

Nova Scotia Tourism Market Profile: Overseas

This bulletin summarizes research findings for the overseas visitor market from the 2010 Visitor Exit Survey, including new insights on the pleasure visitor segment. For additional information, please refer to the 2010 Visitor Exit Survey and the Facts and Figures Section of the Tourism Research website, available at www.gov.ns.ca/econ/tourism/research.

Market Highlights

NS Tourism Market: 2.1 million visitors

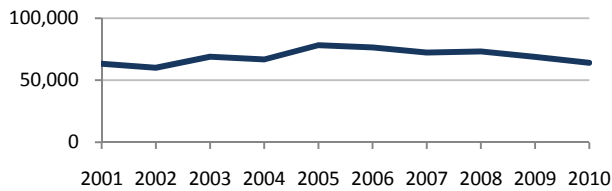
Overseas Market Share: 64,000 (2010); 3% of total visitation

Overseas Pleasure Travel Market Share: 42,200; 66% of the overseas visitor market (2010)

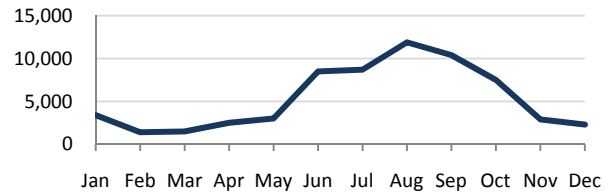
Ten-year Trend: Visitation is in slight decline after peaking in 2005. Activity from this market is influenced by economic and business conditions.

Visitation Charts

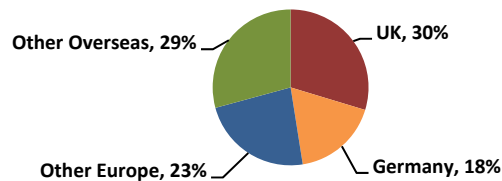
Overseas Visits to NS, 2001-2010



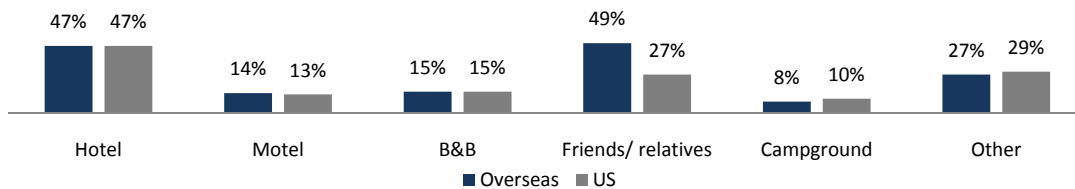
Monthly Visitation, 2010



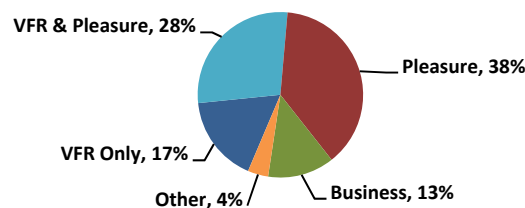
Overseas Visitor Markets, 2010



Overseas Visitors to NS Staying in Accommodations (%) compared to American Visitors, by Type



Reasons Overseas Visitors Come to Nova Scotia



Overseas Pleasure Travel Market

- 38% of overseas visitors come to NS for a pleasure vacation while another 28% combine their friend/family trip with a pleasure visit component.
- In general, pleasure visitors stay longer and spend more while on vacation compared to other segments. A typical overseas travel party spent an average of \$2,148 while in Nova Scotia, compared to \$2,547 spent by an overseas pleasure travel party, the highest per party spend from any other market.
- Overseas visitors enjoy: Hiking, coastal sightseeing, beach exploring, the Halifax waterfront, craft shops and studios, and museums and historic sites.
- Important factors in choosing NS as a vacation destination: the natural landscape and wildlife, the seacoast, the opportunity to visit friends/family, and the culture and people.
- Factors overseas visitors find satisfying about their Nova Scotia experience: the seacoast, the natural landscape and wildlife, the culture and people, the opportunity to visit friends/family, city and country experiences within easy reach, and the weather.

