

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: Winter Travellers

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

This bulletin profiles Winter Travellers, a segment representing 12% 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 Winter Travellers are among the three lower yield segments, spending an average of \$725 per party while in Nova Scotia and have a below average length of stay (3.8 nights).

Figure 1: NS Visitor Segments, by Market Share

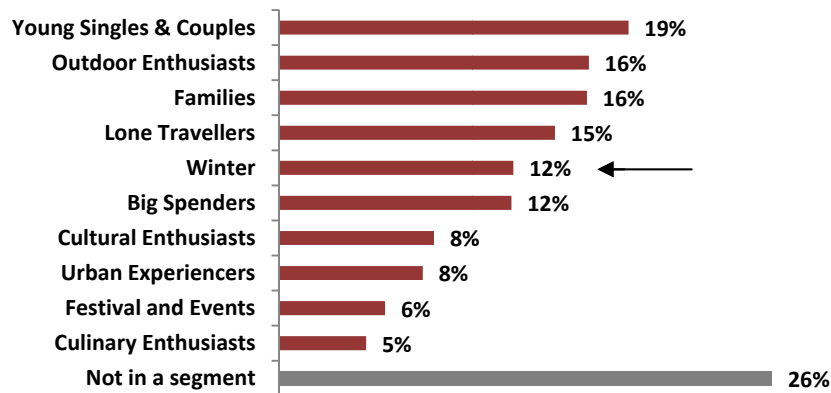
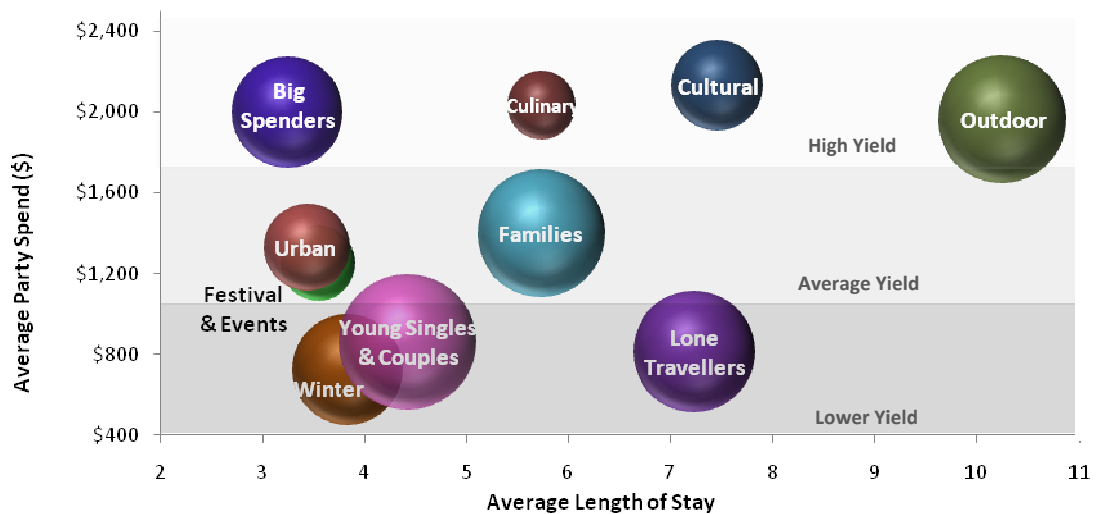


Figure 2: NS Visitor Segments by Yield Band and Length of Stay



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.

Winter Travellers: Defined

Winter Travellers include pleasure visitors who travelled from December through March, excluding visitors who travelled here to attend a festival, special or public event, music concert or sporting event (these visitors are represented by the Festival and Event segment and travel is determined by the festival or event).

Visitors in the Winter Traveller segment report having the shortest trip length and lowest yield of any of Nova Scotia’s visitors segments, as shown in Figure 1. Winter Travellers is the only segment to be defined using time of visit. This segment has the highest number of visitors that did not overlap with the other nine segments. It bears mentioning that although there are no segments specifically dedicated to summer visitation, the bulk of trips in most segments occur during the peak summer months. Visitor and trip characteristics are noted in Table 1.

The majority of Winter Travellers to Nova Scotia are from New Brunswick and Prince Edward Island; 77% are from the Atlantic Provinces compared to only 44% of all pleasure visitors. Only 5% of Winter Travellers are from outside of Canada.

With the higher proportion of visitors from the Atlantic region, visitors within this group are more characteristic of short-haul travellers with shorter trip lengths, lower spend, a higher percentage travelling by car, and a small percentage of first-time visitors.

As noted in the methodology section, those who combine a visit with friends or relatives (VFR) with pleasure are included in the segmentation analysis. Winter travellers are significantly more likely to be combining pleasure with visiting friends and family;

48% combine pleasure with visiting friends and relatives, compared to 39% of all pleasure visitors.

