
2004 Nova Scotia Visitor Exit Study

Final Report

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**Nova Scotia Department of Tourism,
Culture and Heritage**

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Introduction

This report presents the results of the **2004 Nova Scotia Visitor Exit Study**, as prepared by Corporate Research Associates Inc., on behalf of the Nova Scotia Department of Tourism, Culture & Heritage. The Nova Scotia Visitor Exit Survey had two primary objectives:

- To update key tourism statistics used to calculate industry activity. For example, the survey measured both party size and average expenditures, which are key indicators associated with Nova Scotia's tourism industry; and
- To provide trip and visitor profile information. For example, the survey collected data related to visitors' trip purpose, activities visitors participated in while visiting the province, and identification of positive and negative aspects of visitors' experiences in the province.

A total of 4,289 interviews were conducted with overnight visitors from June 24 to November 21, 2004. Interviews were conducted face-to-face at the Halifax International Airport, and the Caribou, North Sydney, Digby and Yarmouth ferry exits. In addition, travellers passing through the Cobequid Toll Plaza and exiting the province through Amherst/Tidnish were provided business reply cards containing information on how to complete the exit survey via the Internet or telephone. While the 2004 Nova Scotia Tourism Visitor Exit Survey collected information on same-day and overnight visitors to the province, this report focused exclusively on overnight visitors.

The following appendices are included at the end of the report.

Appendix A	Data Tables
Appendix B	Traffic Flow Maps

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Executive Summary

Non-resident visitation to Nova Scotia rebounded in 2004, with Atlantic Canadians representing the majority of the visitors. Amherst continues to be the most frequently utilized entry point into the province, with the Halifax International Airport ranking second in this regard.

The average visitor party to Nova Scotia consisted of 2.2 individuals, unchanged since 2000. Of interest, the number of visits by families declined slightly in 2004, while travel by couples is up over the comparable measure from 2000. Perhaps reflecting an aging North American population, visitors to Nova Scotia skewed slightly older in 2004 than they did in 2000, with most visitors to the province in 2004 more than 44 years of age.

The length of stay in the province averaged 6.5 nights in 2004, unchanged from 2000. While Overseas visitors and Canadians from Manitoba westward (including the Territories) averaged over 10 nights in the province, Atlantic Canadian residents took trips of considerably shorter length.

Overall, visitor expenditures in the province remained steady at \$947 per party. Taking party size and length of stay into account, visitors to Nova Scotia spent approximately \$67 per person per day during their visit. Over one-half of all expenditures went to cover costs of fixed roof accommodations, and meals and beverages in restaurants, although these figures varied by trip purpose, mode of travel, and market region. Total expenditures were highest among visitors residing in the United States outside of New England, and among Canadian visitors from points west of Ontario, and lowest among visitors from Atlantic Canada.

Among visitors travelling to Nova Scotia from outside the Atlantic region, results from 2004 indicate an increase in the overall number of visits for general pleasure, as opposed to visiting friends and relatives, or business trips. Close to one-half of visitors from outside the Atlantic region indicated they visited the province for pleasure or recreation, with the key reason for choosing Nova Scotia being its scenery or sightseeing. In contrast, the number travelling to the province to visit family or friends declined in 2004, with three in ten in the province for this purpose.

For the majority of visitors in 2004, this was not the first time they had been to Nova Scotia, and this was especially true for Canadian visitors. The Halifax waterfront is the most top of mind association with Nova Scotia, and indeed, close to six in ten visitors confirmed they had been to the Halifax waterfront on their trip, while areas such as Peggy's Cove and Lunenburg/Mahone Bay were visited by nearly one-quarter of visitors. Of note, the Cabot Trail was top of mind among one-quarter of visitors to the province, and was visited by one-fifth of visitors. The most attended event by visitors in 2004 was Tall Ships 2004, followed by the Congr s Mondial Acadien.

The top two activities among visitors while in Nova Scotia were leisure walking and visiting craft shops, with over one-half of visitors participating in these activities. Of interest, visitors to the province enjoyed the general scenery and sightseeing opportunities offered by the province the most. In terms of improvements, visitors were most critical of the province's roads and highways. Awareness of Nova Scotia tourism advertising experienced little change since 2000, with six in ten visitors reporting someone in their party had heard or seen advertising promoting Nova Scotia prior to their trip. Among those who recalled such advertising, television was cited as the primary source. Finally, Nova Scotia Visitor Information Centres attracted four in ten visitors, with



one-quarter of travellers visiting a VIC/tourist bureau when they first entered the province on their trip.

Overall then, the 2004 Visitor Exit Survey reveals a pattern of results that are relatively stable with respect to those reported in 2000. Measures such as party size, length of stay and per party expenditures were on par with 2000 figures, although there were shifts in terms of trip purpose and party composition.

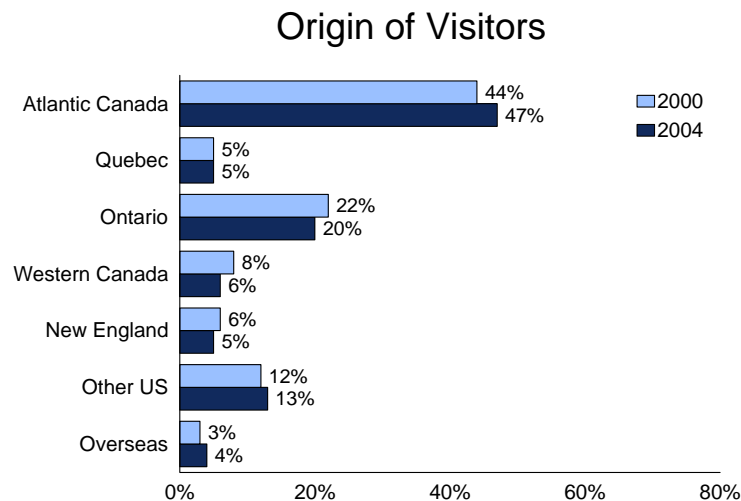


Detailed Analysis

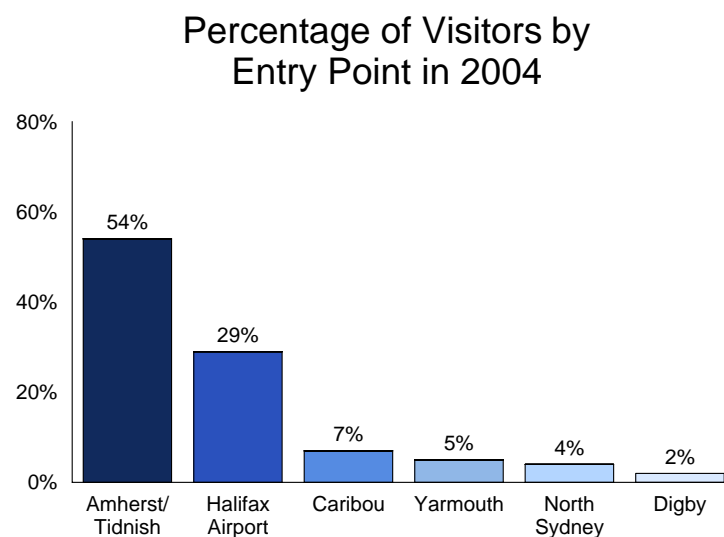
The following results are based on a detailed analysis of visitors to the province interviewed between June and November 2004.

Overview of All Visitors

Atlantic Canadians continued to make up the largest group of visitors to Nova Scotia in 2004, while visitation from the other market regions was substantially less. Results were largely consistent with those from 2000.



Amherst/Tidnish remained the most heavily used entry point to Nova Scotia, while the Halifax International Airport was also utilized by a significant percentage of travellers.



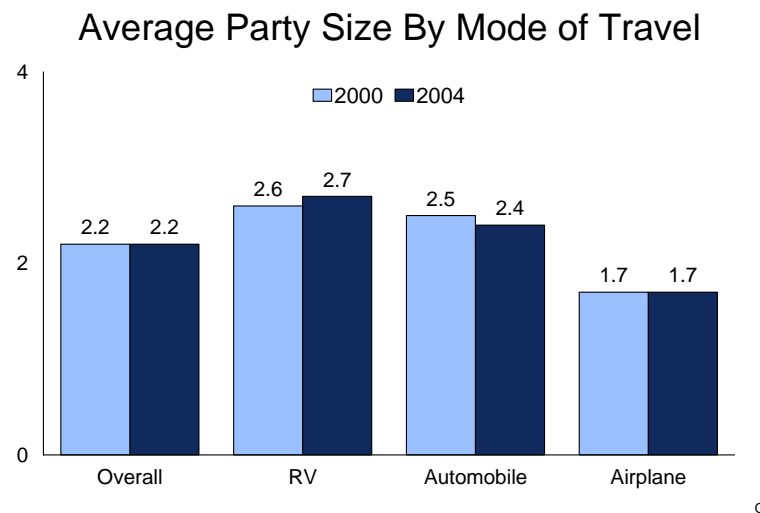
Party and Trip Characteristics

This section focuses on travel party characteristics, and discusses results that pertain to the party as a whole as opposed to the individual visitor.

Party Characteristics

Average Party Size

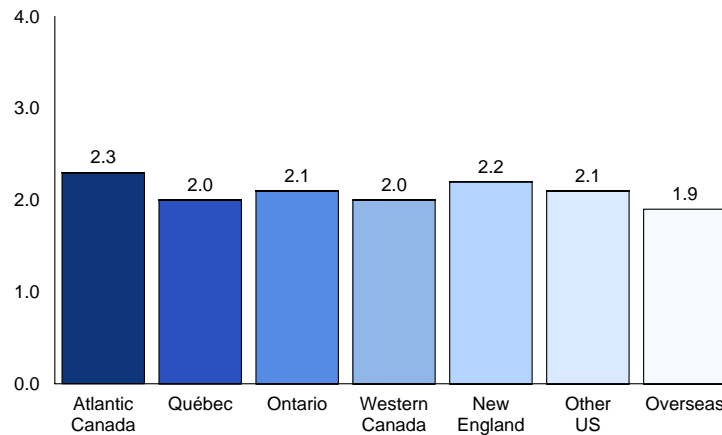
Overall, there was no change in average party size since 2000. Results by mode of travel were consistent with 2000 figures; parties visiting the province by RV tended to be larger than those arriving via automobile or air. Given the differences in traveller profiles, it is not surprising the average party size among airplane visitors was considerably lower than that of automobile or RV travellers. (Table 1)



Visitors travelling from Atlantic Canada tended to have slightly larger party sizes than visitors from other regions. Results on this measure were largely consistent with those from 2000 across all market regions. Moreover, pleasure travellers averaged 2.5 people per party, while those in the province on business had an average party size of 1.4 individuals.



Average Party Size by Market Region

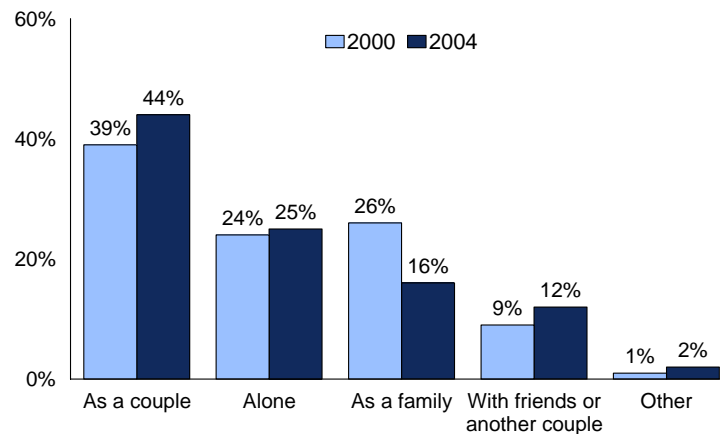


Q1

Party Composition

An increase in couples visiting the province was evident in 2004. However, the number of those visiting as families declined substantially since 2000, down 10 percentage points. Results clearly indicated that mode of travel was related to party composition. In fact, those who travelled to the province by car or RV were more likely to be couples, while air visitors were more likely to have travelled to the province alone. (Table 12)

Party Composition



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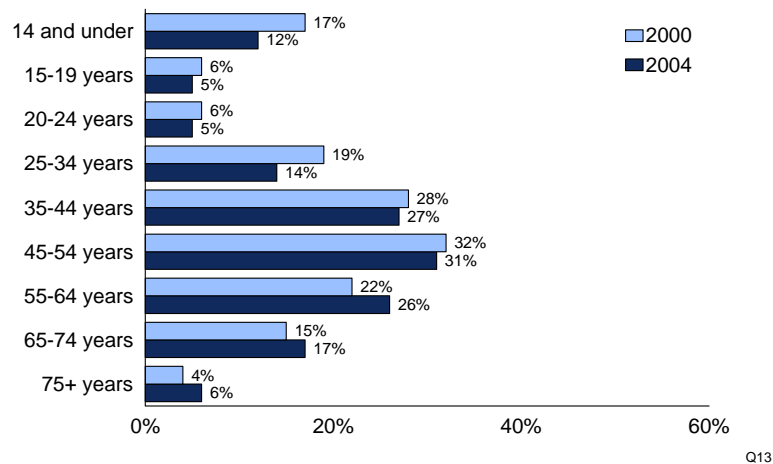
Results across the market regions were comparable to the overall results, with the exception of the United States markets. In fact, more than one-half of visitors from New England and Other US (consists of areas outside of New England) markets travelled to Nova Scotia as a couple, whereas approximately two in five from each of the other regions visited as a couple.



