

## Nova Scotia Tourism Market Profile: Visiting Friends & Relatives

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

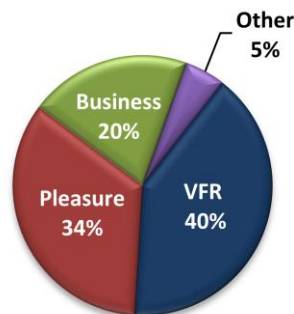
This bulletin profiles visitors who travel to Nova Scotia to visit friends and relatives (VFR). VFR is Nova Scotia's largest visitor segment. As shown in Figure 1, 40% of visitors to Nova Scotia come here to visit friends and relatives, followed closely by those travelling for pleasure.

At a high level, there are two reasons VFR visitors travel to NS; half come solely for the purpose of visiting with friends and relatives and the other half combine their visit with pleasure (Figure 2). The majority (84%) of those who combine their trip with pleasure suggest they travel for the shared reason of seeing friends and relatives and experience the province, while the remainder visit with friends for only a short period and spend the majority of their trip travelling the province.

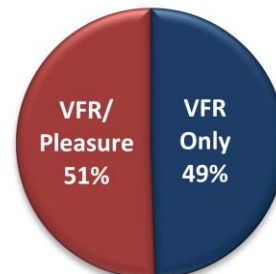
The 2010 Visitor Exit Survey can be found at [www.gov.ns.ca/econ/tourism/research/reports](http://www.gov.ns.ca/econ/tourism/research/reports)

In general, VFR visitors tend to stay longer than the average visitor yet spend less. Figure 3 compares the two types of VFR visitors with who are visiting for pleasure (only) by their length of stay, the amount of money they spend while on their Nova Scotian trip (yield), and number of visitors belonging to each group (bubble size). It shows that while pleasure visitors have the highest yield, visitors who combined their VFR trip with pleasure spend more and stay longer

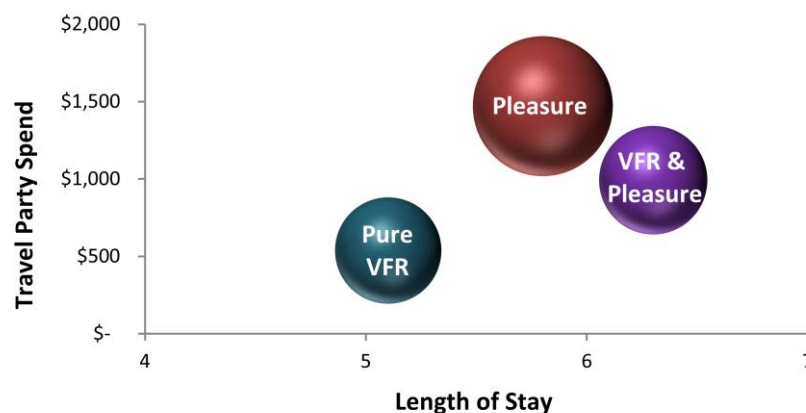
**Figure 1: Reasons to Visit NS**



**Figure 2: Two types of VFR Travellers to NS**



**Figure 3: VFR and Pleasure Visitors by Yield and Length of Stay**



**Contact us:**  
 Tourism Research  
 Economic and Rural  
 Development and  
 Tourism  
 902.424.3958  
[crouselg@gov.ns.ca](mailto:crouselg@gov.ns.ca)

**Table 1: Regions Visited**

Tourism Regions	VFR Visitors				Pleasure Visitors	
	Stopped or Stayed		Stayed Overnight		Stopped or Stayed	Stayed Overnight
	Pure VFR	VFR/Pleasure	Pure VFR	VFR/Pleasure		
Halifax Regional Municipality	74%	79%	61%	65%	76%	65%
South Shore	18%	38%	11%	11%	37%	15%
Fundy Shore & Annapolis Valley	34%	45%	18%	19%	44%	22%
Northumberland Shore	20%	32%	9%	11%	37%	14%
Cape Breton Island	8%	20%	5%	15%	29%	25%
Eastern Shore	4%	8%	2%	2%	9%	4%
Yarmouth & Acadian Shores	4%	6%	2%	3%	7%	3%

than those visiting only to see friends or relatives. In many ways, the VFR/pleasure visitor resembles the pleasure only visitor more closely than those visiting to only visit friends or relatives.