Trip Characteristics for Overseas Visitors (All and Pleasure) compared to US Visitors

Includes pleasure visitors and those combining Visiting Friends and Relatives (VFR) with pleasure

	Overseas (All Visitors)	US Visitors (All visitors)	Overseas Pleasure	US Pleasure
Party-size (people)	1.8	2.1	2.0	2.2
Length of stay (nights)	14.1	7	15.9	7.6
Travel party type	Couple, alone	Couples	Couples	Couples
Age	35-64 yrs	45-74 yrs	35-64 yrs	45-74 yrs
Spend (by party)	\$2,148	\$1,458	\$2,547	\$1,688

Trip Expenditures for Overseas Visitors (All and Pleasure) compared to Canadian and US Visitors, by travel party

Includes pleasure visitors and those combining visiting friends and relatives (VFR) with pleasure

	Overseas (All Visitors)	US Visitors (All visitors)	Overseas Pleasure	US Pleasure
Fixed-roof accommodations	\$513	\$489	\$518	\$550
Campgrounds	\$19	\$19	\$27	\$26
Meals in restaurants/hotels/bars	\$400	\$353	\$466	\$414
Groceries and liquor	\$179	\$98	\$213	\$115
Gas, oil and/or auto repair	\$165	\$130	\$207	\$160
Car rental fees, including insurance	\$328	\$136	\$398	\$145
Local transportation (taxis, limos, etc.)	\$23	\$8	\$22	\$7
Bridge/highway/ferry tolls in NS	\$4	\$5	\$5	\$6
NS cultural products	\$90	\$64	\$112	\$81
Clothing	\$136	\$34	\$134	\$36
Other shopping	\$203	\$44	\$207	\$51
Culture and entertainment	\$58	\$55	\$77	\$68
Sport and recreation	\$29	\$18	\$42	\$24
Parking	\$0	\$0	\$0	\$0
Total Expenditures	\$2,148	\$1,458	\$2,547	\$1,688

Activities & Travel Aspects Important to the Overseas Market

The below table includes pleasure visitors and those who combine their visit with friends or family with a pleasure component

	Overseas Visitors	American Visitors	Canadian Visitors
Outdoor Activities			
Hiking (wooded or coastal areas)	46%	43%	19%
Coastal sightseeing	41%	45%	24%
Beach exploring	33%	33%	22%
Places and Events			
Halifax waterfront	67%	56%	48%
Craft shops/studios	66%	52%	37%
Museums/historic sites	63%	57%	32%
Visit a nature park or fossil/geology site	47%	38%	16%
Important factors in decision to visit NS*			
The natural landscape and wildlife	80%	86%	59%
The seacoast	72%	86%	64%
The opportunity to visit friends/family	59%	34%	60%
The culture and people	52%	65%	51%
Your interests and hobbies	44%	48%	49%
The chance to do interesting things	41%	59%	53%
Factors with high satisfaction ratings*			
The seacoast	89%	89%	70%
The natural landscape and wildlife	86%	86%	67%
The culture and people	70%	77%	62%
The opportunity to visit friends/family	66%	38%	64%
City and country experiences within easy reach	61%	54%	56%
Weather	59%	65%	61%
The local Nova Scotian food	54%	58%	60%
Your Interests and hobbies	52%	62%	60%
The opportunity to rejuvenate	52%	66%	60%

* % rating of 8, 9 or 10 on a scale of 1-10 where 1 is not at all important and 10 is critically important

Other Important Factors about the Overseas Market

- 45% of overseas visitors consulted novascotia.com to gather information about, with the majority visiting the site after making the decision to visit.
- 12% of overseas visitors booked their NS vacation (at least in part) with a travel agent, the highest of any market, and were substantially more likely to pre-pay a portion of their trip expenses compared with visitors from other market regions
- American and overseas visitors were more likely than Canadian visitors to indicate their Nova Scotia trip exceeded their expectations
- Overseas visitors ranked Nova Scotia's value for money lower than visitors from other markets.
- 49% of overseas visitors made the decision to visit Nova Scotia at least five months prior to departure
- Almost two-thirds of overseas visitors used a laptop, GPS and/or a Smartphone to find travel information while in the province