Age

Overall, parties who visited Nova Scotia in 2004 had an older age profile compared with those in 2000. Parties who arrived in the province by RV were generally older than those who came to the province by car or airplane. In fact, 40 percent of RV parties had a member aged 55 to 64, considerably higher than the 25 percent and 26 percent who travelled by automobile and airplane respectively. Moreover, three in ten RV travellers had someone in their party aged 65 to 74, while just 17 percent of car travellers and 15 percent of those who travelled by air reported the same. Consistent with the higher proportion of air travellers who visited alone, this group was the least likely to have a member of their party 14 years old or under (6%). (Table 13)

Age Groups Represented Within Party



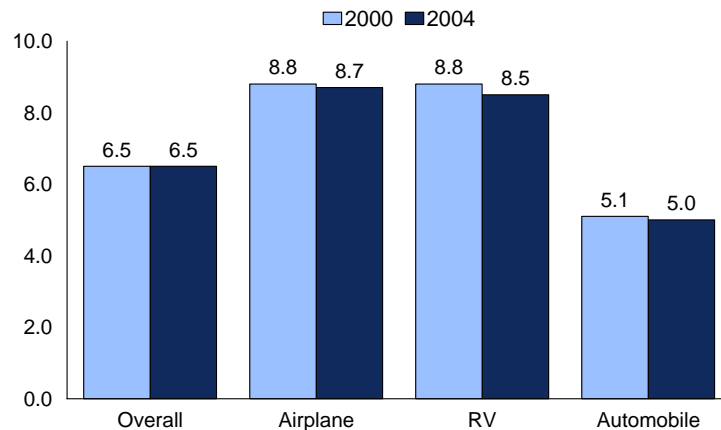
Trip Characteristics

Length of Stay

Overall results indicated visitors to the province did not increase the number of nights they spent in Nova Scotia. Parties who arrived by RV or airplane spent considerably more time in the province than those who travelled by automobile. Since 2000, however, RV parties decreased the number of nights they spent in Nova Scotia, while both automobile and airplane parties showed little change. RV/Automobile travellers from Atlantic Canada (average = 3.8 nights) spent the least amount of time in Nova Scotia, while road travellers from outside Atlantic Canada spent no less than 4.2 nights in Nova Scotia, with parties from Other US (8.1 nights) and Ontario (7.8 nights) staying the longest. (Table 7)



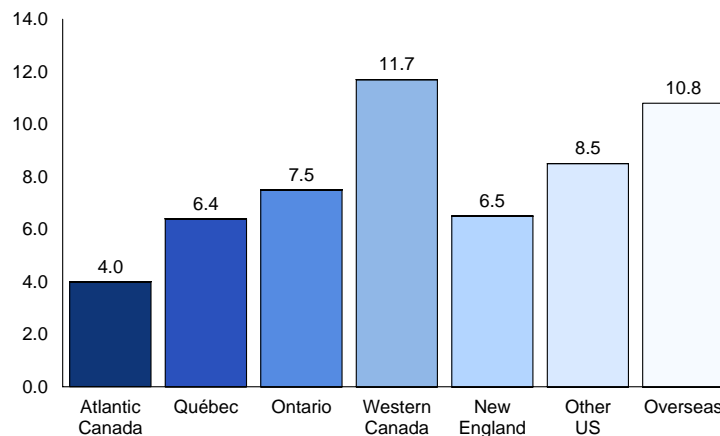
Average Number of Nights in Nova Scotia by Mode of Travel



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Most likely due to the distance from the province, visitors from Western Canada (consists of Manitoba westward including the Territories) and Overseas regions spent the longest time in the province. Atlantic Canadian visitors took substantially shorter trips. Again, while there were marginal differences, length of stay was relatively consistent with results recorded in 2000.

Average Number of Nights in Nova Scotia by Market Region

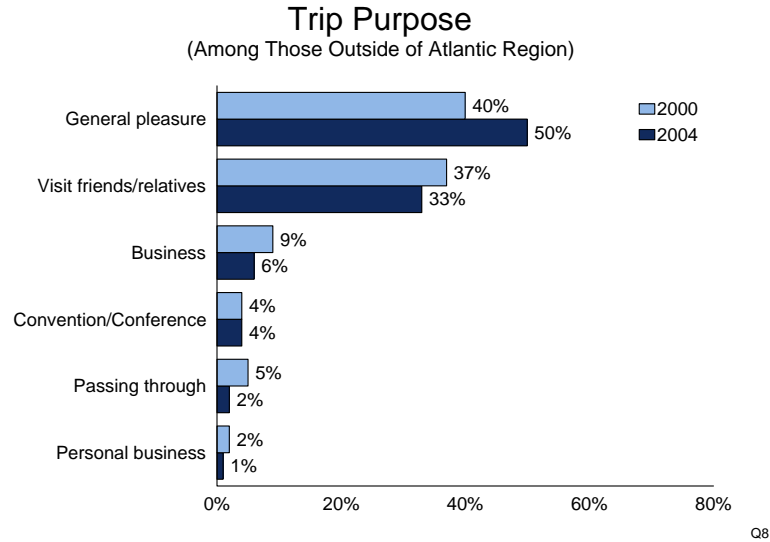


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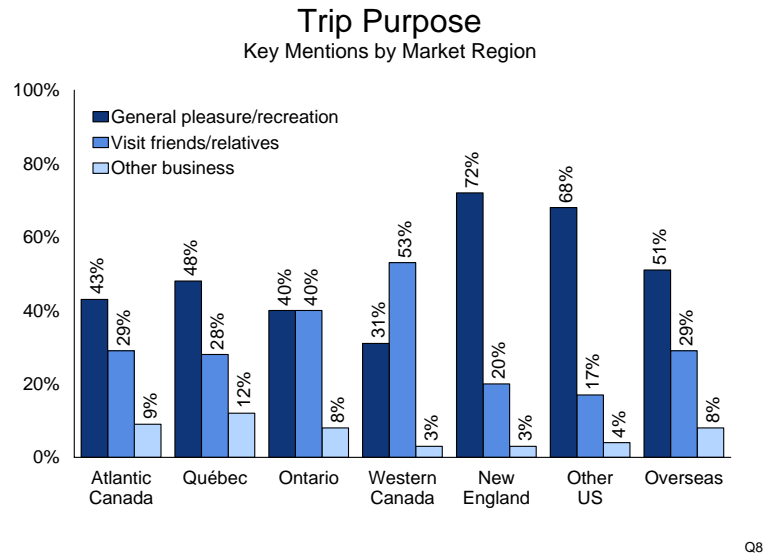
Trip Purpose

In 2004, visitors to Nova Scotia from outside of the Atlantic region mainly travelled to the province for recreational or general pleasure purposes. It is noteworthy that since 2000, the number who visited the province for this reason appears to be on the rise. While a considerable proportion of 2004 visitors from outside the region also came to the province to visit family or friends, results indicated fewer visiting for this reason compared to 2000. (Table 8)





Visitors from the United States and Overseas regions were most likely to have visited the province for general pleasure or recreation. By contrast, visitors from Western Canada were most likely to come to the province to visit friends or family. The pattern of results for trip purpose was similar to that found in 2000 for most market regions. Of note, however, 2004 results for Atlantic Canada in particular, and to some extent Ontario and Overseas as well, skew more towards general pleasure and recreation visitors.



Combining Business With Pleasure

In 2004, one in five business travellers spent extra time in Nova Scotia to visit the local area, relatively unchanged since 2000. There were some notable differences between business travellers from the various market regions. Perhaps related to the distance travelled to get to Nova Scotia, business travellers from Western Canada and Overseas destinations were substantially more likely than those from other areas to have extended their business trip. In fact, nearly six in ten (57%) from Western Canada extended their visit to the province and two in five Overseas business



travellers added extra time to their visit. Comparatively, no more than one-quarter of business travellers from other market regions lengthened their stay in Nova Scotia. Consistent with overall results, Western Canada (53%) and Overseas (40%) air business travellers were most likely to have extended their stay in the province. (Table 9a)

The average extension was 6.9 nights among business travellers who spent extra time in Nova Scotia. Overseas business travellers who extended their stay averaged 3.5 nights, while Western Canada business travellers who combined business with pleasure stayed in the province an extra 7.2 nights, on average. (Table 9b)

Business travellers in 2004 were more likely than in 2000 to have brought other family members along on their trip. Indeed, 24 percent of business travellers brought someone not specifically involved in their business trip with them, up 6 percentage points over 2000. Mode of travel was strongly related to whether or not business travellers brought along other family members. As an example, 36 percent of business travellers who arrived by automobile indicated non-business individuals had made the trip with them, while 65 percent of RV business travellers claimed the same. By contrast, just 8 percent of air business travellers had a non-business individual accompany them. Undoubtedly, the additional cost of air travel played a vital role in business travellers' decision to take other individuals along on their trip. (Table 10)

Trip Expenditures

Overall, total expenditures in 2004 were virtually unchanged compared to those estimated in 2000. As is typically the case, pleasure travellers spent the most, while those here on business or to visit friends and relatives (VFR) spent considerably less. It should be noted that while total party expenditures among pleasure and business travellers declined compared with 2000 results, those for VFR travellers showed a slight increase. (Table 15)

2004 Average Expenditures Per Party*				
Type of Expenditures	Overall	Business	Pleasure	VFR
Fixed roof accommodations	\$288	\$324	\$403	\$126
Campground fees	\$13	\$1	\$23	\$4
Restaurants	\$242	\$175	\$315	\$174
Auto – repairs/gas/oil	\$98	\$48	\$134	\$74
Taxi/car rental	\$72	\$85	\$77	\$67
Groceries/liquor	\$63	\$21	\$74	\$69
NS handcrafted products	\$48	\$21	\$60	\$41
Clothing purchases	\$47	\$40	\$45	\$55
Other shopping	\$22	\$14	\$16	\$24
Recreation & entertainment	\$48	\$20	\$65	\$37
Other	\$7	\$1	\$6	\$6
Total expenditures per party	\$947	\$750	\$1,218	\$677



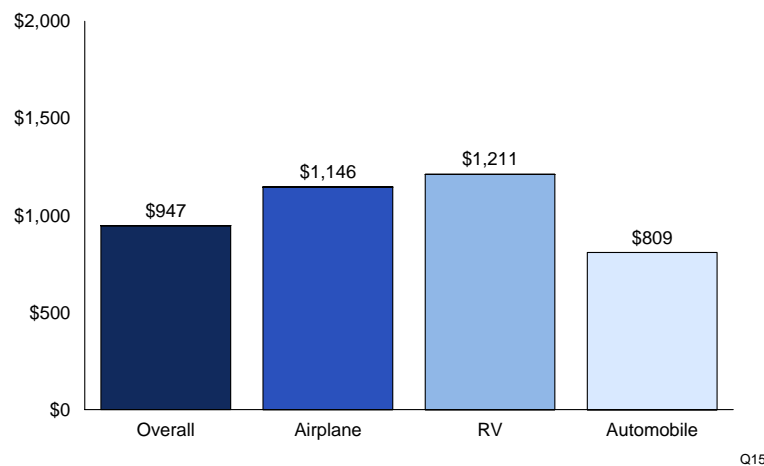
*Note: Package expenditures have been included in the calculation of trip expenditures. Total expenditures include all types of expenditures exclusive of ferry/air fares. Column totals may not add up exactly due to rounding.

Outside of ferry and air fares, which for the most part do not benefit Nova Scotia's economy directly, parties spent the most on fixed roof accommodations, and meals and beverages in restaurants, with these expenditures accounting for over one-half of total expenditures. No other single expenditure category accounted for more than \$100 per party, overall. On average, Other US visitors spent the most of any market region on fixed roof accommodations (\$554) and restaurants (\$406), while Atlantic Canadians spent the least (\$158 on fixed roof accommodations and \$146 on restaurants).

