



NARRATIVE
RESEARCH

2024 US Consumer Research Presentation of Results

January 2025

Prepared for:



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Methodology



Mode: Online survey



Audience: Travellers from the *Mid-Atlantic* and *New England* regions of the United States



Completes: 2,415 travellers
(*Mid-Atlantic: 1,215 & New England: 1,200*)



Data Collection Dates:
October 15 – 21, 2024



Average Completion Time:
15.7 minutes



Key Objectives:

- To better understand the travel habits of Americans living in the Mid-Atlantic and New England regions.
- Assess reactions to the marketing campaigns for each Atlantic province and their impact on travel intentions.

Qualifiers:

To qualify, all participants needed to hold a valid passport AND:

- Have taken at least one vacation trip of at least 2 nights outside their home state during the past 3 years (with at **least 1 night spent in paid accommodation**); *or*
- Have definite plans to take such a trip over the next year.

Soft quotas were put in place for age, gender and region and weighting applied to final data set.



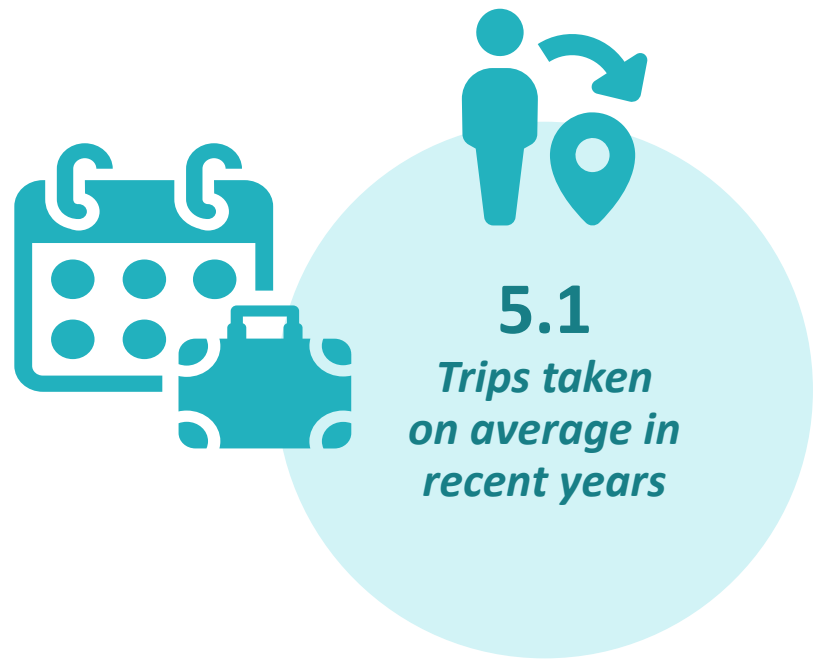


Travel Activities & Intentions



Travel Activities

Nearly all US travellers surveyed have taken a recent out of state vacation. On average, travellers took more than five vacations over the last three years.





Travel Activities

Travel has extended well beyond US borders, and close to half of travellers surveyed have visited Canada in the past three years.



Top Destinations Travelled in Recent Years

- 47% Within the United States
- 45% Canada**
- 30% Europe
- 28% Caribbean/Bermuda
- 21% Australia
- 20% Central America
- 20% Mexico

