Economic and Rural Development and Tourism

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: Outdoor Enthusiasts

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

This bulletin profiles Outdoor Enthusiasts, a large segment representing 16% 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 Outdoor Enthusiasts are among the top four high-yield segments (with an average party spend of $1,960) and have the longest average length of stay (10.5 nights).

Figure 1: NS Visitor Segments, by Market Share

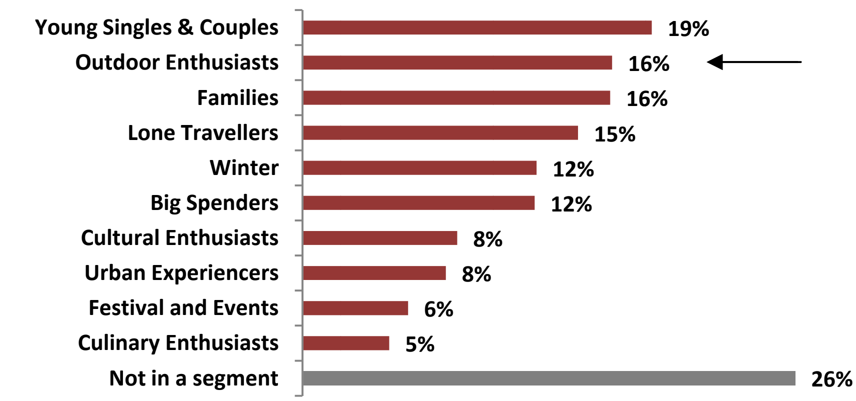
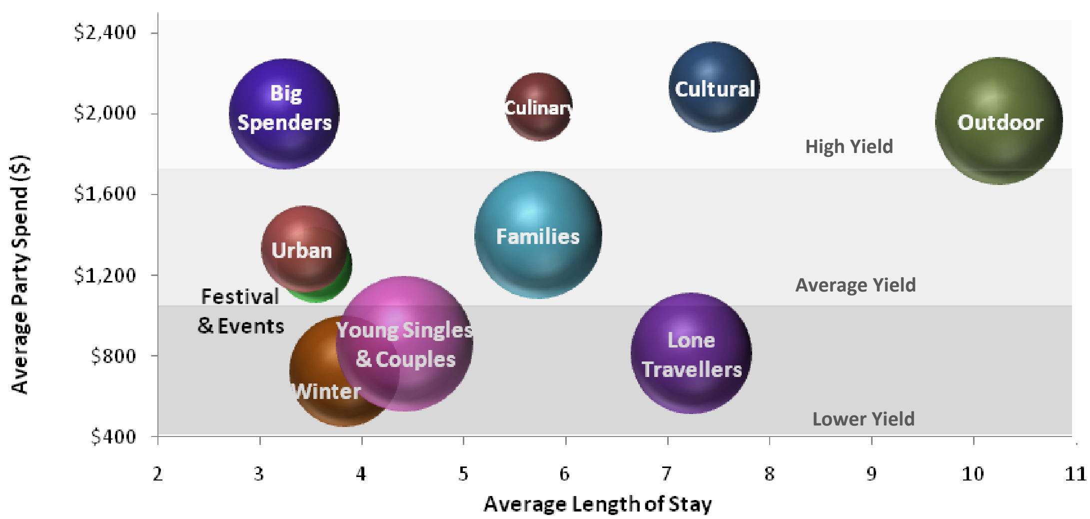


Figure 2: NS Visitor Segments by Yield Band and Length of Stay



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.

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Outdoor Enthusiasts: Defined

This segment highlights pleasure visitors who are highly motivated by outdoor experiences and are engaged in outdoor activities. Outdoor Enthusiasts include visitors who participated in at least 3 outdoor activities, and ranked natural landscapes and wildlife at least an 8 out of 10 in importance in their decision to visit Nova Scotia.

Outdoor activities are popular among visitors to Nova Scotia and this is especially true for Outdoor Enthusiasts. This segment represents 16% of pleasure visitors and although they are highly motivated by Nova Scotia's outdoor product, they are also highly engaged in cultural activities while here. Visitor and trip characteristics are noted in Table 1.

Outdoor Enthusiasts are primarily comprised of couples (46%) and families (22%) who have higher levels of education and higher incomes compared to all pleasure visitors. Outdoor Enthusiasts typically come from farther away. Only 14% of Outdoor Enthusiasts are from the Atlantic Region compared to 44% of all pleasure visitors. Over one-third of Outdoor Enthusiasts are from Ontario (34%), 12% are from Western Canada, 21% are American, and 12% are from overseas. More long-haul visitors result in greater numbers of Outdoor Enthusiasts arriving by air (45% compared to 33% for all pleasure visitors).

Nova Scotia's visitor population includes a large percentage of baby boomers and a smaller but growing amount of 20 to 30 year olds. Outdoor Enthusiasts are similar yet have a slightly higher percentage of younger visitors.