On average, the highest total expenditures were by Other US visitors followed closely by visitors from Western Canada and Overseas. Once again, Atlantic Canadian visitors spent the least. Compared with the 2000 Visitor Exit results, expenditures in 2004 were consistent across most market regions, with the exception of Atlantic Canada and Overseas. Specifically, spending among Atlantic Canadians (\$559) was higher in 2004, while spending among Overseas (\$1,303) visitors (the smallest segment) was down significantly.

Among the various modes of travel, average party expenditures were highest among parties travelling by RV and air, with automobile travellers spending considerably less. Air travellers spent a greater proportion of their expenditures on fixed roof accommodations and taxis/car rentals, while RV spent significantly more on campgrounds, vehicle costs (e.g., repairs, gas, oil), and groceries/liquor.

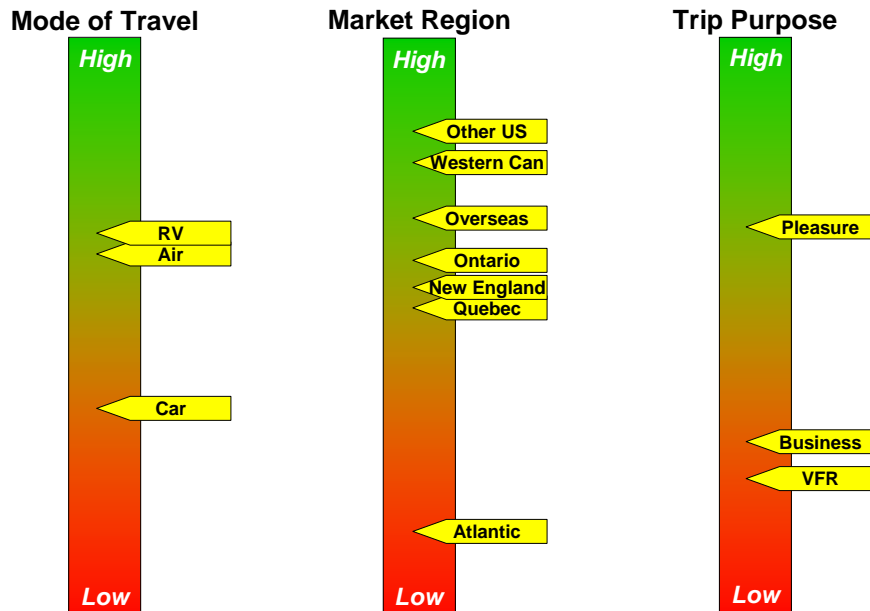
Total Party Expenditures
(Average, by Mode of Travel)



For ease of comparison across key subgroups, total party expenditures were indexed against the average party expenditures among all visitors. The following graph illustrates the position on the expenditure index by mode of travel, market region, and trip purpose. As is evident in the graph, visitors from Other US and Western Canada were the highest spending visitors. In contrast, those travelling by car, those from Atlantic Canada, and those in Nova Scotia on business or to visit friends and relatives spent considerably less than other groups of travellers.



Indexed Party Expenditures by Key Visitor Subgroups



Expenditures vary across the key subgroups, in many cases because of differences in party size and length of stay. To control for these factors, it is possible to calculate expenditures per person per day. On average, each non-resident visitor to the province spent approximately \$67 per day during their trip in 2004. Per person daily spending was highest among air visitors (\$77), business travellers (\$95), pleasure travellers (\$81), and those from Other US (\$86) and Quebec (\$79) regions. In contrast, per person daily expenditures were lowest among those travelling in RVs (\$52), and those visiting friends and relatives (\$42). It is also worth noting that daily spending was strongly tied to household income, with those in the \$80,001 or more income bracket (\$88) spending nearly twice as much per person per day as those in the \$40,000 or less income bracket (\$45).

Estimated Expenditures Per Person Per Day (by key visitor subgroups)					
Mode of Travel		Market Region		Trip Purpose	
Air	\$77	Other US	\$86	Business	\$95
Car	\$67	Quebec	\$79	Pleasure	\$81
RV	\$52	New England	\$74	VFR	\$42
		Ontario	\$69		
		Overseas	\$63		
		Western Canada	\$61		
		Atlantic Canada	\$60		



Travel Agent/Company Pre-Paid Expenses

As in 2000, the current Visitor Exit Survey included a series of questions regarding pre-paid travel expenses. Please note that prepaid travel costs, where applicable, were incorporated into calculations of overall trip expenditures. More specifically, a portion of the amount prepaid to a travel agent was added to the amount spent in Nova Scotia over and above that included in the travel package. Calculation of the portion of prepaid expenses to add to overall expenditures assumed a fixed margin (30%) that went directly to the travel agent, flight/ferry costs based on market region and entry point, as well as which expenditure categories were covered by the package.

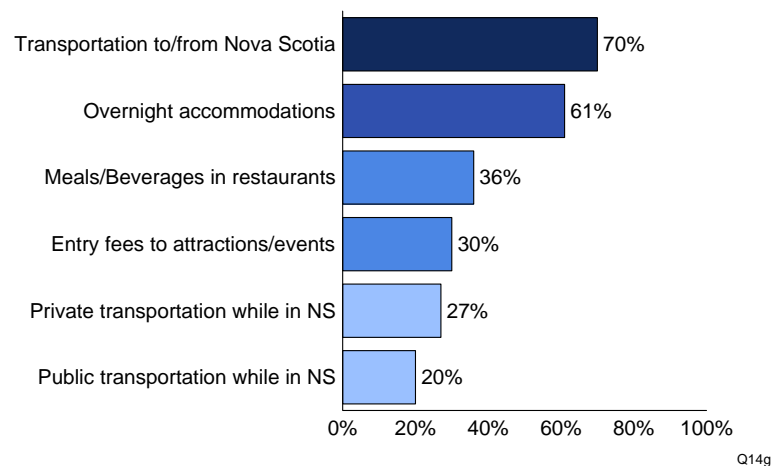
The practice of pre-paying a portion of travel expenses was not popular among visitors in 2004. In fact, just 6 percent claim they paid a portion of their trip expenses prior to arriving in the province, relatively unchanged since 2000. One notable difference between market regions is clear. Overseas visitors (16%) and Other US visitors (16%) were more likely to pre-pay a portion of their trip expenses than visitors from other market regions. (Table 14a)

Travel Package Characteristics

Among travellers who prepaid, six in ten (63%) say their expenses covered only Nova Scotia travel expenses, mostly unchanged since 2000. An average of five nights in Nova Scotia were covered by travel packages, but a slightly higher number (5.5 average) of nights in other destinations were covered. (Tables 14e, 14f, and 14h)

Consistent with 2000 results, transportation to and from Nova Scotia was the most popular travel package component. Additionally, three in five included overnight accommodations in their package, while a substantially lower number included private transportation, meal expenses, or attraction fees. (Table 14g)

Travel Package Components



Accommodations

The following table illustrates the percentage of all parties visiting Nova Scotia in 2004 who stayed at least one night in each of the accommodations listed, and the average number of nights spent in each type of accommodation. (Table 16)

Type of Accommodation	Overall	Business	Pleasure	Visit Friends/ Relatives
Friends/Relatives				
% Visited	36%	11%	20%	75%
#Nights	7.3	4.0	4.9	8.9
Hotel				
% Visited	40%	67%	45%	20%
#Nights	2.9	3.5	2.9	2.5
Motel				
% Visited	17%	11%	23%	7%
#Nights	2.7	2.4	2.7	3.1
Bed & Breakfast				
% Visited	11%	5%	17%	5%
#Nights	3.3	2.7	3.6	2.6
Other Fixed Roof				
% Visited	14%	3%	23%	6%
#Nights	7.2	9.3	6.4	6.5
Campgrounds				
% Visited	8%	1%	14%	2%
#Nights	5.3	7.0	5.4	5.2

As the table above clearly indicates, visitors mainly stayed in hotels or homes of friends or relatives during their visit to Nova Scotia, although the average number of nights spent in hotels was considerably less than the length of time spent at the homes of friends or relatives. Business travellers were far more likely to have stayed in a hotel as opposed to staying with friends or relatives (or other types of accommodations). Those travelling for pleasure stayed in a variety of different accommodation types, most notably hotels, motels, and other fixed roof accommodations.

Visitors from Ontario (46%) and Western Canada (49%) were more likely than other visitors to have stayed with family or friends. Moreover, equal proportions of Atlantic Canadian visitors stayed in hotels (37%) or with friends or family (37%). Visitors from the other regions were more likely to have paid for accommodations.

Looking at mode of travel, RV travellers were less likely than other visitors to have used accommodations other than privately operated campgrounds/trailer parks (51%) or national/provincial campgrounds (18%). Air visitors were more likely than those travelling by automobile to have stayed at a hotel (47% vs. 38%), bed and breakfast (13% vs. 10%) or with friends or family (42% vs. 34%), while automobile travellers were more likely than air travellers to have stayed at a motel (22% vs. 9%).

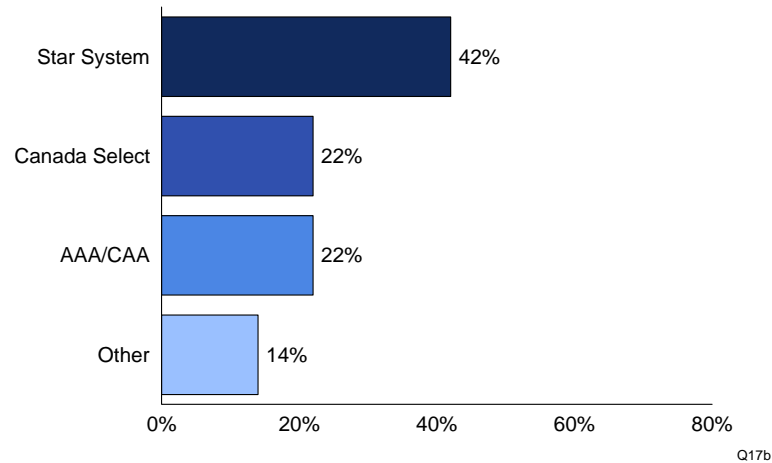
Consistent with 2000 results, visitors to the province spent the largest number of nights when staying at a private cottage or vacation home (17.5), with friends or family (7.3), or at



campgrounds (8.7). No more than an average of 5.3 nights were spent at other accommodation types. (Table 16)

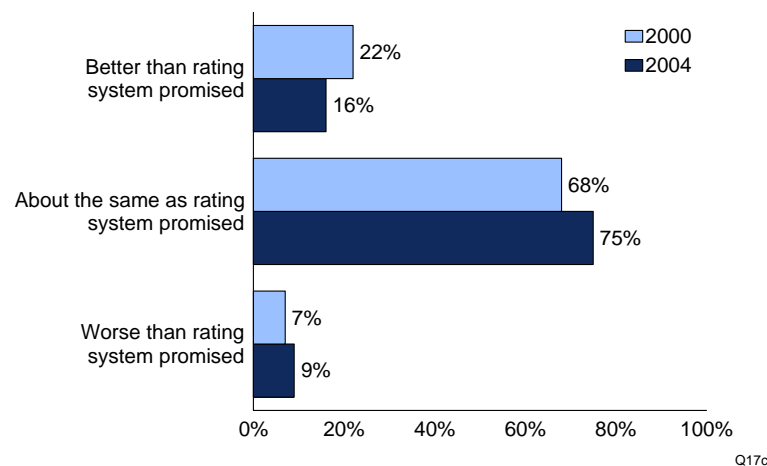
The vast majority (87%) of visitors who stayed in commercial accommodations did not use a rating system to help them select their accommodations in the province. Among visitors who did use a rating system, equal proportions named Canada Select or AAA/CAA. Another four in ten simply mentioned they used a star system, but did not specify which system they used. (Tables 17a, 17b)

Rating System Used



Those who used a rating system found it to be an accurate information source. A strong majority agreed their accommodations were about the same as the rating system had led them to expect, while one in six believed their accommodations were better than expected. (Table 17c)

Rating of Accommodations

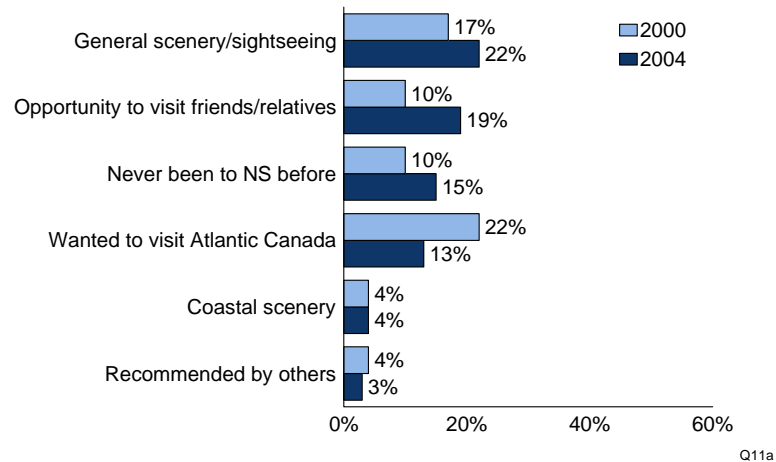


Pleasure Travellers

Motivations for Pleasure Travellers

Among all parties visiting Nova Scotia, 44 percent indicated they were travelling to the province for general pleasure or recreation. Those travelling to Nova Scotia for general pleasure or recreation offered four primary reasons for choosing Nova Scotia as their destination: general scenery/sightseeing, an opportunity to visit friends or relatives, or because they had never been to Nova Scotia before or they wanted to visit Atlantic Canada. (Table 11a)

