

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: Cultural Enthusiasts

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

This bulletin profiles Cultural Enthusiasts, a segment representing 8% of the province's pleasure visitors (See Figure 1). Figure 2 illustrates the segments across three dimensions: segment size (size of the bubbles), average length of stay and average party spend. The chart shows that Cultural Enthusiasts are among the top four high-yield segments with the highest average party spend of \$2,130 and an average length of stay (7.5 nights).

Figure 1: NS Visitor Segments, by Market Share

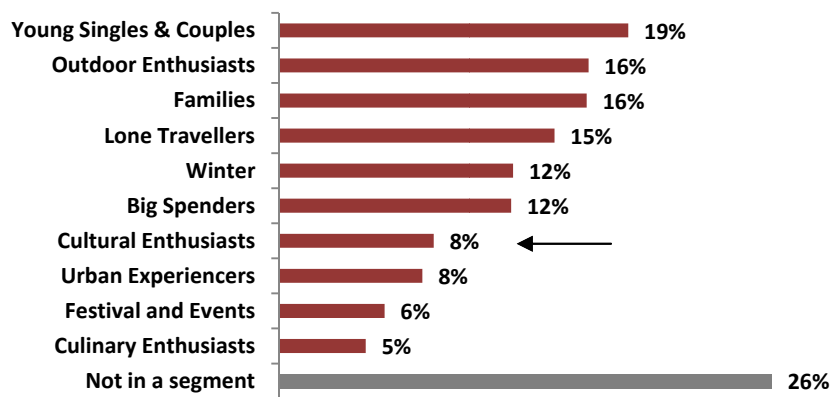
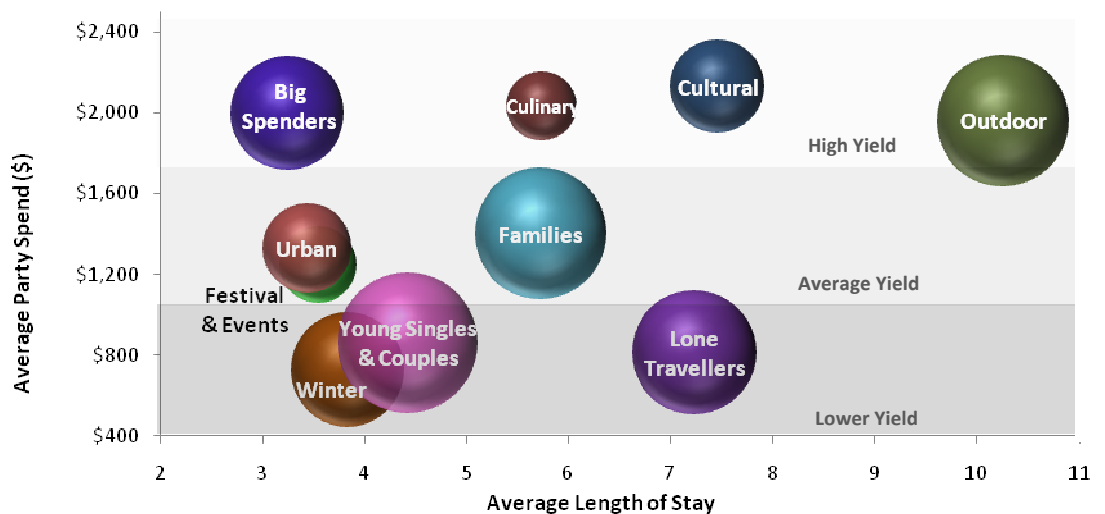


Figure 2: NS Visitor Segments by Yield Band and Length of Stay



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.

Cultural Enthusiasts: Defined

This segment includes pleasure visitors highly motivated by cultural experiences and activities. Cultural Enthusiasts include visitors who: ranked culture and people, heritage and history, and the mix of traditional and contemporary at least 8 out of 10 in importance in their decision to visit Nova Scotia; participated in two or more cultural activities; and have a higher than average spend on Nova Scotia cultural products.

Nova Scotia’s culture is highly regarded by many pleasure visitors, and this is especially true for Cultural Enthusiasts. This group shows interest in cultural attributes aligned with Nova Scotia’s brand position, and has high activity levels in both cultural and outdoor tourism product. Visitor and trip characteristics are noted in Table 1.

Cultural Enthusiasts are primarily comprised of couples (51%) and lone travellers (13%) who have higher levels of education and higher incomes than all pleasure visitors. A higher percentage of Cultural Enthusiasts come from farther away – only 16% reside in the Atlantic region compared to 44% for all pleasure visitors. One-third of Cultural Enthusiasts are from Ontario (33%), 19% are from Western Canada, 18% are American, and 8% are from overseas.