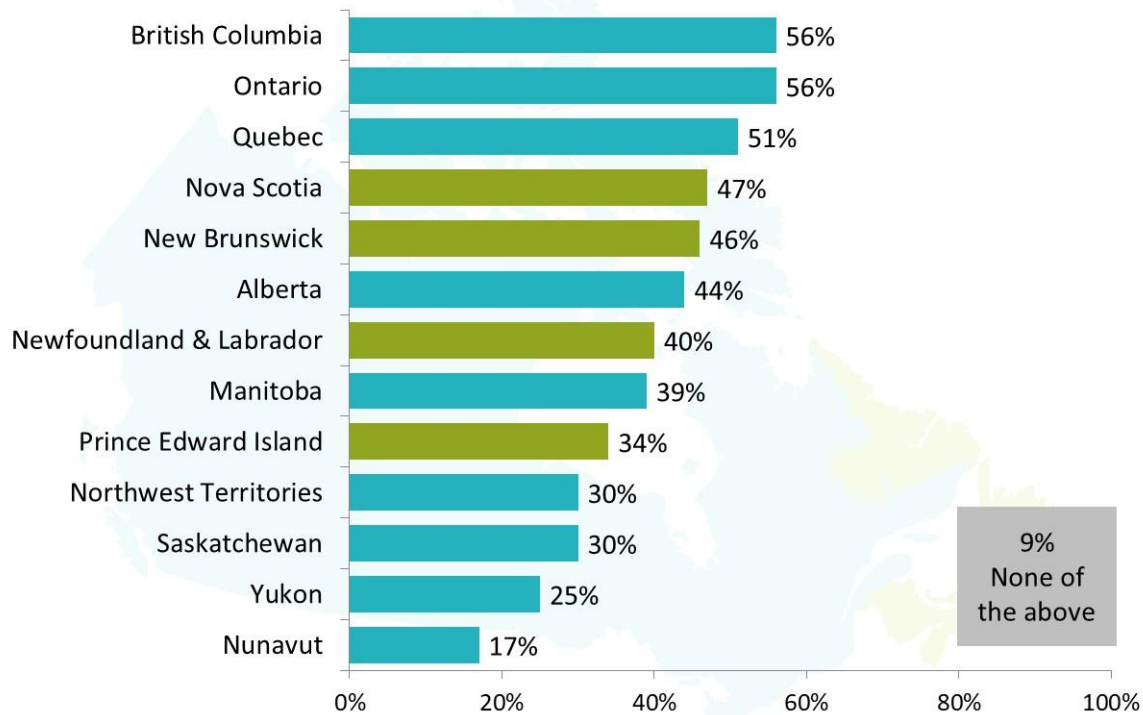


Awareness & Familiarity

Looking at the US travellers' market overall, awareness is strongest for British Columbia, Ontario, and Quebec...

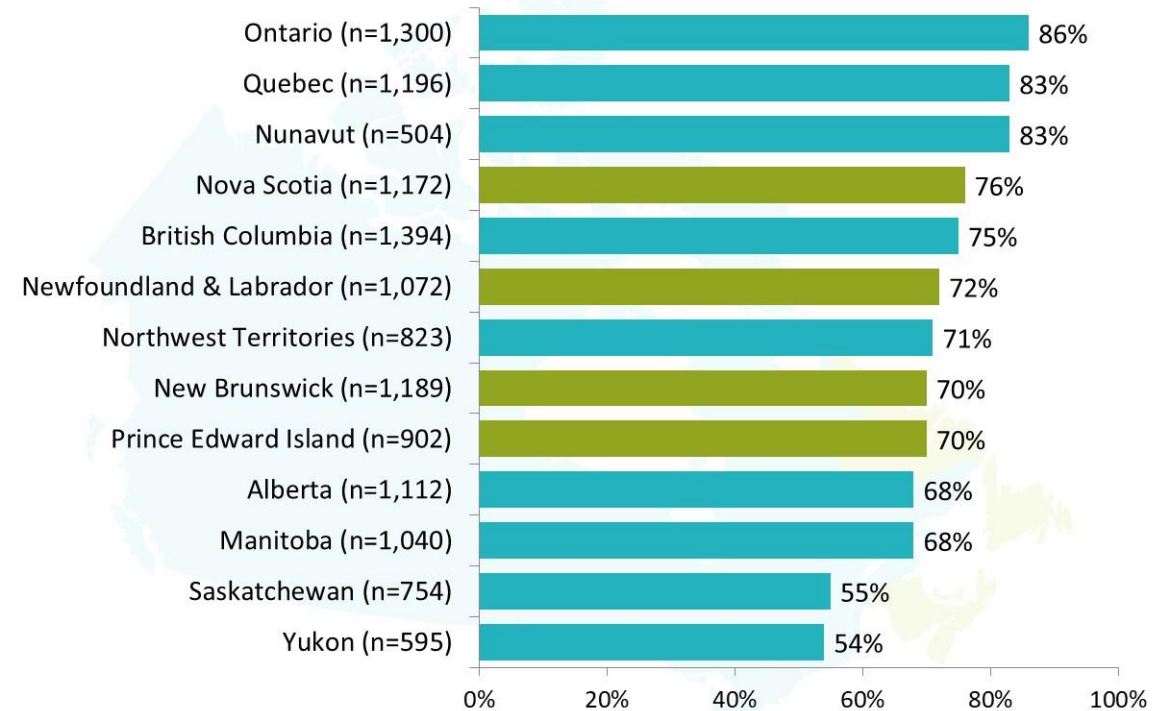
...and travellers aware of each province/territory tend to be largely familiar with the respective offerings.