Main Reason Why Pleasure Travellers Chose Nova Scotia



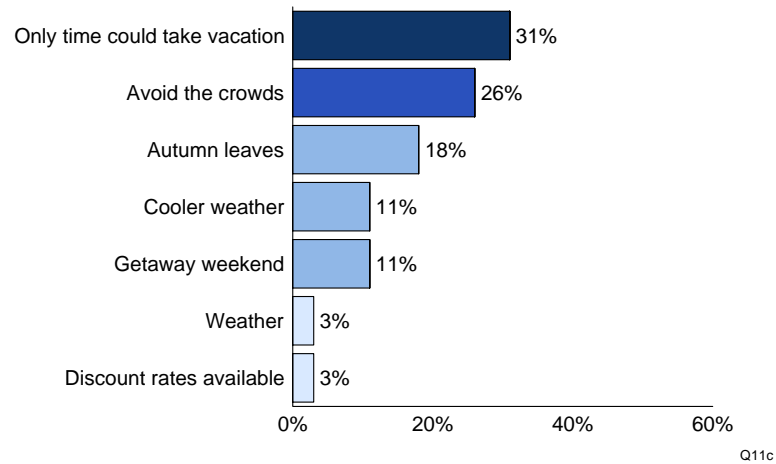
Overseas visitors (31%), US visitors (23% New England, 23% Other US) and Western Canada visitors (27%) were more likely than Atlantic Canadian visitors (2%), Ontario visitors (14%), and Quebec visitors (10%) to have stated they decided to visit Nova Scotia because they wanted to visit Atlantic Canada. Atlantic Canadians (32%) were substantially more likely than other visitors to indicate they chose Nova Scotia because, even though the main purpose of their trip was for general pleasure and recreation, it offered them an opportunity to visit friends or relatives.

Fall Visitors

Pleasure visitors who came to the province in the fall (September or October) did not appear to be primarily motivated by the discounted rates offered during this time of year. The most popular reason for coming to Nova Scotia during this period was due to the fact it was the only time available for a vacation. One-quarter specifically came to the province during the fall season because they wanted to avoid the crowds. Other common reasons included cooler weather, autumn leaves, or a getaway weekend. (Table 11c)



Why Visit Nova Scotia in the Fall



Atlantic Canadians (23%) were much more likely than those outside the region to have visited Nova Scotia during the fall for a getaway weekend, while visitors from Quebec (20%), Ontario (14%), and United States (17% New England, 19% Other US) were more likely to have been attracted to the province during this time because of the cooler weather.

Visitor Characteristics

This section moves away from party information and focuses on the individual visitor to Nova Scotia. Visitors who were 15 years of age or more were randomly selected from within each party group to complete the remainder of the questionnaire. This section examines participation in activities, perceptions, and awareness of the province as a vacation destination, and repeat visits to the province among visitors.

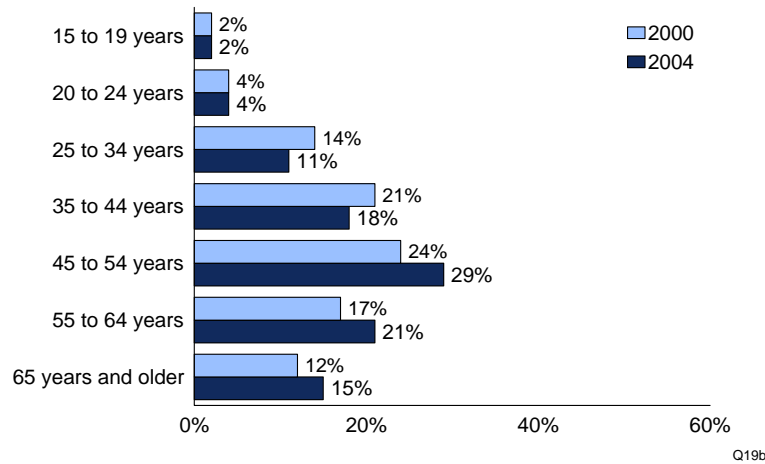
Visitor Characteristics

Age

Only a small percentage of visitors were between the ages of 15 and 24 years, with most being between 45 and 64 years of age. Just over one in ten were aged 65 years or older. Generally speaking, 2004 visitors to Nova Scotia had an older profile than visitors who came to the province in 2000. (Table 19b)



Age



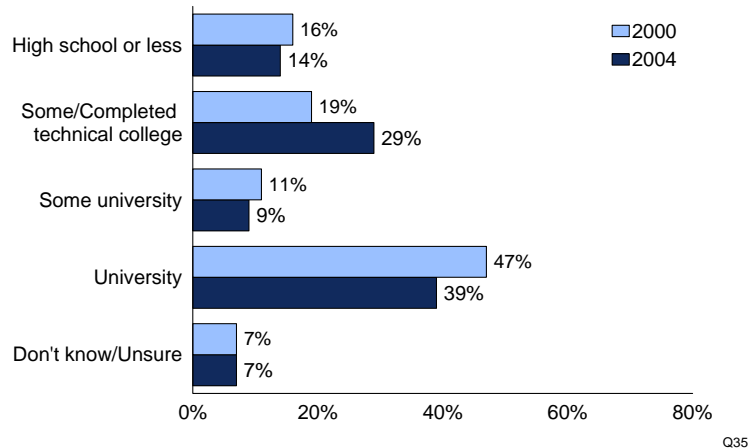
A closer look at mode of travel reveals that RV visitors (52%) were much more likely than automobile (34%) or air (38%) visitors to be 55 years of age and older.

Visitors from the United States tended to be older than visitors from other regions. Specifically, 49 percent of New England visitors were over the age of 54, while 59 percent from states outside New England were over the age of 54. In contrast, no more than 37 percent of visitors from the other regions fell into this older age category.

Education

Overall, most visitors to Nova Scotia have someone in their home who has a university degree. Among the market regions there were some notable differences. Visitors from New England (56%) and Other US (52%) were more likely to have someone in their household with a university degree. Visitors from Atlantic Canada (33%) and Western Canada (30%) were considerably less likely to have a household member with a university degree. (Table 35)

Highest Level of Education in Household in Visiting Party



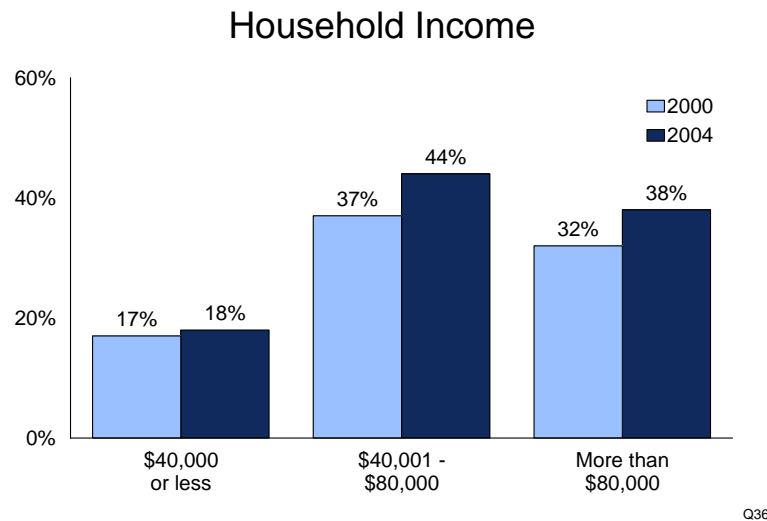
Business travellers (50%) were more likely than those travelling for pleasure (40%) or visiting



friends or relatives (34%) to have a household member who has completed a university degree.

Household Income

The majority of visitors reported household incomes of more than \$40,000, with close to four in ten reporting household incomes of more than \$80,000. Business travellers (52%) and those travelling for pleasure (42%) were more likely to have household incomes in excess of \$80,000, while those visiting friends or relatives were significantly less likely (28%). Visitors from Atlantic Canada (29%) were also less likely than other visitors to have household incomes in excess of \$80,000. (Table 36)



Previous Trips to Nova Scotia

In 2004, seven in ten (69%) visitors had travelled to Nova Scotia prior to their current trip; down marginally since 2000, where the comparable result was 73 percent. Consistent with 2000 results, Canadian visitors, especially those from Atlantic Canada, were more likely than Overseas visitors (40%) or US visitors (34% Other US, 53% New England) to have visited Nova Scotia before. Visitors to the province who were travelling for general pleasure or recreation (56%) were also less likely to have visited the province before, although this figure climbed 10 points compared to 2000 results. (Table 20a)

In terms of mode of travel, automobile visitors (71%) and air visitors (68%) were more likely than RV travellers (57%) to have travelled to the province in the past.

The majority of visitors who visited Nova Scotia before, had travelled to the province in the past two years (37% in 2004, 27% in 2003). Perhaps not surprisingly, visitors from Atlantic Canada (78%) were much more likely than those from other regions to have visited the province within the past two years. (Table 20b)

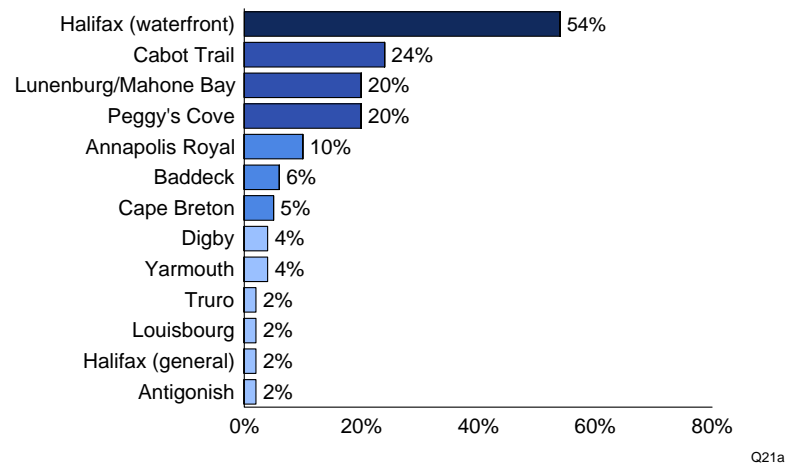


Trip Characteristics

Nova Scotia Destinations or Locations That Come to Mind

When asked to name destinations within the province that come to mind when thinking about Nova Scotia, the Halifax waterfront was mentioned most frequently, with over one-half of visitors thinking of the Halifax waterfront. An additional one-quarter mentioned the Cabot Trail, while two in ten each identified Lunenburg/Mahone Bay and Peggy's Cove. Annapolis Royal was the only other destination mentioned by at least 10 percent of visitors. (Table 21a)

Locations That Come To Mind



Atlantic Canadian visitors appear to be the most familiar with the Halifax waterfront, with two-thirds naming this destination. Overseas visitors (31%) and those from Quebec (32%) were more likely than other visitors to have named the Cabot Trail.

Specific Destinations

The following table illustrates the percentage of visitors who indicated they had visited specific Nova Scotia destinations. (Tables 21Ba-21Bf)

Visitation to Nova Scotia Destinations (% Saying Yes)								
	Overall %	Atl. Can. %	QC %	ON %	Western Can. %	New Eng. %	Other US %	Over-seas %
Halifax (waterfront)	57	52	63	62	63	53	67	57
Lunenburg/Mahone Bay	26	18	24	30	38	28	43	41
Peggy's Cove	24	14	31	30	35	25	43	29
Cabot Trail	20	11	27	23	26	29	37	36
Baddeck	17	10	15	19	25	22	33	27
Annapolis Royal	14	12	14	11	20	19	26	15



The Halifax waterfront was by far the most visited destination in the province in 2004. Relatively equal proportions visited Peggy's Cove and Lunenburg/Mahone Bay. One in five visitors went to the Cabot Trail. Visitors from Other US were the most likely to have visited each of the destinations under consideration.

