

This bulletin presents research findings from the 2010 Visitor Exit Survey (VES), and includes new insights on Nova Scotia's pleasure visitors.

The 2010 Visitor Exit Survey can be found at www.gov.ns.ca/econ/tourism/research/reports

Nova Scotia Tourism Market Profile: Culinary Enthusiasts

Segmentation analysis of pleasure visitors to Nova Scotia revealed 10 groups representing 74% of pleasure visitors, shown in Figure 1.

This bulletin profiles Culinary Enthusiasts, a segment representing 5% of the province's pleasure visitors (See Figure 1). Figure 2 illustrates the segments across three dimensions: segment size, average length of stay and average party spend. The chart shows that Culinary Enthusiasts are among the top four high-yield segments who spend an average of \$2,030 per party while in Nova Scotia and have an average length of stay (5.7 nights).

Figure 1: NS Visitor Segments, by Market Share

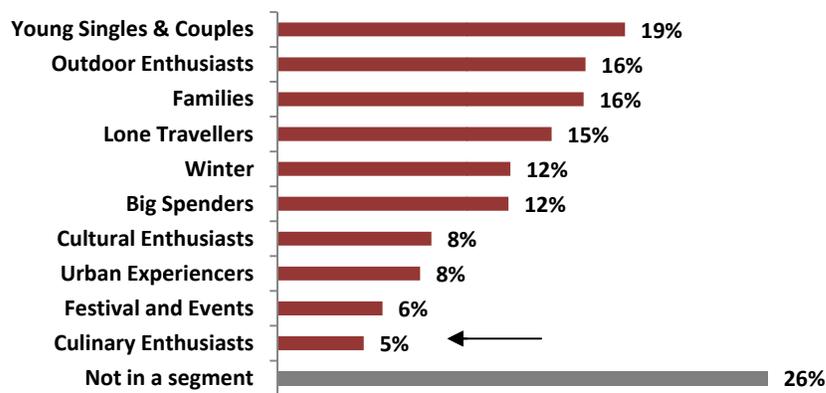
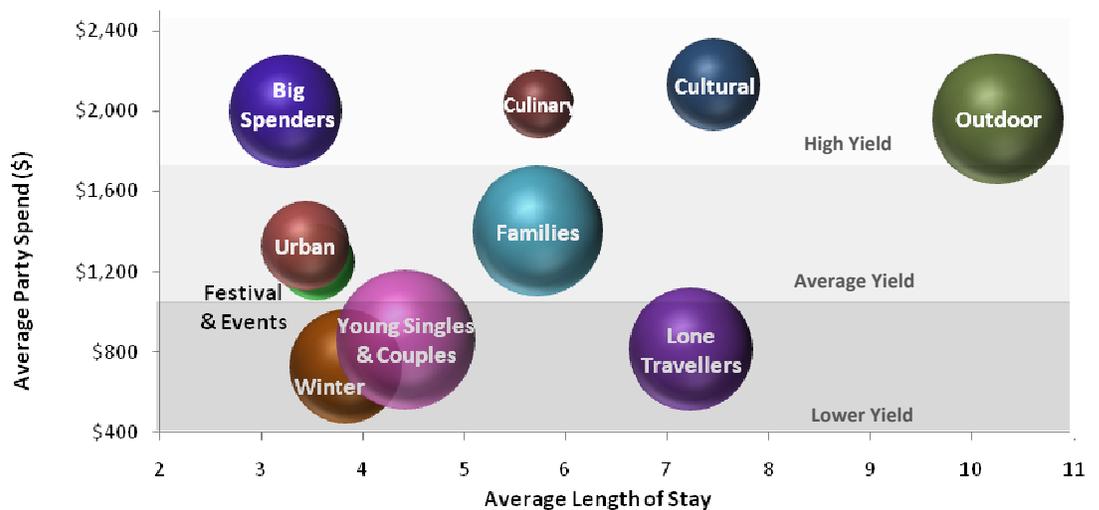


Figure 2: NS Visitor Segments by Yield Band and Length of Stay



The methodology used to develop these segments is detailed at the end of this report. Research bulletins are available for other visitor segments at www.gov.ns.ca/econ/tourism/research/reports.

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Culinary Enthusiasts: Defined

This segment includes pleasure visitors who are highly motivated by Nova Scotian culinary product and experiences. Culinary Enthusiasts include visitors who: ranked local Nova Scotian food at least 8 out of 10 in importance in their decision to visit Nova Scotia; visited a winery or a local food producer; and had higher spending on restaurants (per person/per day basis).