This higher percentage of long-haul visitors means that more Cultural Enthusiasts arrive by air (49% compared to 33% for all pleasure visitors). Higher numbers of long-haul visitors contribute to more first-time visitors; only 19% of pleasure visitors are new to the province compared to 35% of Cultural Enthusiasts.

Nova Scotia’s visitor population includes a large proportion of baby boomers and a smaller but growing number of 20 to 30 year olds. Cultural Enthusiasts are more likely to be mature travellers, especially in the 45+ age categories and fewer travel

parties have young adults and children compared to the average pleasure visitor.

While unique in their motivation to experience Nova Scotia’s culture, Cultural Enthusiasts are similar to Outdoor Enthusiasts and Culinary 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 with tourism product 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 Cultural Enthusiasts include: visiting craft shops (92%), museums and historic sites (87%), and the Halifax Waterfront (70%). Cultural Enthusiasts also show higher participation in outdoor activities (72%) compared to all pleasure visitors (53%).

Cultural Enthusiasts report high trip satisfaction and rank several aspects of their trip higher than any other segment. Culture and people, history and heritage, the seacoast, the outdoors, interests, local food, value for money, and rejuvenation all received above average scores. Sixty-four percent of Cultural Enthusiasts indicated their trip exceeded expectations (the highest score noted by any segment), and 80% suggested they would definitely recommend Nova Scotia to friends and family (see Table 1).

Table 1: Cultural Enthusiasts’ Visitor and Trip Characteristics compare to Pleasure Visitors

	Cultural Enthusiasts	All Pleasure Visitors
Party Composition	Couples, lone travellers	Couples, families, lone travellers
Completed University	53%	51%
Household Income	Over \$80,000: 49%	Over \$80,000: 46%
Accommodation Preferences	Hotels (49%), friends/family (37%), B&Bs (21%), motels (19%)	Hotels (43%), friends/family (42%), motels (12%)
Motivations for Visiting (1-10; 10 being highest)	The seacoast (9.4), culture & people (9.0), landscape and wildlife (9.0), history & heritage (8.8)	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: 64%	Trip exceeded expectations: 39%

Cultural Enthusiasts are more likely to travel with a laptop (50%) and use it to find travel information while here on vacation. Visitors in this segment also use novascotia.com more than average prior to visiting (60% compared to 36% of all pleasure visitors).

Cultural Enthusiasts have higher rates of visiting rural tourism regions; generally they are at least 10 percentage points above the average reported by all pleasure visitors. Cultural Enthusiasts also report average rates of visiting the Halifax region (see Table 3).

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

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

Cultural Enthusiasts' accommodation preferences are similar to pleasure visitors with the exception of Bed & Breakfasts; 21% of these visitors report having stayed in B&Bs, compared to 9% of all pleasure visitors.

As noted in the methodology section, there is overlap between segments due to the characteristics used to create the visitor segments. The largest overlap for Cultural Enthusiasts is with the Outdoor Segment; one-third of Cultural Enthusiasts are also in the Outdoor Enthusiasts. Visitors in three of the high-yield segments are similar in several trip characteristics and interests. Overlap with other segments is minimal.

Table 3: Regions Visited by Cultural Enthusiasts

	Cultural Enthusiasts		All Pleasure Visitors	
	Stopped or Stayed	Stayed Overnight	Stopped or Stayed	Stayed Overnight
Halifax Regional Municipality	80%	70%	76%	65%
South Shore	64%	27%	37%	15%
Fundy Shore & Annapolis Valley	54%	29%	44%	22%
Northumberland Shore	53%	22%	37%	14%
Cape Breton Island	46%	42%	29%	25%
Eastern Shore	13%	5%	9%	4%
Yarmouth & Acadian Shores	7%	4%	7%	3%

Table 4: Average Party Spend

Cultural Enthusiasts have the highest average per party spend of \$2,130 of any of our segments. Below is a detailed breakdown of their expenditures compared to the average pleasure visitor.

	Cultural Enthusiasts	Pleasure Visitors
Accommodations	\$600	\$320
Campgrounds	\$30	\$15
Meals in restaurants, bars	\$460	\$290
Groceries and liquor	\$130	\$110
Gas, auto repair	\$200	\$130
Car rental	\$150	\$100
Taxis, limos	\$15	\$10
Tolls	\$5	\$5
NS cultural products	\$220	\$60
Clothing	\$100	\$80
Shopping	\$80	\$80
Culture and entertainment	\$120	\$60
Sport and recreation	\$20	\$20
Total	\$2,130	\$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.