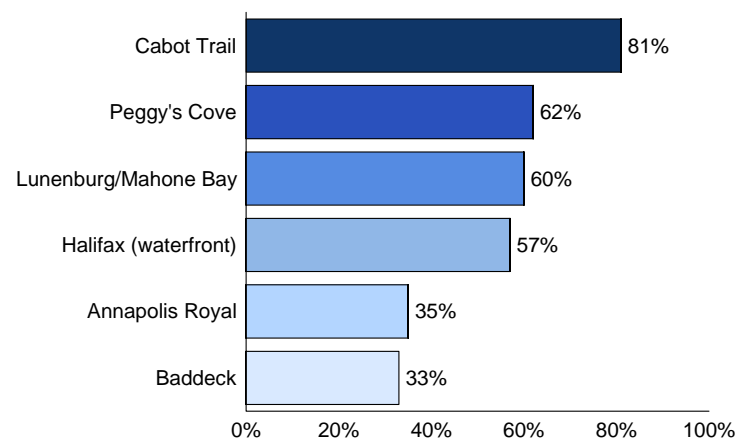
Importance of Places in Nova Scotia in Decision to Visit

Those who visited specific destinations within the province were asked to express on a 5-point scale (where 1 represents not at all important and 5 represents very important) how important that particular destination was in their decision to visit the province.

Despite being the most thought of and visited area in the province, perceived importance of the Halifax waterfront among visitors to this area was somewhat lower than for other areas of the province, with six in ten rating the Halifax waterfront as important (ratings of 4 or 5) in their decision. Overall, the Cabot Trail held the greatest appeal, with eight in ten visitors to the Cabot Trail indicating it was important in their decision to come to Nova Scotia. Similarly, visitors who went to Peggy's Cove and Lunenburg/Mahone Bay were likely to have said these particular destinations were important in their decision to visit the province. These results highlight the importance of Peggy's Cove, Lunenburg/Mahone Bay and the Cabot Trail to visitors who have a chance to experience these locations. (Table 21Ca-Cf)

Importance of Area in Decision to Visit NS

(Among Those Who Visited Area, % Rating 4 or 5)



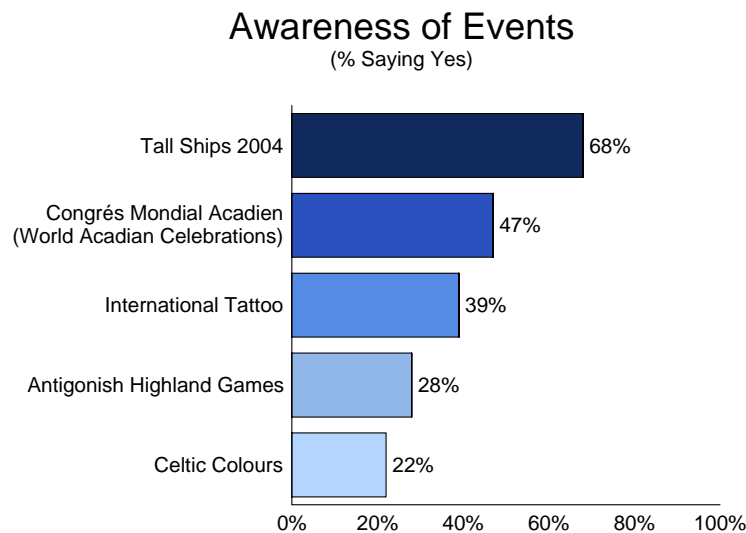
Q21Ca-Cf

Awareness of 2004 Nova Scotia Events

In unaided fashion, visitors were asked to name any events they were aware of that took place in Nova Scotia in 2004. Overall, visitors to the province were most likely to identify Tall Ships 2004 (36%), Congr s Mondial Acadien (22%), and the Nova Scotia International Tattoo (12%), with no other single event mentioned by more than seven percent of visitors.



Awareness was considerably higher when visitors were asked about a short list of events in an aided manner, with Atlantic Canadians having the highest level of awareness of most events queried. Notably, the Congr s Mondial Acadien had the highest awareness among visitors from Quebec (73%), while visitors from other regions had substantially lower awareness of this event. Furthermore, awareness of the Antigonish Highland Games was highest among visitors from Western Canada (38%). Overseas visitors were generally the least aware of any of the specific events. (Table 22Ba-22Be)



Q22Ba-Bf

Attendance of Specific Events

Among a list of specific events queried on the survey, Tall Ships 2004 (10%) was the most heavily attended event by visitors to the province, followed by Congr s Mondial Acadien (3%). Other events in the province had substantially lower attendance (1% or less). It is important to note that the percentage of visitors who attended these events appears low due to the fact that the events took place over a very short period of time (e.g., days, weeks), whereas the interviewing was conducted over many months. That is, the results are more important on a relative, than an absolute basis. Quebec visitors were more likely than other visitors to have attended the Congr s Mondial Acadien, while visitors from outside Canada were less likely than Canadian visitors to have attended Tall Ships 2004. (Tables 22Da-22Df)

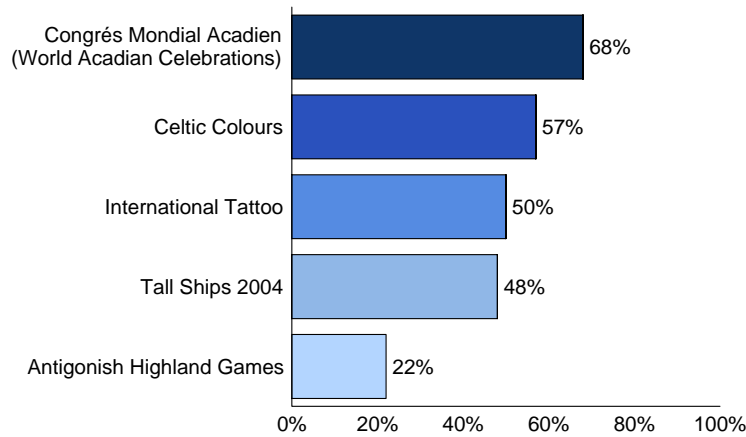
Importance of Events in Nova Scotia in Decision to Visit

Visitors who attended specific events in the province were asked to express on a 5-point scale (where 1 represents not at all important and 5 represents very important) how important that particular event was in their decision to visit the province. Perhaps not surprisingly, more than six in ten of those who attended the Congr s Mondial Acadien stated it was important in their decision to visit Nova Scotia, while more than one-half of those who attended Celtic Colours or the International Tattoo considered those events to be important in their decision. (Table 22Ea-22Ef)



Importance of Event in Decision to Visit NS

(Among Those Who Attended Event, % Rating 4 or 5)



Q22Ea-Ef

Participation in Activities

The following table illustrates the percentage of visitors who participated in a range of vacation activities. Generally, Atlantic Canadians were less likely than visitors from outside the Atlantic region to have participated in the activities under consideration. In contrast, those from United States and Overseas markets were generally more likely than others to participate in these various activities. (Tables 23a – 23m)

Participation in Activities (% Saying Yes)								
	Overall %	Atl. Can. %	QC %	ON %	West Can. %	New Eng. %	Other US %	Over-seas %
Leisurely walking or hiking	70	63	72	71	76	83	82	77
Nature observation	44	28	52	53	52	69	71	54
Going to an ocean beach for exploring or beach combing	33	20	43	39	46	52	51	41
Visit a national or provincial natural park	29	14	42	35	44	46	52	48
Birding	15	13	16	14	15	19	22	19
Hiking in remote wilderness area	13	6	19	15	14	28	24	35
Going to an ocean beach for swimming/sunbathing	10	5	11	16	15	11	11	14
Boat tour for whale and seabird watching	9	4	14	10	14	11	14	26
Other fishing or sightseeing boat tour	8	5	8	8	9	10	17	12
Golfing (not inc. mini-golf)	7	6	5	8	10	8	6	1
Mountain biking/cycling	2	1	2	3	2	4	3	3
Freshwater canoeing/kayaking	2	1	1	1	3	5	4	11
Sea kayaking	1	0	1	2	2	1	2	2



Similarly, the following table illustrates the percentage of visitors who visited a variety of places or events in Nova Scotia. Once again, travellers from Atlantic Canada were least likely to visit these places or events, while those from the United States and Western Canada were more likely to have done so. (Tables 24a – 24j)

Visitation to Places or Events (% Saying Yes)								
	Overall %	Atl. Can. %	QC %	ON %	West Can. %	New Eng. %	Other US %	Over-seas %
Craft shops or studio	56	47	55	61	71	68	70	52
National or provincial historic sites	39	24	45	45	58	51	63	63
Museums	36	26	36	40	46	49	59	46
Nightclubs/lounges/ pubs	26	23	27	29	36	30	27	22
Live performing music/dance presentations	22	16	26	26	29	28	31	25
Art galleries	17	13	21	17	22	25	26	22
Casino	16	18	11	15	19	16	15	5
Guided tours (not including boat tours)	11	3	10	17	20	17	27	20
Live performing theatre presentations	5	4	2	4	10	4	6	0
Research family history	4	4	4	4	8	5	3	1

The following nine activities or events had the highest participation rates in 2004:

- Leisure walking/hiking 70%
- Visiting craft shops/studios 56%
- Nature observation 44%
- Visiting a national/provincial historic site 39%
- Visiting museums 36%
- Beach exploring/beachcombing 33%
- Visit a national or provincial natural park 29%
- Visiting nightclubs, lounges or pubs 26%
- Live performing music or dance presentations 22%

Participation rates in 2004 are largely consistent with 2000 results. However, some differences are notable. Specifically, leisure walking or hiking was somewhat more popular in 2004, up 15 points since 2000. Moreover, an increased proportion of 2004 visitors stopped into craft shops or studios than in 2000, while museums also attracted more visitors in 2004 than in 2000.

Most Enjoyed Aspect of Trip to Nova Scotia

The following table illustrates what visitors liked most about their trip to the province. The column on the left contains visitors' first mentions, while the second column contains additional elements visitors indicated they liked. Generally speaking, results on this topic did not differ remarkably from results in 2000. (Tables 25a, 25b)



Aspects of Trip to Nova Scotia Most Enjoyed (Top mentions)			
	First Mention (%)	Other Mentions (%)	Total Mentions (%)
General scenery/sightseeing	27	26	53
Friendliness of the people	14	19	33
Coastal scenery	8	24	32
Opportunity to visit friends/relatives	16	7	23
Nature viewing (tides, fossils, wildlife, plants)	3	6	9
Experiencing Nova Scotia's culture and heritage	2	5	7
Cleanliness/untouched/unspoiled	2	5	7
A specific area or location of Nova Scotia	3	1	4
Weather	2	2	4

Visitors from Canada were more likely than Overseas visitors to list visiting friends or relatives as the most liked aspect of their visit, which is not unexpected given Canadian visitors were generally more likely to be coming to Nova Scotia for that purpose. US visitors were more likely than other visitors to identify sightseeing as the element they liked the most. Visitors from outside Atlantic Canada were also more likely to identify the friendliness of the people as something they really liked about their visit to Nova Scotia.

Nova Scotia's Greatest Need for Improvement

The following table illustrates visitors' perceptions of areas that offer the greatest opportunity for improvement in Nova Scotia. (Tables 26a, 26b)

Aspect of Nova Scotia That Need Improvement (Top mentions)			
	First Mention (%)	Other Mentions (%)	Total Mentions (%)
Nothing/no need for improvement	38	N/A	38
Improve roads/highways	20	5	25
More road signs	7	5	12
Reduce price of gas	5	2	7
Signs should be easier to read/follow	2	5	7

Compared with 2000, a greater number of visitors indicated there is nothing Nova Scotia needs to improve upon, with the current figure representing an increase of 6 percentage points since 2000. Consistent with 2000 results, the balance of visitors were most likely to identify improvements related to Nova Scotia's road/highway infrastructure.



Of note, those who travelled to the province by road (22% car, 34% RV) were much more likely than air travellers (12%) to indicate Nova Scotia's roads and highways needed improvement. Moreover, close to half (47%) of air travellers felt the province did not have to improve anything, while one-third of road visitors (34% car, 28% RV) offered the same response.