The Culinary Enthusiast segment is Nova Scotia's smallest visitor segment, but is important as they are a high-yield, niche group highly motivated by Nova Scotia's culinary product. Visitor and trip characteristics are noted in Table 1.

Culinary Enthusiasts are primarily comprised of couples (51%) and lone travellers (20%) who have higher levels of education and higher incomes compared to all pleasure visitors. The average party size for visitors in this segment is 1.9 people, somewhat lower than average.

A higher percentage of Culinary Enthusiasts come from Western Canada, 23% compared to 10% of all pleasure visitors, with another 50% comprised of visitors from Atlantic Canada and Ontario. This higher percent of longer-haul visitors means that more Culinary Enthusiasts arrive in NS by air (54% compared to 33% for all pleasure visitors).

Nova Scotia's visitor population includes a large percentage of baby boomers and a smaller but growing number of 20 to 30 year olds. Culinary Enthusiasts are more likely to be mature travellers, especially 55 and older, and travel parties have fewer young adults and children.

While unique in their high motivation to experience Nova Scotian food, Culinary Enthusiasts are similar

to Cultural Enthusiasts and Outdoor Enthusiasts in their activity level. All three of these high-yield segments have higher than average participation rates in various tourism activities indicating they are highly engaged and keep busy while on vacation. Table 2 illustrates this by comparing participation rates of these segments to the average pleasure visitor. The most popular activities completed by Culinary Enthusiasts include: visiting the Halifax waterfront (64%), craft shops (57%), museums and historic sites (52%) and wineries (41%). These visitors also show higher participation in outdoor activities (63% compared to 53% for all pleasure visitors).

Culinary Enthusiasts have a high level of trip satisfaction across a range of factors. Local NS food, the seacoast, culture and people, interesting activities, history and heritage, and city and urban experiences in easy reach received above average scores. Fifty percent of Culinary Enthusiasts indicate their trip exceeded expectations compared to 39% of all pleasure visitors. As well, 78% percent indicate they would definitely recommend Nova Scotia to their friends and family compared to 66% of pleasure visitors who indicated the same.

Culinary Enthusiasts primarily stay in hotels or with friends and family, and although only 24% of culinary Enthusiasts stay in B&Bs, this is significantly higher

Table 1: Culinary Enthusiasts' Visitor and Trip Characteristics compare to Pleasure Visitors

	Culinary Enthusiasts	All Pleasure Visitors
Party Composition	Couples, lone travellers	Couples, families, lone travellers
Completed University	62%	51%
Household Income	Over \$80,000: 53%	Over \$80,000: 46%
Accommodation Preferences	Hotels (52%), friends/family (43%), B&Bs (24%)	Hotels (43%), friends/family (42%), motels (12%)
Motivations for Visiting (1-10; 10 being highest)	Local food (9.0); seacoast (9.0), landscape & wildlife (8.7), culture & people (8.2), rejuvenation (8.0)	Seacoast (7.7), landscape and wildlife (7.5), do interesting things (7.1), culture & people (7.0), rejuvenation (7.0)
Satisfaction Ratings	Trip exceeded expectations: 50%	Trip exceeded expectations: 39%

than average (9% for all pleasure visitors). Culinary Enthusiasts tend to use novascotia.com more than average prior to visiting (61% compared to 36% of all pleasure visitors) and have average rates of using laptops, Smartphones or GPS units to gather travel information while here.

Culinary Enthusiasts report significantly higher rates of visiting two tourism regions – the Fundy & Annapolis Valley and South Shore regions – and average rates for the remaining regions (see Table 3). Additional information is required to determine whether this is related to the culinary experiences available in those regions.