**Table 2: Activity Comparison between Pure VFR, VFR/Pleasure, and Pleasure Visitors**

Activities	Pure VFR	VFR/Pleasure	Pleasure Visitors
<b>Cultural Activities</b>			
Halifax Waterfront	24%	51%	50%
Museums	8%	31%	41%
Craft shops/studios	16%	41%	40%
Parks, fossils, geo sites	5%	16%	23%
Nightclubs/lounges	20%	29%	27%
Art galleries	5%	13%	14%
Farms/food producers	11%	22%	17%
Music performances	8%	16%	20%
Guided tours	1%	6%	10%
Festivals/events/fairs	6%	13%	14%
Winery	2%	7%	9%
<b>Outdoor Activities</b>			
Coastal sightseeing	6%	27%	28%
Hiking	9%	23%	24%
Beach exploring	9%	28%	23%
Nature observing	5%	17%	18%
Whale watching	1%	4%	10%
Swimming/sunbathing	10%	19%	15%
Sail/boat tours	1%	5%	6%

One similarity shared between VFR/pleasure and pleasure visitors is their propensity to travel the province. Pleasure visitors travel the province more extensively, covering more distance as they search for a variety of experiences, while pure VFR visitors report traveling less. Table 1 compares in-province travel within these three groups of travellers.

In general, VFR visitors are more likely to visit year-round while pleasure visitation peaks during the summer months. This general trend also extends to comparisons between pure VFR and those combining VFR with pleasure. Twenty-seven percent of pure VFR visitors travel to Nova Scotia during July and August, compared to 41% of those here combining pleasure with seeing friends and families.

VFR/pleasure visitors also resemble pure pleasure visitors in their activity level while here. As shown in Table 2, these two groups of visitors report similar participation rates for most activities noted; in some cases VFR/pleasure report slightly higher participation rates than pure pleasure (visiting local farms or food producers, night clubs, beach exploring and swimming/sunbathing). In contrast, pure VFR visitor report significantly lower levels of activities.

**Table 3: Average Party Spend Comparison – VFR and Pleasure Visitors**

	Pure VFR	VFR & Pleasure	Pleasure
Accommodations	\$60	\$150	\$320
Campgrounds	\$0	\$0	\$15
Meals in restaurants, bars	\$130	\$250	\$290
Groceries and liquor	\$75	\$110	\$110
Gas, auto repair	\$75	\$115	\$130
Car rental	\$30	\$65	\$100
Taxis, limos	\$5	\$10	\$10
Tolls	\$5	\$5	\$5
NS cultural products	\$15	\$50	\$60
Clothing	\$60	\$95	\$80
Shopping	\$60	\$85	\$80
Culture and entertainment	\$10	\$40	\$60
Sport and recreation	\$5	\$15	\$20
<b>Total</b>	<b>\$540</b>	<b>\$995</b>	<b>\$1,280</b>

As noted, VFR visitors tend to spend less money while on vacation compared to other visitors, mainly because savings on accommodations and meals. On average, VFR visitors spend \$775 while here, compared to pleasure visitors who spend significantly more (\$1,280). Table 3 provides detailed spending profiles for both groups of VFR visitors and pleasure visitors. It shows that pure VFR visitors spend the least while here and lower spending is consistent across all categories. While VFR/pleasure visitors spend 30% less than pleasure visitors, most of this difference is attributable to lower spending in accommodations. With the exception of accommodations and slightly less being spent on meals in restaurants and on car rentals,

spending levels between these two groups are otherwise similar.

VFR and pleasure visitors report similar levels of trip satisfaction and likelihood to recommend Nova Scotia to others. VFR visitors reported their trip satisfaction as a 9.3 out of 10, while pleasure visitors' average satisfaction rating was slightly lower at 9.1. Likelihood to recommend was 9.4 for VFR and 9.3 for pleasure visitors. Little differences were reported by VFR and VFR/pleasure visitors.