Activities Prior to Trip

Source of Advertising

Overall, television was by far the most named source of awareness of Nova Scotia advertising among visitors who recall seeing or hearing Nova Scotia tourism advertising. Newspapers and magazine were mentioned by substantially fewer, while one in ten attribute their awareness to the Internet or radio. Overseas visitors and visitors from Other US were much less likely than Canadian visitors and visitors from New England to identify television, while visitors from Atlantic Canada were less likely to identify newspaper, magazines or the Internet, and were more likely to identify radio as the advertising medium. (Table 27b)

Source of Awareness by Origin								
	Overall %	Atl. Can. %	QC %	ON %	West Can. %	New Eng. %	Other US %	Over-seas %
TV advertising	65	76	46	63	58	59	23	13
Newspaper	20	20	23	21	20	18	15	26
Magazine article	16	8	26	25	20	22	36	27
Internet/Worldwide Web	11	8	20	13	13	14	23	10
Radio	9	15	2	3	2	3	1	0
Direct Mail	8	8	8	8	5	5	7	16
Friend/Family/Word of mouth	3	3	1	3	5	1	6	12
Travel agency/Travel group	1	0	1	1	2	2	2	0

Activities Prior to Arriving in Nova Scotia

The following table illustrates the percentage of visitors who participated in the following pre-trip planning activities. Among the activities evaluated, gathering information via the Internet was most popular, and has marginally increased since 2000. In fact, one in ten visitors requested information on Nova Scotia through the Novascotia.com website. Compared with 2000, Nova Scotia's 1-800 number was utilized less often by visitors in 2004, with only one in eight indicating they phoned Nova Scotia's toll free number prior to coming to the province. Atlantic Canadians and Overseas visitors were even less likely to have used the 1-800 number. (Tables 28a – 28f)



Participation in Activities Prior to Trip To Nova Scotia								
	Overall %	Atl. Can. %	QC %	ON %	West Can. %	New Eng. %	Other US %	Over-seas %
Call 1-800 number	13	7	18	18	12	24	21	6
Request information on Nova Scotia via Internet	9	2	9	12	13	18	22	16
Browse the Internet for information on Nova Scotia	24	21	28	25	20	36	32	30
Contact travel agent or book package	4	0	3	5	5	5	13	11
Book package tour over Internet	1	0	1	1	1	4	6	3
Attend travel show	1	1	2	1	1	1	1	1

Visitor Information Centres/Tourist Bureaus

One-quarter of travellers reported stopping at a Visitor Information Centre (VIC) upon entering the province. Those from the US were most likely to have visited VIC/tourist bureaus, with no less than four in ten having visited when they first entered the province, and similar proportions visiting while travelling throughout Nova Scotia. The majority (57%) of RV visitors made a visit to a VIC when they first entered the province. By contrast, auto travellers (28%) and air travellers (12%) were much less likely to have visited a VIC when they first arrived in Nova Scotia. However, while travelling in the province, 32 percent of car travellers and 22 percent of air travellers visited a VIC. Overall, four in ten visitors stopped at a VIC at some point during their trip to obtain information about Nova Scotia, with RV travellers (71%), pleasure travellers (62%), and US residents (59%) mostly likely to have done so.

Those who stopped at a VIC/tourist bureau while travelling in Nova Scotia made an average of 2.5 visits, up from the 2000 average of 2.2. Visitors from Atlantic Canada made fewer visits to VICs than visitors from outside Atlantic Canada. (Tables 31a – 31c, 31ca)

Visited VIC/Tourist Bureau (% Saying Yes)								
	Overall %	Atl. Can. %	QC %	ON %	West Can. %	New Eng. %	Other US %	Over-seas %
At any point during trip	40	33	46	41	35	59	59	45
While travelling in NS	30	24	31	30	31	40	48	38
When first entering NS	25	18	34	28	17	43	40	28

Visitors who stopped at a VIC/tourist bureau were asked whether their visit to the VIC/tourist bureau had an impact on their activities while in Nova Scotia. It is encouraging that close to one-half (46%) of VIC/tourist bureau visitors felt they learned about an event, activity, or area of the province they did not know about before. Indeed, two in ten visitors (21%) stated they took



part in an activity or event as a result of their trip to the VIC/tourist bureau and one-quarter stated they visited a part of the province they would not have gone to otherwise. Of interest, 6 percent of visitors who stopped at a VIC/tourist bureau extended their stay in Nova Scotia as a result.

Consistent with 2000 results, visitors from Atlantic Canada (34% saying yes) were less likely than those from outside Atlantic Canada to indicate their visits to a VIC/tourist bureau had an impact on their knowledge of the province. Among those who extended their stay as a result of visiting a VIC/tourist bureau, the average visitor stayed an additional 2.0 nights, an increase over the 2000 result of 1.5 nights. Overall these results suggest that the VICs play an important role in the province's tourism infrastructure, as well as encouraging and informing visitors regarding Nova Scotia. (Tables 32a-32d)

Expectations of Government Sponsored Tourism Publication

A resounding majority of 87 percent believes the listings included in a government-sponsored publication should have met established standards prior to their inclusion. Expectations were high among visitors from all regions, with no less than eight in ten stating they felt listings should have already met established standards. (Table 33)

Preferred Language

Nine in ten (89%) visitors identified English as their preferred language, while 3 percent stated French was their preferred language. (Table 34)



Traffic Flow

This section of the report presents the community and route-specific results of the **2004 Nova Scotia Visitor Exit Survey**, as prepared by Corporate Research Associates Inc., on behalf of the Nova Scotia Department of Tourism, Culture & Heritage. The estimates presented in this report were based on a detailed analysis of routes travelled by non-resident overnight visitors to the province during the months of June through November 2004. In particular, several different indicators of tourism activity were provided for 83 Nova Scotia communities. In addition, travel data was also provided for various highways and routes throughout the province.

Detailed route and community information was available for a total of 3,924 overnight visitors to the province who travelled from June 24 to November 21, 2004. Data for these 3,924 visitors were weighted to match the known overnight visitor population in terms of entry point, season, mode of travel, and market region. Please note that all numbers expressed in this section were rounded to the nearest one-hundred.

Similar analyses of traffic flow have been conducted in previous years. Although there have been several infrastructure changes in the region in the past ten years that have likely had an impact on traffic flow (including the Cobequid Pass toll highway, the Confederation Bridge, and the high-speed ferry between Yarmouth and Bar Harbor, Maine), all of these changes occurred more than five years ago. As a result, the primary impact of these changes would have been witnessed in the 2000 Visitor Exit Survey. It is worth noting, however, that there were large-scale events that took place in 2004, most notably the Congr s Mondial Acadien, which may have affected traffic flow throughout the province.

For ease of presentation, much of the results were presented in a graphical format using GIS mapping technology. More specifically, separate maps displayed each of the various traffic flow statistics (e.g., overnights, total party trips) across the province for the communities surveyed. Such a display made it easier to discern regional travel patterns.



Routes

The table below indicates the percentage of all parties visiting the province that travelled either a portion of, or the entire length of, a particular highway or route. As would be expected, the 100-series highways received the bulk of visitor traffic in 2004, with secondary highways receiving much lower levels of traffic. Indeed, the Cabot Trail was the only non-100-series highway to garner more than 10 percent of visiting parties.

Highway 102 between Truro and Halifax continued to be the most frequently travelled route, with over 80 percent of parties travelling at least a portion of this route. Highway 104, both from Amherst to Truro and from Truro to Cape Breton, were the next most frequently travelled routes, consistent with the fact that visitors to Nova Scotia are most likely to enter/exit through Amherst.

Elsewhere, Highway 103 on the South Shore was heavily travelled, especially between Halifax and Lunenburg, while the Evangeline Trail (Highway 101) also saw more than one-quarter of parties travel at least a portion of it. As in 2000, Highway 101 between Kentville and Yarmouth had the largest percentage of parties travel only a portion of the route, as opposed to travelling the entire route. Finally, in Cape Breton, the most frequently travelled routes included Highway 105 between Port Hastings and Sydney and the Cabot Trail. With respect to the Cabot Trail, 80 percent of visitors travelling the Trail drove its entire length.

ROUTE	Drove Portion or All of Route	Drove All of Route
Evangeline Trail		
Hwy. 101 - Kentville to Yarmouth	31%	7%
Hwy. 101 - Halifax to Kentville	27%	19%
South Shore		
Hwy. 103 - Halifax to Lunenburg	36%	32%
Hwy. 103 - Lunenburg to Yarmouth	25%	10%
Central Nova		
Hwy. 102 - Halifax to Truro	81%	56%
Hwy. 104 - Amherst to Truro	56%	53%
Hwy. 2/209 - Joggins to Five Islands (Glooscap Trail)	5%	1%
Antigonish-Eastern Shore		
Hwy. 7/16 Halifax to Port Hastings (Marine Drive)	10%	2%
Hwy. 7 - Antigonish to Sherbrooke	5%	5%
Pictou County		
Hwy. 6/245/337 - Amherst to Cape George (Sunrise Trail)	8%	0%
Hwy. 104 - Truro to Cape Breton	53%	28%
Cape Breton		
Hwy. 105 - Port Hastings to Sydney	29%	16%
Hwy. 4 - Port Hawkesbury to Sydney (Bras d'Or Lakes Drive)	12%	9%
Hwy. 255 (Marconi Trail)	10%	1%
Cabot Trail	23%	18%
Hwy. 247 - St. Peters to Sydney (Fleur-de-lis Trail)	2%	1%



Communities

The following tables indicate the percentage of all parties visiting the province according to the communities to which they travelled throughout their trip. In particular, the tables indicate the percentage of all parties that were in the area of the community (i.e., passed through, visited or stayed overnight), the percentage that stopped in a specific community (i.e., for a visit or overnight), and the percentage that stayed at least one in night in a specific community. In addition, the tables display the average number of nights spent in each community among those who stayed overnight.

COMMUNITY	Percentage in area	Percentage who stopped	Percentage who stayed at least one night	Average number of nights stayed
South Shore				
Bridgewater	24%	7%	2%	3.2
Caledonia	5%	<1%	<1%	5.9
Chester	34%	10%	2%	4.3
La Have	4%	3%	1%	10.4
Liverpool	18%	5%	2%	4.5
Lunenburg	31%	20%	5%	2.1
Mahone Bay	33%	13%	1%	6.7
New Germany	3%	<1%	<1%	5.1
New Ross	2%	<1%	<1%	12.6
Pubnico	10%	1%	<1%	7.4
Shelburne	11%	4%	1%	4.8
Yarmouth				
Yarmouth	14%	8%	5%	3.2
Pictou County				
Caribou	30%	2%	1%	3.0
New Glasgow	40%	13%	6%	2.4
Pictou	34%	7%	3%	2.4
Antigonish-Eastern Shore				
Antigonish	35%	11%	5%	2.2
Canso	2%	1%	1%	6.7
Cape George	2%	1%	<1%	1.7
Guysborough	3%	1%	<1%	7.5
Isaac's Harbour	2%	<1%	<1%	2.0
Liscombe	7%	2%	1%	1.4
Middle Musquodoboit	1%	1%	<1%	4.4
Musquodoboit Harbour	9%	2%	1%	5.8
Sheet Harbour	8%	3%	1%	5.1
Sherbrooke	7%	2%	1%	3.2



COMMUNITY	Percentage in area	Percentage who stopped	Percentage who stayed at least one night	Average number of nights stayed
Central Nova				
Advocate Harbour	1%	1%	<1%	2.5
Amherst	57%	7%	4%	1.5
Brookfield	61%	1%	<1%	3.1
Five Islands	4%	2%	<1%	1.6
Joggins	1%	<1%	<1%	1.7
Noel	4%	1%	<1%	2.2
Oxford	53%	3%	<1%	3.3
Parrsboro	4%	2%	1%	2.2
Pugwash	5%	2%	<1%	4.0
South Rawdon	5%	<1%	<1%	3.4
Springhill	4%	1%	<1%	1.1
Stewiacke	60%	2%	<1%	3.9
Tatamagouche	6%	2%	1%	6.4
Tidnish	2%	<1%	<1%	6.5
Truro	74%	20%	9%	2.3
Metro Halifax				
HRM	78%	67%	56%	3.5
Peggys Cove	24%	20%	2%	2.5
Evangeline Trail				
Annapolis Royal	25%	10%	3%	2.6
Berwick	23%	3%	1%	5.3
Blomidon	1%	1%	<1%	2.2
Bridgetown	22%	2%	1%	4.5
Church Point	11%	2%	1%	3.6
Digby	26%	16%	8%	2.2
Grand Pre	26%	6%	1%	1.7
Hantsport	26%	1%	<1%	1.6
Kejimikujik National Park	7%	2%	1%	2.8
Kentville	25%	4%	2%	3.6
Middleton	23%	3%	1%	3.6
Mount Uniacke	20%	<1%	<1%	3.8
Port Royal	2%	1%	<1%	5.1
Walton	4%	<1%	<1%	8.2
Westport	3%	3%	1%	5.0
Weymouth	11%	1%	<1%	5.4
Windsor	25%	3%	1%	3.0
Wolfville	25%	7%	3%	2.2