Table 2: Activity Rate Comparison of the High-yield, Activity/Motivation Segments to Pleasure Visitors

Activities	Culinary Enthusiasts	Cultural Enthusiasts	Outdoor Enthusiasts	All Pleasure Visitors
Cultural Activities				
Farms/food producers	82%	36%	32%	18%
Halifax Waterfront	64%	70%	57%	50%
Craft shops/studios	57%	92%	64%	40%
Museums	52%	87%	62%	36%
Winery	41%	15%	14%	8%
Parks, fossils, geo sites	33%	38%	48%	20%
Nightclubs/lounges	38%	37%	29%	27%
Art galleries	24%	49%	27%	14%
Music performances	23%	28%	30%	18%
Festivals/events/fairs	18%	24%	24%	13%
Guided tours	17%	24%	14%	8%
Celtic Colours	2%	18%	9%	4%
Outdoor Activities	63%	72%	100%	53%
Hiking	40%	37%	75%	23%
Coastal sightseeing	39%	50%	71%	27%
Beach exploring	37%	45%	81%	24%
Nature observing	19%	32%	63%	17%
Swimming/sunbathing	15%	23%	53%	16%
Whale watching	11%	16%	32%	7%
Sail/boat tours	5%	10%	19%	5%

As noted in the methodology section, there is overlap between the segments due to characteristics used to create the visitor segments. The Culinary Enthusiasts have similar levels of overlap with Outdoor Enthusiasts, Cultural Enthusiasts and Big Spenders. Visitors in three of the high-yield segments are similar along several trip characteristics and have similar interests contributing to this overlap.

Table 3: Regions Visited by Culinary Enthusiasts

	Culinary Enthusiasts		All Pleasure Visitors	
	Stopped or Stayed	Stayed Overnight	Stopped or Stayed	Stayed Overnight
Halifax Regional Municipality	80%	62%	76%	65%
Fundy Shore & Annapolis Valley	66%	39%	44%	22%
South Shore	57%	26%	37%	15%
Northumberland Shore	44%	18%	37%	14%
Cape Breton Island	27%	19%	29%	25%
Eastern Shore	10%	3%	9%	4%
Yarmouth & Acadian Shores	9%	3%	7%	3%

Table 4: Average Party Spend

Cultural Enthusiasts have an average party spend of \$2,030 compared to \$1,280 for all pleasure visitors. Below is a detailed breakdown of their expenditures.

	Culinary Enthusiasts	Pleasure Visitors
Accommodations	\$510	\$320
Campgrounds	\$5	\$15
Meals in restaurants, bars	\$630	\$290
Groceries and liquor	\$140	\$110
Gas, auto repair	\$130	\$130
Car rental	\$200	\$100
Taxis, limos	\$10	\$10
Tolls	\$5	\$5
NS cultural products	\$130	\$60
Clothing	\$70	\$80
Shopping	\$90	\$80
Culture and entertainment	\$80	\$60
Sport and recreation	\$20	\$20
Total	\$2,030	\$1,280

Research Methodology

Basic segmentation of tourists generally involves dividing the visitor population into three main groups – business, pleasure and visiting friends and relatives (or VFR). A more extensive segmentation exercise was undertaken to look deeper into the pleasure visitors to determine the main motivation behind their visit. The definition of pleasure visitors was broadened to include VFR tourists who indicated they combined their VFR trip with a pleasure component as they share many similar characteristics to those visiting entirely for pleasure.

Initially, the approach involved grouping respondents by selecting factors visitors ranked highly in their decision to visit and the activities they participated in. This approach was used to find what visitors were highly motivated by and to also ensure motivation matched intention.

After the initial activity and motivation groups emerged, additional analysis involved determining which segments did a good job of representing the pleasure visitor population based on meeting the following criteria:

- did the segment demonstrate unique characteristics so that separate profiles emerge;
- was the segment large enough to be relevant to the visitor population; and,
- were there enough respondents in the segment that didn't belong to (or overlap with) another segment.

The resulting groups were useful, however the range of segments needed to represent a larger portion of the visitor population. Additional dimensions outside of activities and motivations were added to the selection

criteria, such as party composition and time of year, and new segments emerged from this exercise.

These new segments met our criteria for having unique characteristics and a useful size, however a higher level of overlap was allowed. This was necessary because a selection criterion was based on characteristics that had natural overlap. For example, those in the family segment do outdoor and cultural activities while here, so there are respondents who belong to both groups.

Not all segments made the cut. The following were eliminated due to size, lack of unique characteristics, or overlap:

- Classic Touring
- Rejuvenation Seekers
- Heritage Enthusiasts
- Low & Average Spenders
- Cottagers

Other dimensions considered but did not yield relevant results included: age (other than the young segment), mode of travel, travelling with friends, and new and repeat visitors.

There are many ways to approach segmentation and results can vary from basic to very detailed and specific. This segmentation exercise involved a top-down approach to help ensure results: resonated with industry partners; provided enough detail to be relevant without being too narrow in focus; and are aligned with tourism product.