Satisfaction ratings with specific trip aspects varied in some cases quite significantly between these three

### Visiting Friends and Relatives and Nova Scotia's 10 Visitor Segments

Comparing VFR and pleasure is one way to view visitors and their trip characteristics. Nova Scotia has 10 visitor segments, and examining the percentage of VFR and pleasure visitors adds another dimension to view the segments. Below the segments are grouped according to their % of VFR. Visit [www.gov.ns.ca/econ/tourism/research/reports](http://www.gov.ns.ca/econ/tourism/research/reports) for more information on each visitor segment.

#### High % of VFR Visitors

Lone Travellers  
Winter Segment

#### Average % of VFR Visitors

Culinary Enthusiasts  
Young Singles & Couples  
Families with Children

#### Low % of VFR Visitors

Cultural Enthusiasts  
Outdoor Enthusiasts  
Big Spenders

Note: As the definitions for the Urban and Festival & Event Segments does not include visitors who combined their VFR trip with pleasure, they do not appear in the above

**Table 4: Motivation and Satisfaction Ratings for VFR, VFR/Pleasure and Pleasure Visitors**

Ratings (Out of 10)	Importance in Decision to Visit			Satisfaction with Trip		
	Pure VFR	VFR/ Pleasure	Pleasure	Pure VFR	VFR/ Pleasure	Pleasure
Value for money	5.0	6.4	6.5	7.4	7.6	7.5
Weather	5.3	6.3	6.6	7.6	7.9	8.0
Interests & hobbies	4.8	6.5	6.9	7.5	8.0	8.2
Visit friends/family	9.7	9.6	5.1	9.7	9.7	7.5
Interesting activities	5.1	7.1	7.2	7.5	8.2	8.3
Culture & people	5.6	7.1	6.9	8.0	8.4	8.3
Heritage & history	4.4	6.3	6.4	7.3	7.9	8.0
Mix of traditional & contemporary	4.1	5.6	5.4	7.1	7.5	7.6
Landscapes & wildlife	5.4	7.6	7.5	8.0	8.6	8.6
City/country within reach	5.0	6.8	6.2	7.7	8.2	7.9
Local NS wine	2.9	3.5	3.1	5.8	6.1	5.7
Seacoast	5.7	7.9	7.7	8.2	8.9	8.8
Rejuvenate	5.8	7.2	6.9	7.9	8.2	8.2
Local NS food	5.3	6.9	6.3	7.9	8.2	7.9

groups of visitors. Much of this difference is likely attributable to the different trip motivations behind each trip since fewer pure VFR visitors would have participated in vacation activities compared to pleasure visitors. As such, it makes sense that fewer pure VFR visitors are motivated by experiencing aspects that make up a rich Nova Scotian experience (see Table 4). VFR/pleasure visitors provided similar responses compared to pure pleasure visitors; in some cases rankings were slightly higher.

Both VFR and VFR/Pleasure visitors are more likely to have visited the province previously when compared to

pleasure visitors. Ninety-eight percent of pure VFR have visited the province previously, as have 90% of VFR/pleasure visitors. Seventy-six percent of pleasure visitors have travelled here in the past.

The amount of time between deciding to visit and the departure date (or travel planning time) is another distinction between VFR and pleasure travellers. Pure VFR report the shortest travel planning time; almost 50% decide to travel within 4 weeks prior to travelling (Table 5). VFR/pleasure visitors report somewhat shorter trip planning periods with 38% deciding to travel with 4 weeks prior to departure, and pure pleasure reported the longest with only 31% doing the same.

The use of electronic devices to find travel information while in the province also differs greatly between these groups of visitors. Pure VFR visitors report the lowest usage of Smartphones, GPS units or laptops (49%). VFR/pleasure and pleasure visitors reported similar usage of electronic devices with 63% and 67% doing so (respectfully). Laptops were the most popular device used, followed by GPS and Smartphones.

**Table 5: Travel Planning Period**

Timeframe	Pure VFR	VFR & Pleasure	Pleasure Visitors
Less than 2 weeks before departure	29%	18%	17%
2-4 weeks prior to departure	19%	18%	14%
1-2 months prior to departure	24%	24%	22%
3-4 months prior to departure	13%	18%	20%
5-6 months prior to departure	6%	8%	9%
More than 6 months	8%	13%	16%