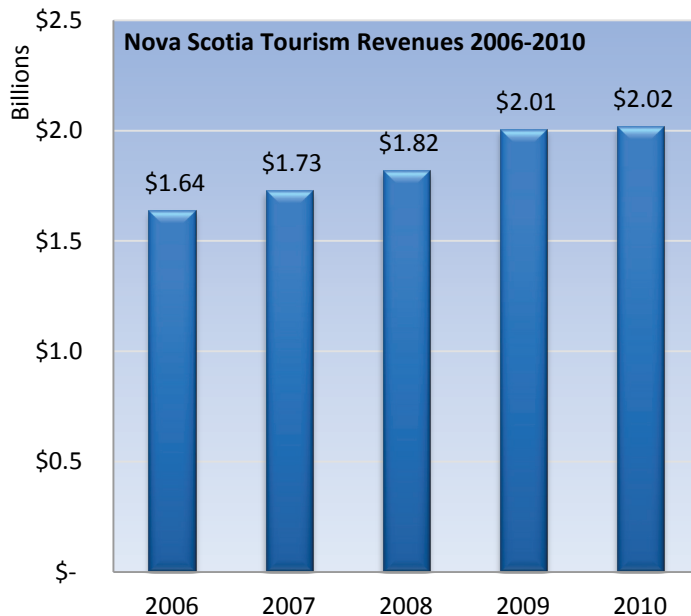


Tourism Industry Facts



How important is Nova Scotia's visitor economy?

Nova Scotia's visitor economy is valued at \$2 billion and contributes \$722 million to provincial gross domestic product, which accounts for two percent of all provincial economic activity. Tourism is a unique industry as it contains components of sectors that provide goods and services to visitors.

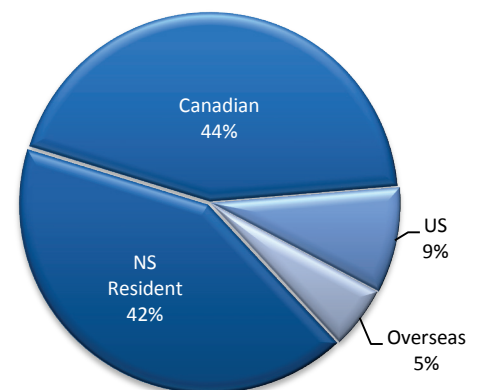
Nova Scotia uses modelling to establish the size of the visitor economy based on visitor expenditures. According to the province's updated Tourism Economic Impact Model, tourism plays a significant role in the Nova Scotian economy. The provincial visitor economy supports tens of thousands of jobs, both directly and indirectly, and generates millions in household income and tax dollars for Nova Scotians.

What was the economic contribution of tourism in 2010?

Tourism industry revenues totaled over \$2 billion in 2010. The visitor economy directly supported 24,000 jobs and \$531 million in household income. It also contributed tax revenues of \$78 million provincially and \$78 million federally in 2010. Municipal tax impacts attributable to tourism were estimated at \$24 million or 2.4% of all municipal taxes.

Visitors to Nova Scotia bring new money into the provincial economy. In 2010, out-of-province travellers generated almost \$1.2 billion in export dollars, more than half (58%) of all tourism revenues.

The Nova Scotia resident component of the visitor economy was \$840 million. Nova Scotians spent \$652 million travelling within Nova Scotia and contributed \$188 million when Nova Scotia travel was part of a larger trip out of province.



NS Tourism Revenues by Origin 2010

The Visitor Economy: A vital economic force for Nova Scotia – 2010 industry impact

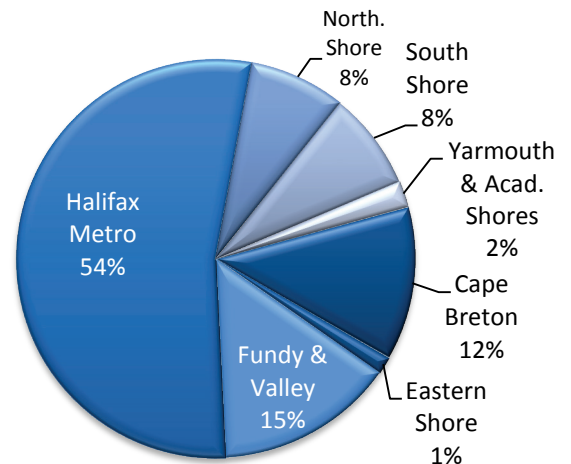
- Direct GDP: \$722 million
- 2% of Provincial GDP
- Direct Provincial Tax Revenues: \$78 million
- Total Provincial Tax Revenues: \$131 million
- Direct Federal Tax Revenues: \$78 million
- Total Federal Tax Revenues: \$130 million
- Direct Employment: 24,000 jobs
- Total Employment: 34,400 jobs
- Direct Household Income: \$531 million
- Total Household Income: \$892 million

What is the Tourism Economic Impact Model?

