 20 percent expressing doubt. Men are slightly more likely than woman to agree that they **don't believe sustainable travel options truly make an environmental difference** (26% v. 17%).

Overall, 60 percent of travellers offer some level of agreement that **Nova Scotia is a sustainable tourism destination**, with the majority of those offering more modest levels of agreement (41% somewhat agree vs. 19% completely agree). That said, only three percent disagree with the statement, with a substantial minority expressing uncertainty. Indeed, more than one-third of travellers are unsure whether or not Nova Scotia is a sustainable tourism destination.



Nearly all visitors agree they **support local businesses when travelling**, with the vast majority offering complete agreement.

Travellers appear keen to learn more about sustainable tourism. Indeed, more than three-quarters of visitors are **interested in learning more on how to travel more sustainably**, with one-third offering complete agreement. Moreover, a slight majority offer some level of agreement that they would be willing to pay more for sustainable travel options, although only 10 percent offer complete agreement.

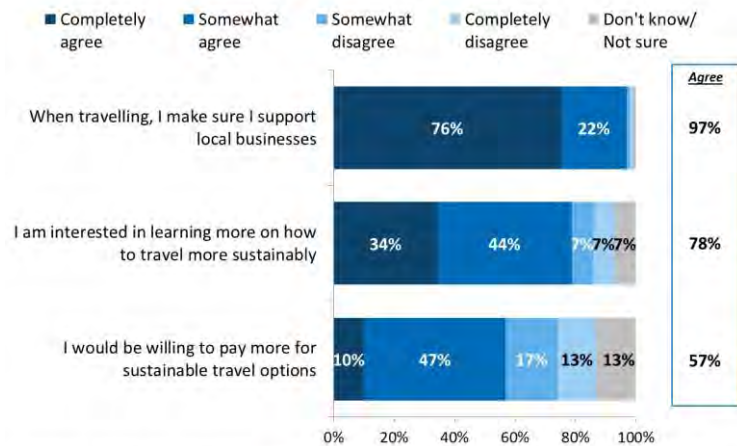
With the exception of willingness to pay more, these findings are generally consistent across demographics. Men, those living outside of Canada, and those living in more affluent households (i.e., those with annual household incomes above \$50,000) are more likely than their respective counterparts to agree they would be willing to pay more for sustainable travel options. (Tables CCTH5a-c)

Results show that two-thirds of travellers agree they **seek out products or services from businesses that promote sustainability**, with 18 percent offering complete agreement. Moreover, when it comes to **looking for activities or experiences with a sustainable certification or label** and **looking for accommodation with a sustainable certification or label**, four in ten offer some level of agreement to each statement.

Of note, a notable minority of visitors are unable to provide a response to each of these questions (i.e., 11-18% offering a response of don't know or not sure to each statement).

Across regions, those living in Canada are least likely look for a sustainable certification, either when seeking out activities/experiences or looking for accommodations. (Tables CCTH5d-f)

Making Personal Travel Decisions



Q.CCTH5A-C: Thinking about your travel decisions, please indicate to what extent you agree or disagree with each of the following statements. (n=621) Mentions of 2% or less are represented as a bar.

Making Personal Travel Decisions



Q.CCTH5D-F: Thinking about your travel decisions, please indicate to what extent you agree or disagree with each of the following statements. (n=621)

Appendix A: Question List - Nova Scotia Department of Communities, Culture, Tourism and Heritage

CCTH 1. Thinking about your overnight travel within the past five years, have any of your overnight trips been affected by a climate-related emergency (e.g., hurricane, flooding, snowstorms, wildfires, etc.)?

CCTH1B. What kinds of climate emergency situations did you experience during your recent travels? Please be as specific as possible.

CCTH 2. What does the term ‘**Sustainable Tourism**’ mean to you?

CCTH 3. Sustainable tourism refers to the practices by tourism operators and attractions that minimize negative economic, social, and environmental impacts of their activities, while supporting positive impacts such as job creation, cultural heritage preservation and interpretation, wildlife and landscape preservation, etc.

Thinking about your travel over the past few years, how often have you considered sustainability when making your travel decisions and purchases?

CCTH 3B. In what ways have you considered sustainability when making your travel decisions and purchases? Please be as specific as possible.

CCTH 4. To what extent do you agree or disagree with each of the following statements about sustainable tourism?

| |
|---|
| a. I consider myself knowledgeable on the topic of sustainability |
| b. Recent news about climate change has influenced me to make more sustainable travel choices |
| c. Sustainable travel options make travel more expensive |
| d. There are not enough sustainable travel options |
| e. I know where to find information on sustainable travel options |
| f. I don't believe sustainable travel options truly make an environmental difference |

CCTH 5. Thinking about your travel decisions, please indicate to what extent you agree or disagree with each of the following statements.

| |
|--|
| a. I am interested in learning more on how to travel more sustainably |
| b. I would be willing to pay more for sustainable travel options |
| c. When travelling, I make sure I support local businesses |
| d. I look for accommodation with a sustainable certification or label |
| e. I look for activities/experiences with a sustainable certification or label |
| f. I seek out products or services from businesses that promote sustainability |
| g. Nova Scotia is a sustainable tourism destination |