Accommodation preferences of Winter Travellers are influenced by a high percentage VFR travel. Winter Travellers are generally split between staying with friends or relatives (51%) and staying in hotels (45%), as shown in Table 1.

The main reasons Winter Travellers visited Nova Scotia include visiting friends and relatives (as noted) and to rejuvenate, and these trip aspects received top satisfaction scores. Overall, trip satisfaction levels reported by Winter Travellers were either average or below average; 31% suggested their Nova Scotian trip exceeded expectations while 39% of all pleasure visitors reported the same. Trip aspects receiving lower than average scores included: nature and wildlife, the seacoast, heritage and history, as well as weather.

Winter Travellers reported below average participation in outdoor and cultural activities while here on vacation, with the exception of visiting night clubs and pubs which received above average scores. Participation in winter activities (downhill and cross-country skiing, snowboarding and snowmobiling) was also low with 1-2% of winter travellers participating in these activities.

Travel to the tourism regions was concentrated

Table 1: Winter Travellers Visitor and Trip Characteristics compared to Pleasure Visitors

	Winter Travellers	All Pleasure Visitors
Party Composition	Couples, lone travellers	Couples, families, lone travellers
Completed University	50%	51%
Household Income	Over \$80,000: 43%	Over \$80,000: 46%
Accommodation Preferences	Friends/family (51%), hotels (45%), motels (6%)	Hotels (43%), friends/family (42%), motels (12%)
Motivations for Visiting (1-10; 10 being highest)	Friends/family (7.8), rejuvenation (7.0), do interesting things (6.8)	Seacoast (7.7), landscape & wildlife (7.5), do interesting things (7.1)
Satisfaction Ratings	Trip exceeded expectations: 31%	Trip exceeded expectations: 39%

around the Halifax region; 85% of Winter Travellers indicated they visited Halifax and 80% spent at least one night there. Travel to regions outside Halifax was significantly lower for most regions (see Table 3).

Winter Travellers report lower spending in every major spending category with the exception of clothing purchases, and New Brunswick and PEI visitors typically report higher spending on clothing. Winter Travellers spend on average \$725 per party

while in the province, which is the lowest reported by any visitor segment. See Table 4 for detailed spending information.

Winter Travellers are less likely to consult the internet to plan their trip prior to visiting, and are somewhat less likely to use electronic devices to find travel information while they are in the province.

Table 2: Activity Rate Comparison for Winter Travellers to All Pleasure Visitors

Activities	Winter Travellers	Pleasure Visitors
Cultural Activities		
Nightclubs/lounges	36%	27%
Halifax Waterfront	35%	50%
Craft shops/studios	21%	40%
Casino	17%	13%
Museums	14%	36%
Music performances	12%	18%
Art galleries	7%	14%
Parks, fossils, geo sites	5%	20%
Outdoor Activities	24%	53%
Hiking	11%	23%
Coastal sightseeing	7%	27%
Beach exploring	6%	24%
Nature observing	7%	17%
Outdoor sporting events	3%	6%

As noted in the methodology section, there is some overlap between the segments due to the characteristics used to create the visitor segments. The largest overlap for Winter Travellers is with Young Singles & Couples (those 35 years and under) and visitors in the Lone Travellers segment.

Table 3: Regions Visited by Winter Travellers

	Winter Travellers		All Pleasure Visitors	
	Stopped or Stayed	Stayed Overnight	Stopped or Stayed	Stayed Overnight
Halifax Regional Municipality	85%	80%	76%	65%
Fundy Shore & Annapolis Valley	36%	14%	44%	22%
Northumberland Shore	19%	4%	37%	14%
South Shore	15%	6%	37%	15%
Cape Breton Island	5%	4%	29%	25%
Yarmouth & Acadian Shores	2%	2%	7%	3%
Eastern Shore	1%	0%	9%	4%

Table 4: Average Party Spend

Winter Travellers have an average party spend of \$725 compared to \$1,280 for all pleasure visitors. Below is a detailed breakdown of their expenditures.

	Winter Travellers	Pleasure Visitors
Accommodations	\$147	\$320
Campgrounds	\$0	\$15
Meals in restaurants, bars	\$185	\$290
Groceries and liquor	\$65	\$110
Gas, auto repair	\$75	\$130
Car rental	\$20	\$100
Taxis, limos	\$10	\$10
Tolls	\$5	\$5
NS cultural products	\$20	\$60
Clothing	\$100	\$80
Shopping	\$60	\$80
Culture and entertainment	\$35	\$60
Sport and recreation	\$5	\$20
Total	\$725	\$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.