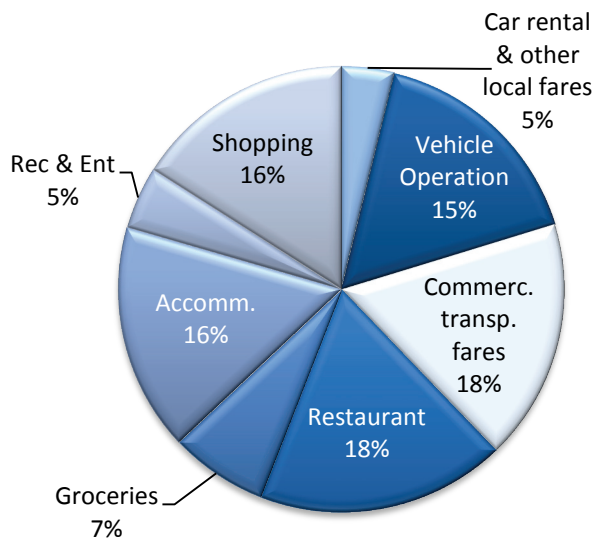
Measures and statements about the value of the visitor economy in Nova Scotia are supported by an economic impact model developed specifically for the province. Working with partners from across government and industry, the department developed an expanded and updated Tourism Economic Impact Model (TEIM) for Nova Scotia. The model calculates direct and spin-off economic impact estimates for gross domestic product, income, employment and taxes. TEIM also shows the distribution of economic impacts by region.

Regional Tourism Revenues

Region	2010 Tourism Revenues (millions)
Cape Breton	\$251
Eastern Shore	\$29
Fundy Shore & Annapolis Valley	\$293
Halifax Metro	\$1,084
Northumberland Shore	\$158
South Shore	\$161
Yarmouth & Acadian Shores	\$43
TOTAL	\$2,019



2010 Regional Tourism Revenues



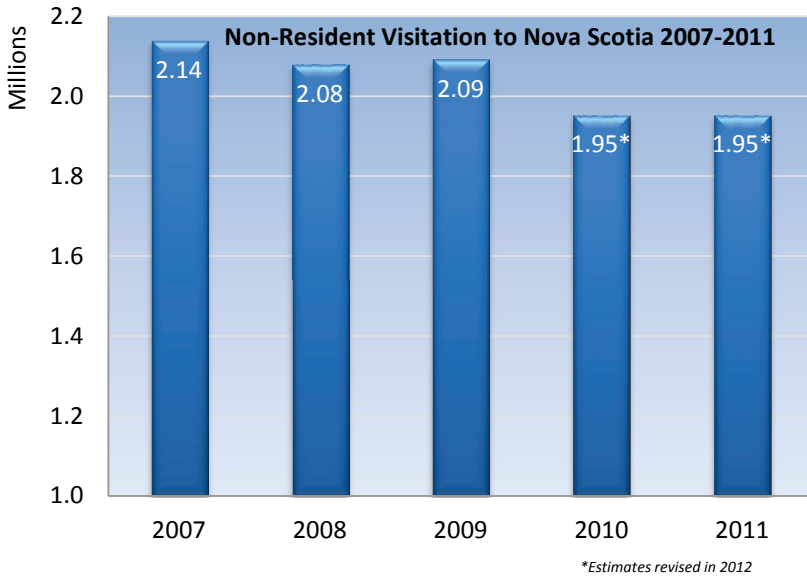
NS Revenues by Sector Type 2010

What businesses benefitted from tourism?

Tourist spending in Nova Scotia benefitted many sectors of the provincial economy in 2010. The largest contribution to visitor spending occurs in restaurants, where \$366 million is contributed to the economy. Transportation to Nova Scotia contributes \$354 million to tourist spending and \$332 million is spent on accommodations. Retail and grocery stores, recreation/entertainment venues and many other local businesses also benefit from the \$2 billion in revenue generated by the tourism industry.

Want to learn more about TEIM?