Awareness of Provinces Among US Travellers



Familiarity of Provinces Among US Travellers

Among Those Aware



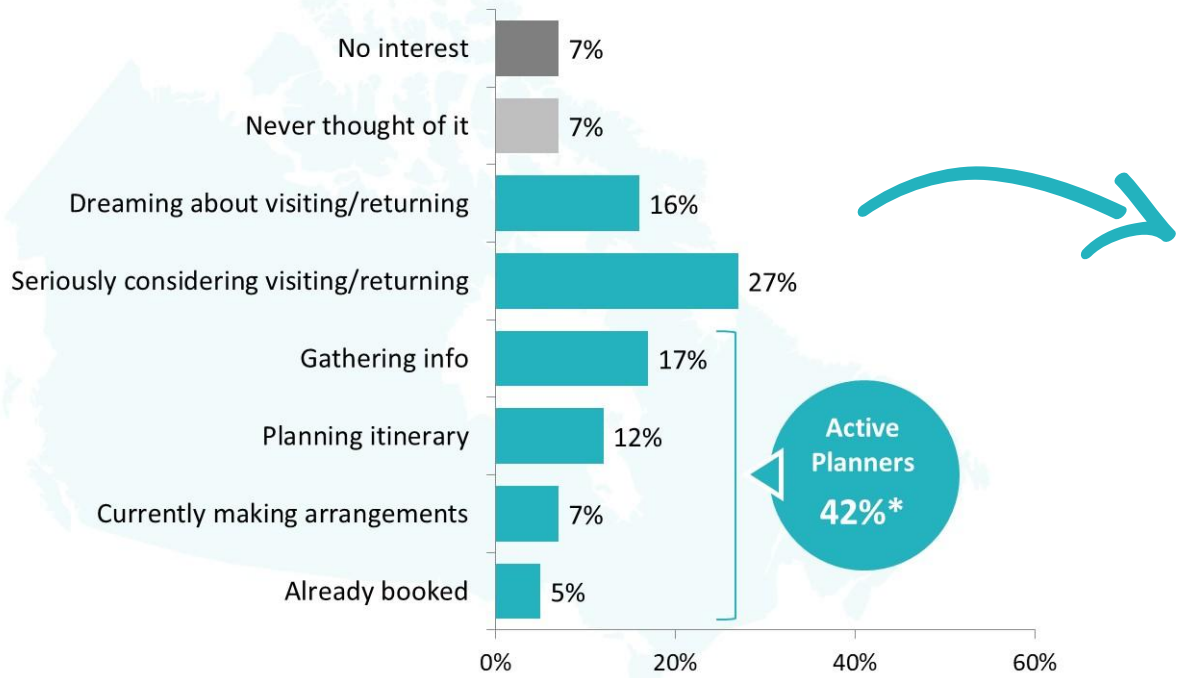


Travel Intentions (pre-ads)

There are strong intentions to visit Canada within the next two years. Of those, visitation likelihood is similar across Atlantic provinces. Less than half of travellers are actively planning a trip to Canada in next two years.