While unique in their high motivation to experience the outdoors, Outdoor Enthusiasts are similar to Cultural Enthusiasts and Culinary Enthusiasts in their activity levels. All three of these high-yield segments have higher than average participation rates in various tourism activities, indicating they are highly engaged in tourism product and keep busy while on vacation. Table 2 illustrates this by comparing participation rates of these three segments to the average pleasure visitor. Outdoor Enthusiasts however have the highest participation rates for outdoor activities including those more physical (and perhaps niche) in nature. Outdoor Enthusiasts show higher participation rates for almost every activity noted, with exception to nightclubs and lounges (which is similar to the average pleasure visitor).

Outdoor Enthusiasts are environmentally oriented, are willing to pay premiums for sustainable tourism product and are more likely to have already incorporated sustainable choices into their travel decisions. As well, they are more likely to use a laptop to find travel information while here on vacation (50% travel with one). Outdoor Enthusiasts also visit novascotia.com more than average prior to visiting.

Outdoor Enthusiasts tend to either stay with friends or family or in hotels while here. They also report higher rates for camping or renting cottages compared to all pleasure visitors (see Table 1). Outdoor Enthusiasts report travelling the province to a greater extent compared to the average pleasure

Table 1: Outdoor Enthusiasts' Visitor and Trip Characteristics compared to Pleasure Visitors

	Outdoor Enthusiasts	All Pleasure Visitors
Party Composition	Couples, families	Couples, families, lone travellers
Completed University	64%	51%
Household Income	Over $80,000: 54%	Over $80,000: 46%
Accommodation Preferences	Friends/family (42%), hotels (38%), campgrounds (20%), rented cottages (13%)	Hotels (43%), friends/family (42%), motels (12%)
Top Motivations for Visiting (1-10; 10 being highest)	Landscape & wildlife (9.4), seacoast (9.3), do interesting things (8.3), culture & people (8.1), rejuvenation (7.9)	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: 54%	Trip exceeded expectations: 39%

visitor. Generally, Outdoor Enthusiasts are at least 10 percentage points above the average reported by all pleasure visitors. Outdoor Enthusiasts report above average rates of visiting the Halifax region (see Table 3).

Pleasure visitors to Nova Scotia have a high rate of repeat visitation with 81% previously having visited the province. Thirty-three percent of Outdoor Enthusiasts have not previously visited compared to 19% of all pleasure visitors.

A high percentage of Outdoor Enthusiasts visit Nova Scotia from June to September (88% compared to 63% of all pleasure visitors). Consequently, winter activities are not among the top outdoor activities reported by visitors in this segment as shown in Table 2.

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

Activities	Outdoor Enthusiasts	Cultural Enthusiasts	Culinary Enthusiasts	All Pleasure Visitors
Outdoor Activities	100%	72%	63%	53%
Beach exploring	81%	45%	37%	24%
Hiking	75%	37%	40%	23%
Coastal sightseeing	71%	50%	39%	27%
Nature observing	63%	32%	19%	17%
Swimming/sunbathing	53%	23%	15%	16%
Whale watching	32%	16%	11%	7%
Sail/boat tour	19%	10%	5%	5%
Kayaking	13%	3%	4%	3%
Canoeing	11%	2%	2%	3%
Hunting/fishing	11%	2%	1%	2%
Cycling	10%	2%	5%	2%
Cultural Activities				
Craft shops/studios	64%	92%	57%	40%
Museums	62%	87%	52%	36%
Halifax Waterfront	57%	70%	64%	50%
Parks, fossils, geo sites	48%	38%	33%	20%
Farms/food producers	32%	36%	82%	18%
Music performances	30%	28%	23%	18%
Nightclubs/lounges	29%	37%	38%	27%
Art galleries	27%	49%	24%	14%

As noted in the methodology section, there is overlap between the segments due to the characteristics used to create the visitor segments. The largest overlap for Outdoor Enthusiasts is with the family segment; 22% of Outdoor Enthusiasts are families. Two other segments with this group are Cultural Enthusiasts and Young Singles and Couples.

Table 3: Regions Visited by Outdoor Enthusiasts

	Outdoor Enthusiasts		All Pleasure Visitors	
	Stopped or Stayed	Stayed Overnight	Stopped or Stayed	Stayed Overnight
Halifax Regional Municipality	72%	56%	76%	65%
South Shore	58%	28%	37%	15%
Fundy Shore & Annapolis Valley	57%	39%	44%	22%
Northumberland Shore	56%	25%	37%	14%
Cape Breton Island	53%	45%	29%	25%
Eastern Shore	18%	8%	9%	4%
Yarmouth & Acadian Shores	11%	4%	7%	3%

Table 4: Average Party Spend

Outdoor Enthusiasts have an average party spend of $1,960 compared to $1,280 for all pleasure visitors. Below is a detailed breakdown of their expenditures.

	Outdoor Enthusiasts	Pleasure Visitors
Accommodations	$500	$320
Campgrounds	$30	$15
Meals in restaurants, bars	$390	$290
Groceries and liquor	$200	$110
Gas, auto repair	$220	$130
Car rental	$200	$100
Taxis, limos	$10	$10
Tolls	$5	$5
NS cultural products	$110	$60
Clothing	$80	$80
Shopping	$80	$80
Culture and entertainment	$90	$60
Sport and recreation	$45	$20
Total	**$1,960**	**$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.