Contact: Karen McNutt, Sr. Research Analyst, Nova Scotia Economic and Rural Development and Tourism
Phone: (902) 424-6355 or **Email:** mcnuttk@gov.ns.ca

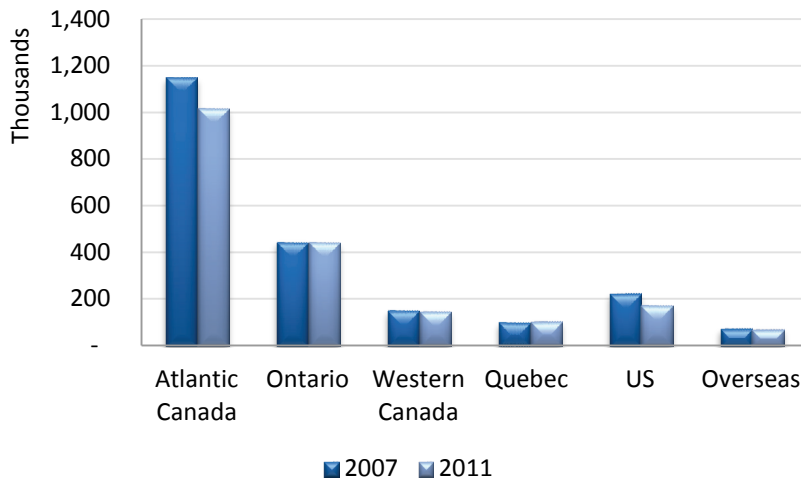


How many people chose Nova Scotia as a travel destination?

In 2011 overnight visits by non-residents to Nova Scotia totaled close to two million, which is on par when compared to 2010.

In province travel by residents of Nova Scotia remained stable at approximately two million overnight and almost five million same-day trips

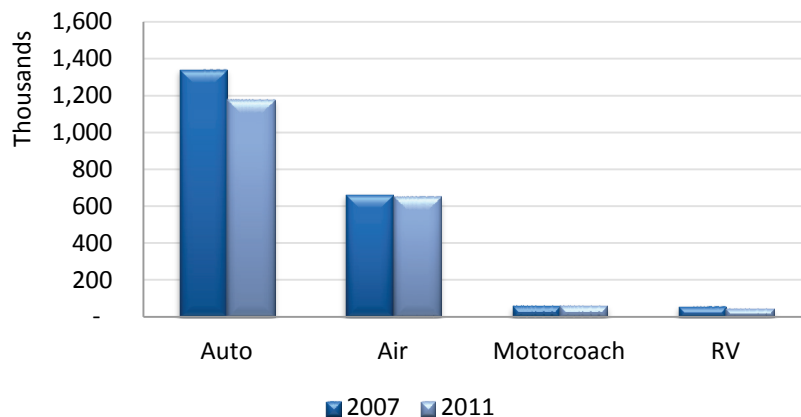
Visitation by Market, Nova Scotia: 2007 vs. 2011



Who visited Nova Scotia?

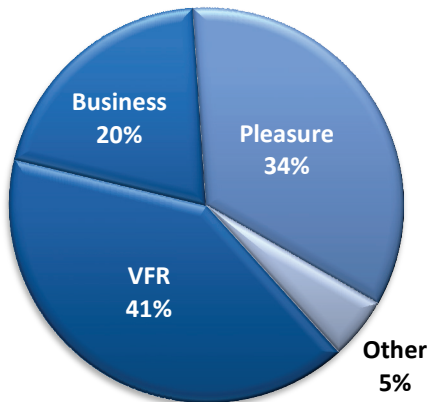
In 2011, the majority of visitors to Nova Scotia were from other areas of Atlantic Canada (52%). Travellers from Ontario comprised 23% of visitors, while those from other parts of Canada represented almost 13% (Quebec with five percent and Western Canada with eight). American and overseas visitors also made a significant contribution with nine and four percent respectively.

Visitation by Mode of Travel, Nova Scotia: 2007 vs. 2011



How did our overnight visitors get here?

Two-thirds (66%) of visitors to the province arrived by road, which includes travel by ferry. Of travellers to Nova Scotia, 61% arrived by automobile, two percent by recreational vehicle and three percent by motor coach. Over a third (34%) of our visitors arrived by air.

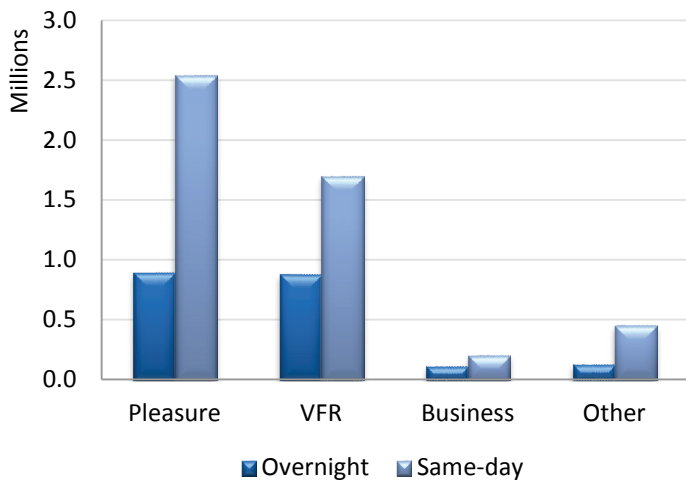


Visitation by Trip Purpose 2011

What attracted visitors to Nova Scotia?