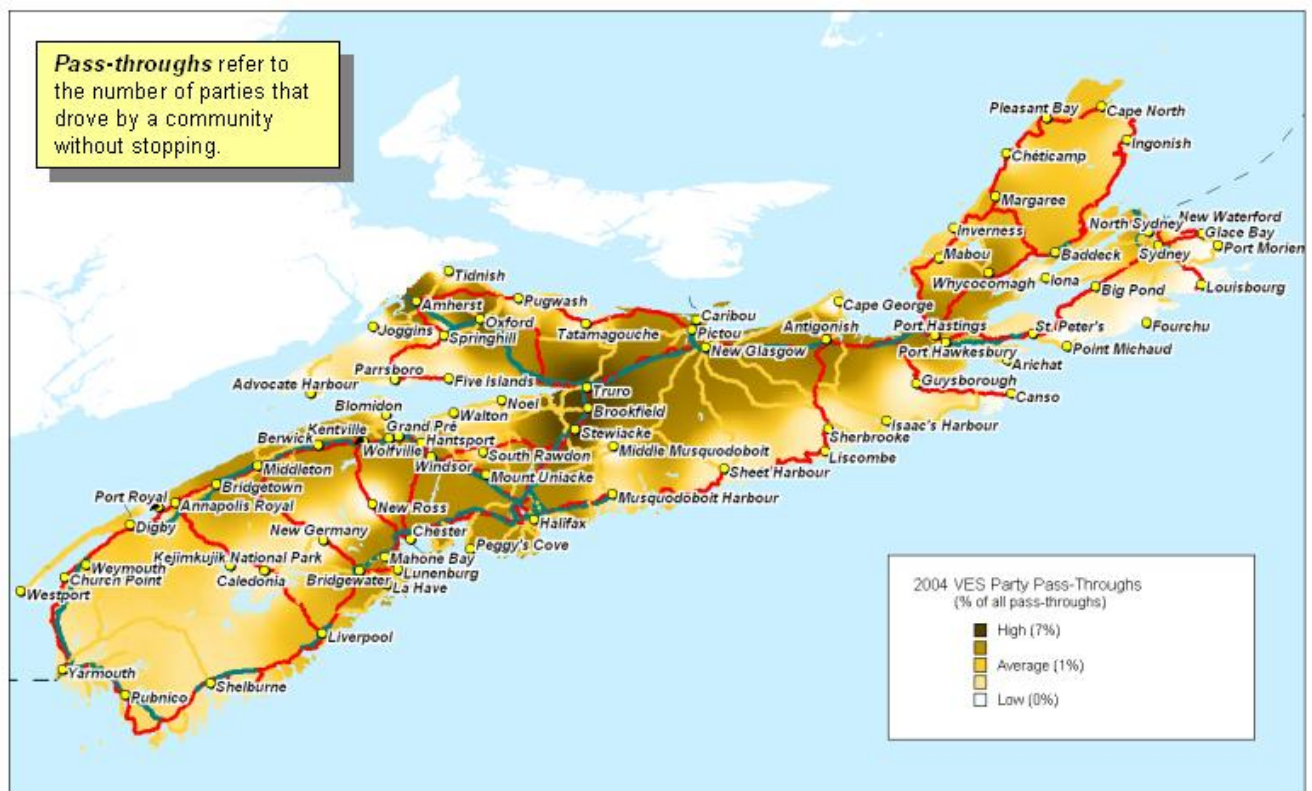
COMMUNITY	Percentage in area	Percentage who stopped	Percentage who stayed at least one night	Average number of nights stayed
Cape Breton				
Arichat	1%	1%	1%	4.6
Baddeck	26%	16%	9%	2.2
Big Pond	9%	2%	<1%	4.4
Cape North	19%	5%	1%	1.6
Cheticamp	20%	13%	6%	1.8
Fourchu	1%	<1%	<1%	7.0
Glace Bay	3%	2%	1%	4.7
Ingonish	19%	11%	5%	1.5
Inverness	13%	4%	1%	3.1
Iona	1%	1%	<1%	4.6
Louisbourg	9%	9%	3%	2.0
Mabou	13%	3%	1%	3.5
Margaree Forks	21%	4%	1%	2.9
New Waterford	2%	1%	<1%	5.5
North Sydney	20%	6%	4%	2.8
Pleasant Bay	19%	6%	<1%	1.8
Point Michaud	1%	1%	<1%	1.8
Port Hastings	32%	6%	2%	5.5
Port Hawkesbury	12%	4%	2%	2.0
Port Morien	1%	<1%	<1%	6.6
St Peters	10%	4%	1%	5.5
Sydney	17%	7%	4%	5.4
Whycocomagh	26%	3%	1%	2.6



Pass-Throughs

An analysis of pass-throughs reveals the paths most commonly taken by visitors through the province in 2004. Since pass-throughs do not include stops of any great length (i.e., less than 30 minutes), this information tends to be reflective of the major routes through the province.

As shown in the map below, the greatest number of pass-throughs occurred in the central and northern regions of mainland Nova Scotia, especially the corridor between Halifax and Truro along Highway 102. It is clear from this map that there was a large volume of travellers between Amherst and Halifax, and between Amherst and Cape Breton who travelled these routes without stopping. Similar results were evident for travellers between Halifax and Digby along Highway 101, albeit with slightly decreased volumes. On Cape Breton Island, a relatively larger number of pass-throughs were evident on the northern routes of the Island, compared with the southern routes. Communities along the Eastern Shore also witnessed a relatively lower number of pass-throughs.



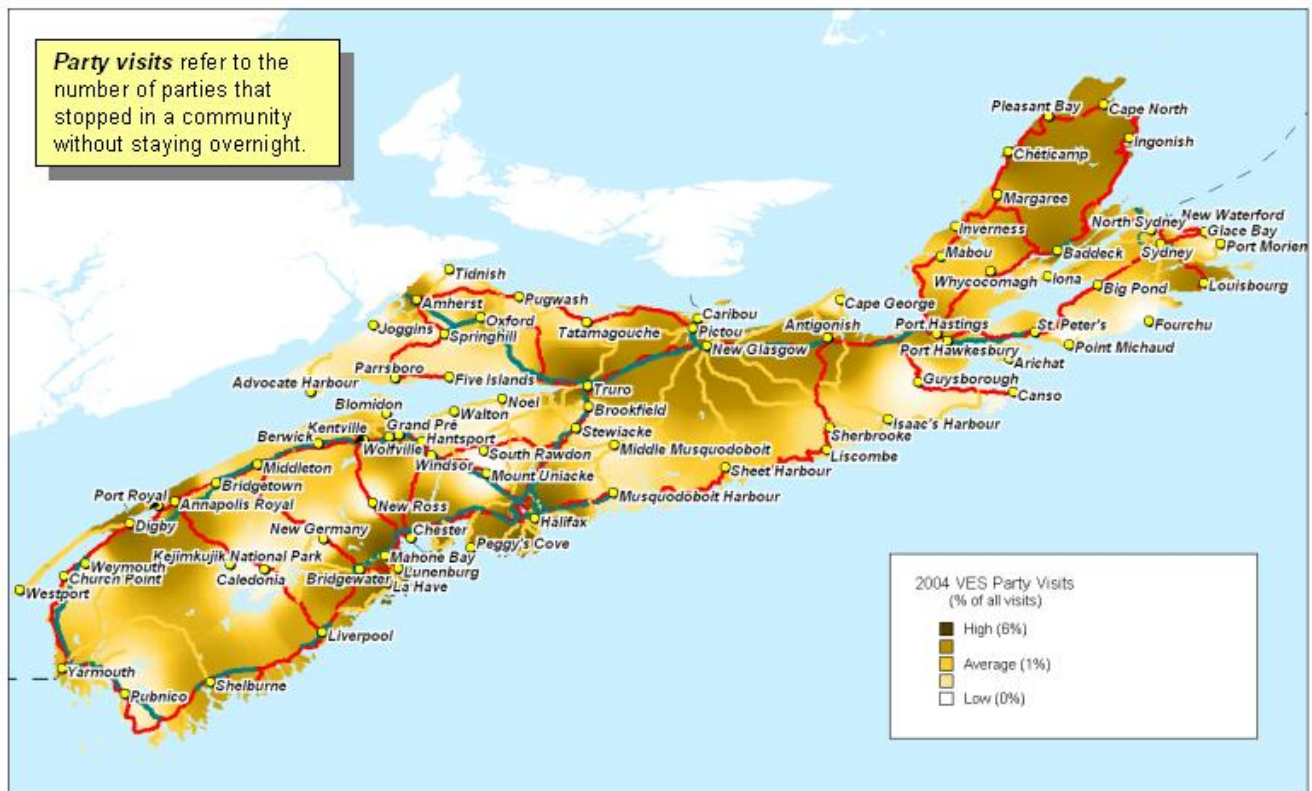
It is worth keeping in mind that pass-throughs and stops (i.e., visits and overnights) are mutually exclusive. Thus, given the same visitor volume, if one community is high in pass-throughs, it must by definition be lower in stops. Although pass-throughs represent “potential” in terms of consumer base, they should be considered a “negative,” in that they are reflective of parties that did not stop.



Visits

Visits refer to the number of parties that stopped for at least 30 minutes in a community, but did not stay overnight. Information regarding visits tends to be reflective of either of two things: likely stopping points en route to a destination or on the destination itself.

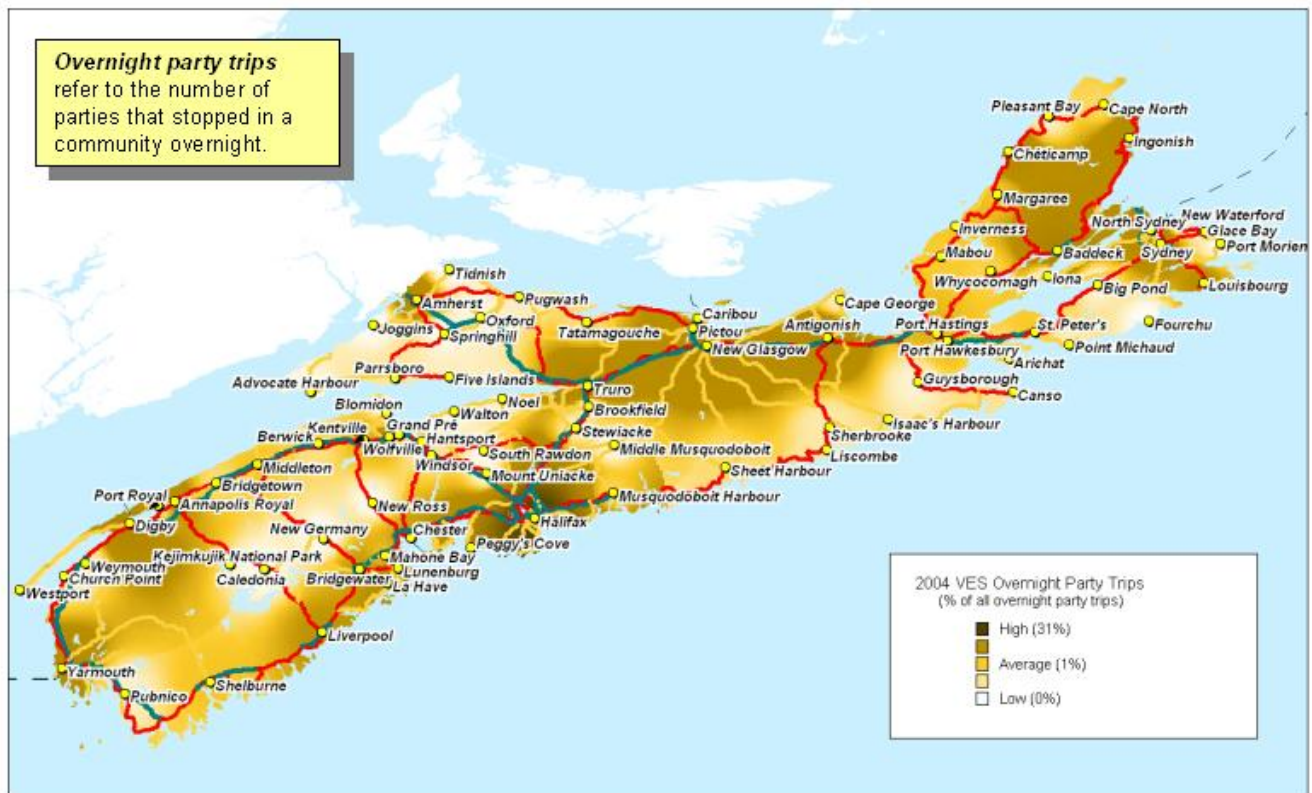
The following map reveals several areas throughout the province that had relatively high rates of visits. By far the largest number of visits in the province occurred in Peggy’s Cove, and this is consistent with previous years. Peggy’s Cove was a large draw, but is off the highway and has relatively few places to stay nearby, so it is not surprising this area once again led the way in visits (as opposed to overnights). Other hot spots for visits included the South Shore areas between Chester and Bridgewater, the communities along the Cabot Trail, the Digby/Annapolis Royal area, and the section of Highway 104 between Truro and Antigonish. This latter area was likely high in visits owing to its location between Cape Breton and Halifax.