Intentions to Visit Canada in Next 2 Years

Total Aided Mentions



% Likely to Visit Each Atlantic Province

Among Those Open to Taking a Canadian Trip





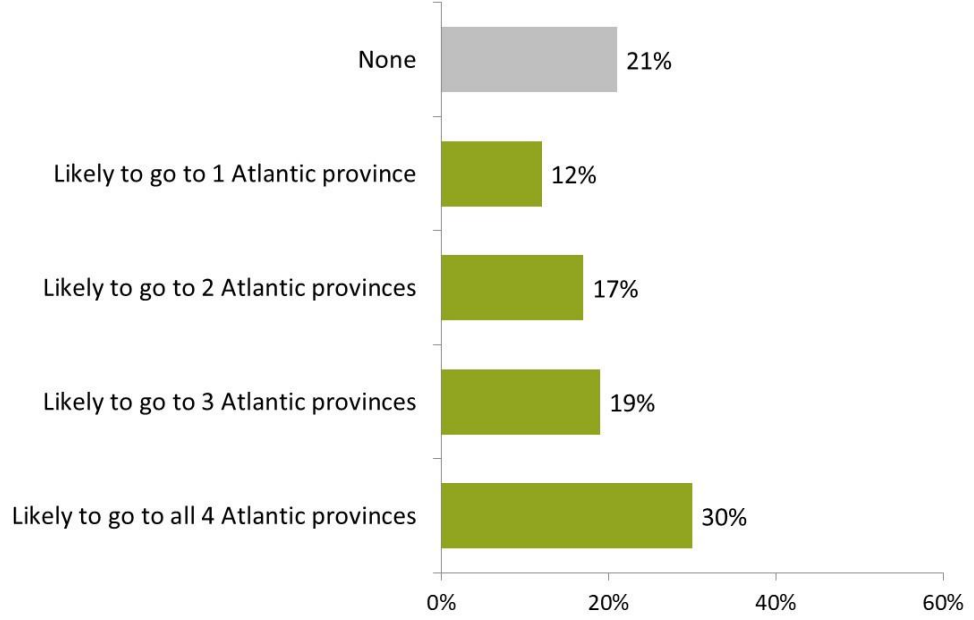
Travel Intentions (pre-ads)

A clear majority of US travellers are likely to consider visiting the Atlantic provinces over the next two years.