In 2011, visitation to Nova Scotia totalled close to two million. According to the 2010 Visitor Exit Survey, visitors came to Nova Scotia for many reasons: to take a vacation, enjoy Nova Scotia’s natural beauty, visit friends and relatives, conduct business, attend conventions and take care of personal business. Visiting friends and relatives (VFR) (41%) was the number one reason given for coming to NS, while the second most common reason was for pleasure (34%).

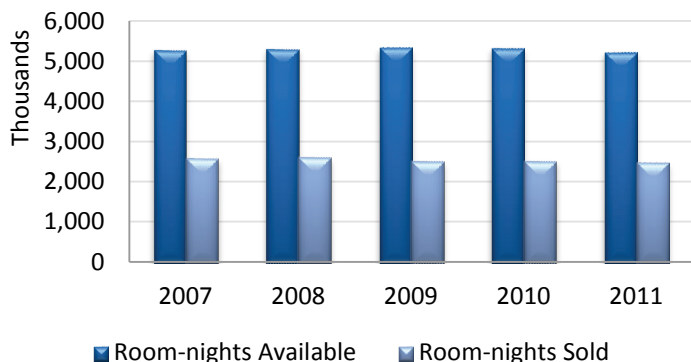
Resident Travel in Nova Scotia by Trip Purpose 2010



Why did Nova Scotians travel within the province?

According to Statistics Canada’s 2010 *Travel Survey of Residents of Canada*, Nova Scotians made 6.9 million in-province trips. Resident travel provided significant benefits for the tourism industry and the provincial economy. The money people spent travelling in-province supported local businesses and employment. These benefits would have been lost if another destination was chosen. The majority of Nova Scotians travelled within the province for pleasure or to visit friends and relatives. These reasons accounted for 88% of overnights trips by Nova Scotians within the province.

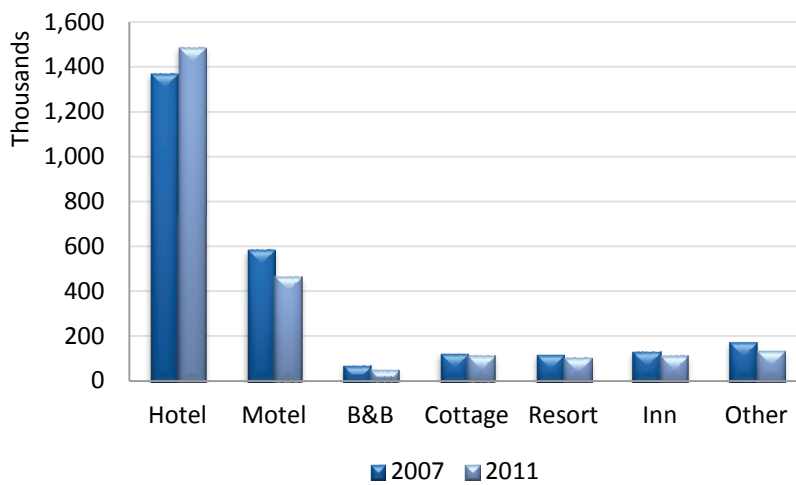
Room-nights Available vs. Sold, NS: 2007-2011



How did fixed-roof accommodation supply compare to demand?

Between 2007 and 2011, the number of fixed roof room-nights sold in licensed accommodations decreased four percent, while the number of room-nights available in the province declined one percent. Demand for accommodations has been declining over the past five years while supply increased in all but the last two years.

NS Room-nights Sold by Accommodation Type 2007 vs. 2011



Where did visitors stay?

Nova Scotia offered a variety of fixed-roof accommodations to visitors in 2011. Hotels (60%) and motels (19%) represented the most commonly used accommodation types.

Since 2007, hotels experienced an eight percent growth in demand. Over the past five years, bed and breakfasts (-29%) reported the largest declines in demand followed by motels (-20%), other accommodation types (-21%), inns (-13%) and resorts (-12%).

Need more information?

Visit: <http://www.gov.ns.ca/econ/tourism/research/> or **Contact:** Joliene Stockley, Research Analyst, Nova Scotia Economic and Rural Development and Tourism **Phone:** (902) 424-1166 or **Email:** stockljl@gov.ns.ca