Overnights

Overnights refer to the number of parties that stopped overnight in a particular community. Information regarding overnight visits is straightforward and is strongly related to the accommodations available at a particular location.

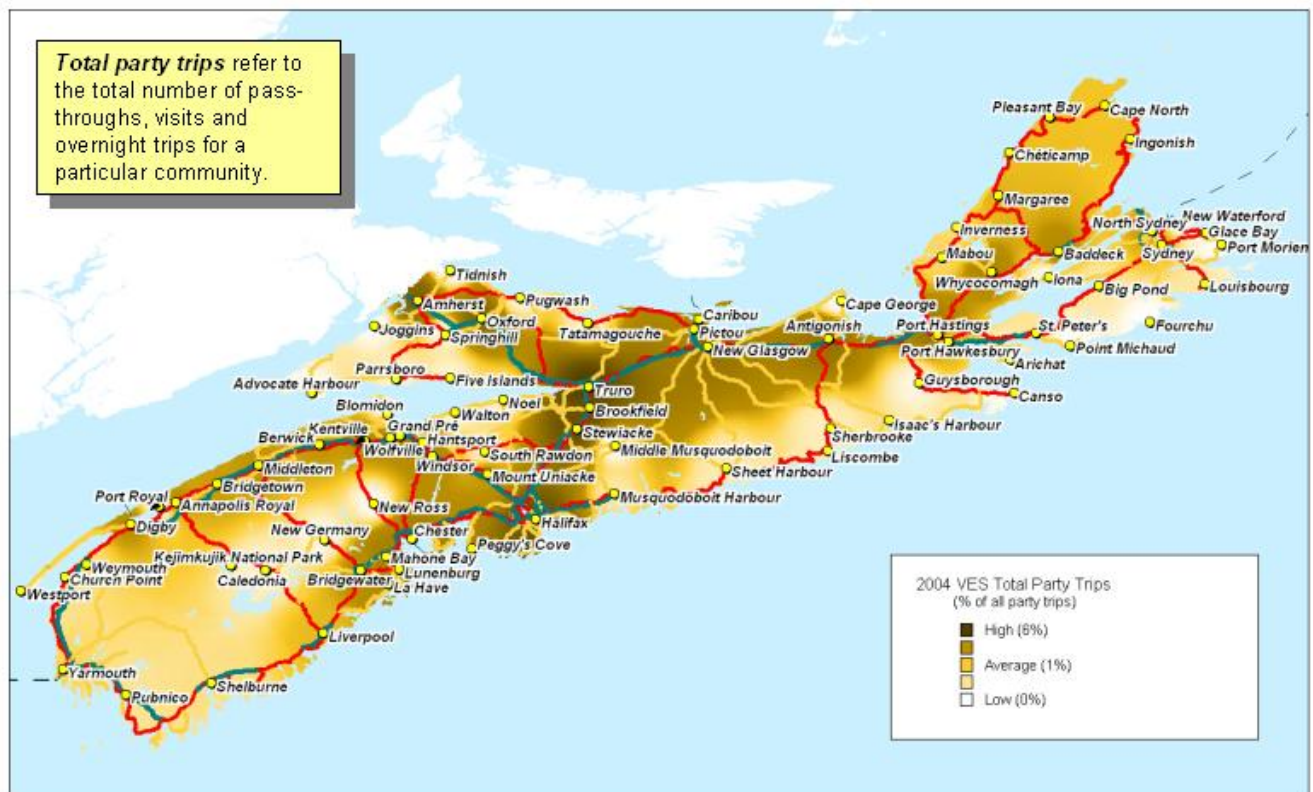
As would be expected, the map below indicates the largest number of parties stayed overnight in the Halifax area. Indeed, well over one-half of all parties stayed overnight in the Halifax Regional Municipality, and nearly one-third of all overnight trips occurred in the HRM. Both of these figures were consistent with previous research. While the HRM was by far the most common spot for parties to stay overnight, other popular overnight locations included the Truro to Antigonish corridor along Highway 104, the Cabot Trail, and Digby.



Total Party Trips

Total party trips is an important measure in that it reflects the total number of parties that passed through, visited, or stopped overnight in a particular community. Thus, this measure is an indicator of the total volume of traffic to a community and is in some sense an amalgam (weighted) of the three previous maps.

The map below reveals that most of the non-resident visitor traffic in Nova Scotia was through the central and northern regions of the province along Highways 102 and 104. This was largely because of pass-throughs for communities along these particular routes. The area around Halifax also ranked high due to the large number of overnight trips to this area. Of note, the Eastern Shore beyond Sheet Harbour, the southern regions of Cape Breton from Arichat to Fourchu, and the peninsula north of the Bay of Fundy ranked much lower in terms of total party trips.



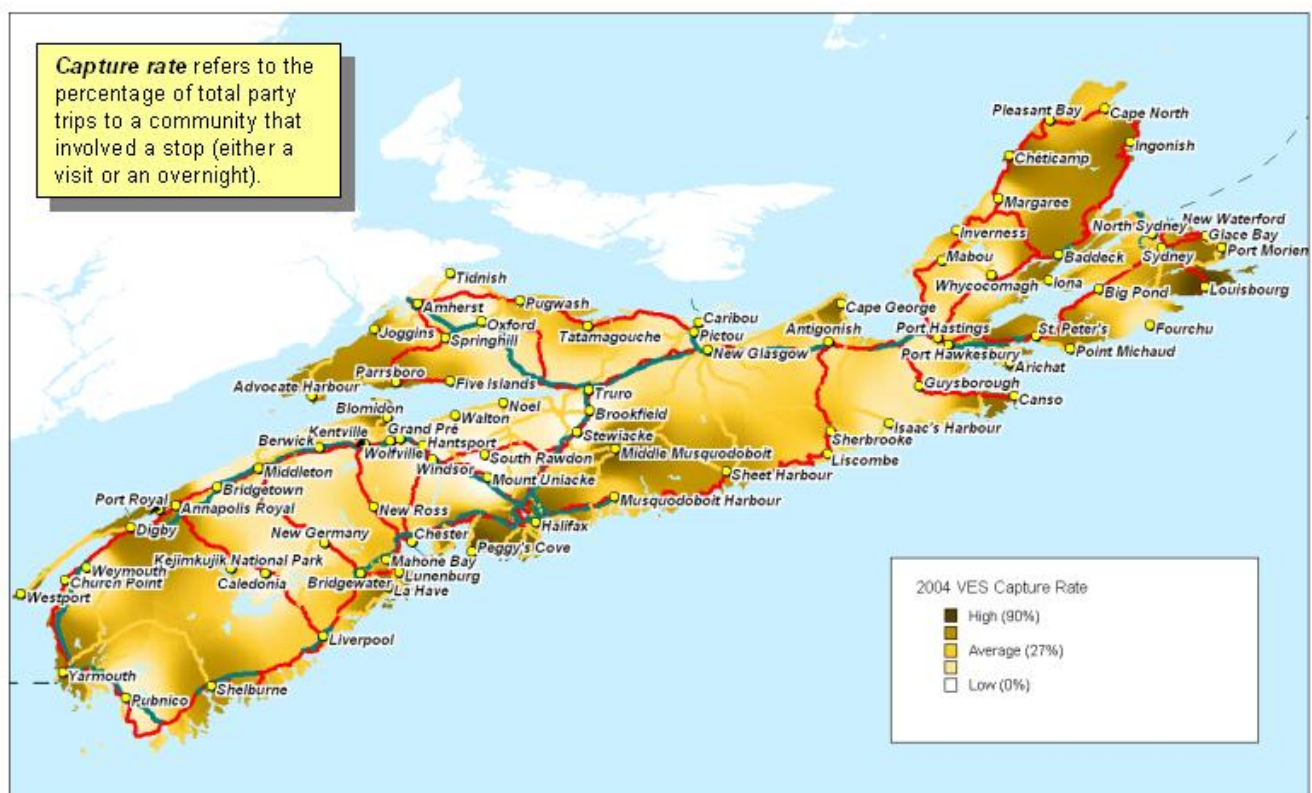
This map clearly shows the influence of the province's entry points, with larger than average volumes of visitors entering through Amherst, Caribou, North Sydney, and Digby, and travelling to Halifax. Perhaps the most noteworthy result on this map, however, is the relatively low traffic volumes observed for Yarmouth. Although a major entry/exit point connecting to the US market, Yarmouth had lower traffic volumes than any other entry point community. This represents a marked change since the 2000 VES, at which time Yarmouth was on par with or ahead of entry point communities such as Digby and Caribou. Since that time, travel to Digby and Caribou rose, while travel to Yarmouth declined. These results suggest visitors to the province are now either less likely to enter/exit the province via Yarmouth or less likely to travel to Yarmouth during their trip.



Capture Rate

Results for capture rate are also derived from other traffic flow statistics. Specifically, capture rate reflects the percentage of parties that stopped in a community, whether it be for a short period or overnight, out of the total number of parties travelling to a community (i.e., total party trips).

Consistent with previous research, capture rate tends to be higher for areas representing endpoints or destinations along a travel route. In particular, Peggy's Cove, Louisbourg, Arichat, Blomidon, and Westport had the highest capture rates, with over 80 percent of all parties travelling to these communities stopping for at least 30 minutes. Other areas with relatively high capture rates included HRM, the Cabot Trail communities (especially Cheticamp and Ingonish), Cape George, Canso, and Middle Musquodoboit.



In contrast, Brookfield, Mount Uniacke, South Rawdon, Stewiacke, and Oxford had the province's lowest capture rates, with these communities situated just off major travel arteries through the province.



Regional Reporting

Based on the data collected on the community traffic flow portion of the survey, it was possible to report results for those visitors travelling to seven distinct tourism regions throughout the province. The communities included on the survey are listed in the following table according to their respective tourism region. Only those visitors who stopped for at least 30 minutes or stayed overnight in a community within a tourism region were considered to have visited that region.

Tourism Regions and Associated Communities						
Annapolis Valley	South Shore	HRM	Northumberland Shore	Fundy Shore	Eastern Shore	Cape Breton
Yarmouth	Caledonia	Halifax	Cape George	South Rawdon	Guysborough	Big Pond
Kejimkujik National Park	New Germany	Dartmouth	Antigonish	Walton	Canso	Ingonish
Church Point	New Ross	Bedford	New Glasgow	Noel	Isaac's Harbour	Cape Breton Highlands
Weymouth	Pubnico	Sackville	Pictou	Stewiacke	Sherbrooke	Cape North
Westport	Shelburne		Caribou	Brookfield	Liscombe	Pleasant Bay
Digby	Kejimkujik Seaside Adjunct		Tatamagouche	Five Islands	Sheet Harbour	Cheticamp
Port Royal	Liverpool		Pugwash	Parrsboro	Middle Musquodoboit	Margaree Forks
Annapolis Royal	Bridgewater		Oxford	Advocate Harbour	Musquodoboit Harbour	Inverness
Bridgetown	LaHave		Tidnish	Joggins		Mabou
Middleton	Lunenburg		Amherst	Truro		Arichat
Berwick	Mahone Bay			Springhill		St. Peter's
Kentville	Chester					Point Michaud
Wolfville	Peggy's Cove					Fourchu
Blomidon						Louisbourg
Grand Pre						Port Morien
Hantsport						Glace Bay
Windsor						New Waterford
Mt. Uniacke						Sydney
						North Sydney
						Baddeck
						Iona
						Whycocomagh
						Port Hawkesbury
						Port Hastings

Travel to the various tourism regions was not mutually exclusive. That is, one party may have travelled to (and therefore have been included in the analysis for) multiple tourism regions during their trip. Results from 2004 results indicate that two-thirds of Nova Scotia visitors travelled to more than one tourism region, with 20 percent travelling to four or more tourism regions. Also, as not all visitors provided valid traffic flow data, the tourism region results were drawn from a slightly different pool of visitors than the overall visitor population. The overall effect of this



difference was minor however.

Traffic Flow Definitions

Route Information

Drove Portion of Route	Represents the percentage of all non-resident parties that drove a portion of a specific route.
Drove Entire Route Once	Represents the percentage of all non-resident parties that drove the entire length of a specific route.

Community Information

Party Pass Throughs	Represents non-resident party trips passing through or by a specific community (or with a stop of less than 30 minutes).
Party Visits	Represents non-resident party trips involving a stop of 30 minutes or more, but not overnight, in a specific community.
Overnight Party Trips	Represents non-resident party trips involving a stop of one or more nights in a specific community.
Total Party Trips	Represents the sum of party pass throughs, party visits and overnight party trips for a specific community.
Parties	Represents the total number of unique, non-resident parties passing through, visiting or staying overnight in a specific community.
Party Nights	Represents the total number of nights stayed by non-resident parties in a specific community.
Capture Rate	Percent of total party trips through a community that involved a visit or an overnight stay.