Likely to Consider Atlantic Canada Vacation

% Definitely/Probably Likely to Consider Visiting



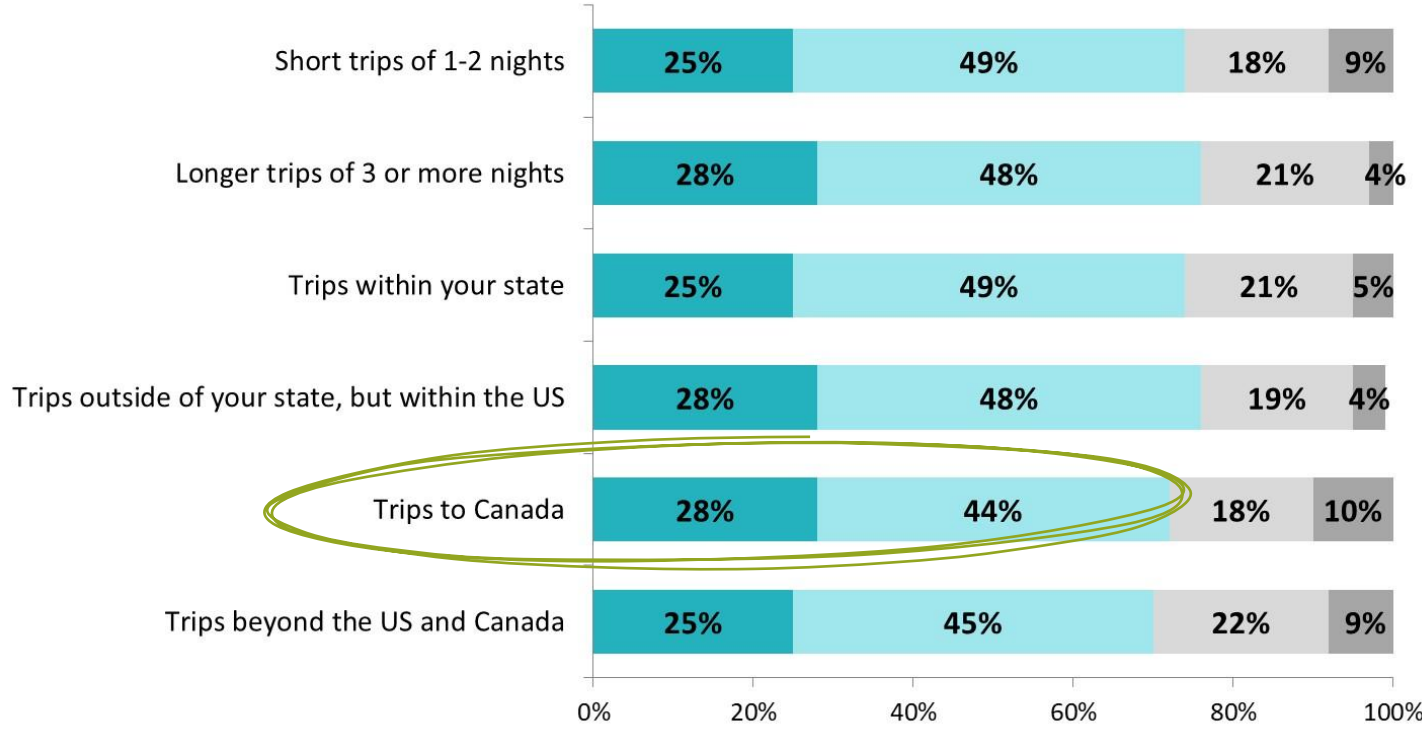


Future Travel Intentions (pre-ads)

US travellers' appetite for travel is expected to continue.

Future Travel Intentions

■ Taking more trips ■ Taking the same number of trips ■ Taking fewer trips ■ I never take these types of trips









Travel Intentions (pre-ads)

Lack of familiarity is the most common barrier for considering Atlantic Canada as a vacation destination.

Barriers to Considering Atlantic Canada as a Vacation Destination

Among Those Not Likely to Consider Travel to Atlantic Provinces

	 NB	 NL	 NS	 PEI
Sample size (n)	n=315	n=354	n=261	n=277
Unfamiliar/Don't know much about it	17%	20%	11%	18%
Not interested/No personal desire	9%	8%	12%	8%
Distance/Too far away	7%	8%	9%	8%
Nothing to do there/Boring destination	4%	2%	2%	4%
Price/Expensive	3%	4%	4%	3%
Climate/Weather conditions	3%	5%	5%	4%
Other preferred destinations/take priority	3%	3%	3%	4%
Time constraints/No time for vacation	1%	2%	2%	1%
Transportation limitations/Not sure how to get there	1%	2%	1%	1%
Other	6%	6%	6%	5%
Nothing is keeping me from considering it	3%	1%	6%	4%
Don't know/Unsure	49%	46%	45%	44%





Travel Planning

Peak season spans five months, with May to September being identified as peak travel months for an Atlantic Canada vacation.





Preferred Travel Months

May, June, July, August & September



Month Likely to Consider Visiting Atlantic Canada

Among Those Likely to Consider Travel to Atlantic Provinces

	 NB	 NL	 NS	 PEI
Sample size (n)	n=2,100	n=2,061	n=2,154	n=2,138
Peak Seasons				
May	19%	20%	20%	16%
June	22%	23%	25%	24%
July	23%	25%	27%	26%
August	19%	21%	23%	21%
September	15%	17%	20%	17%














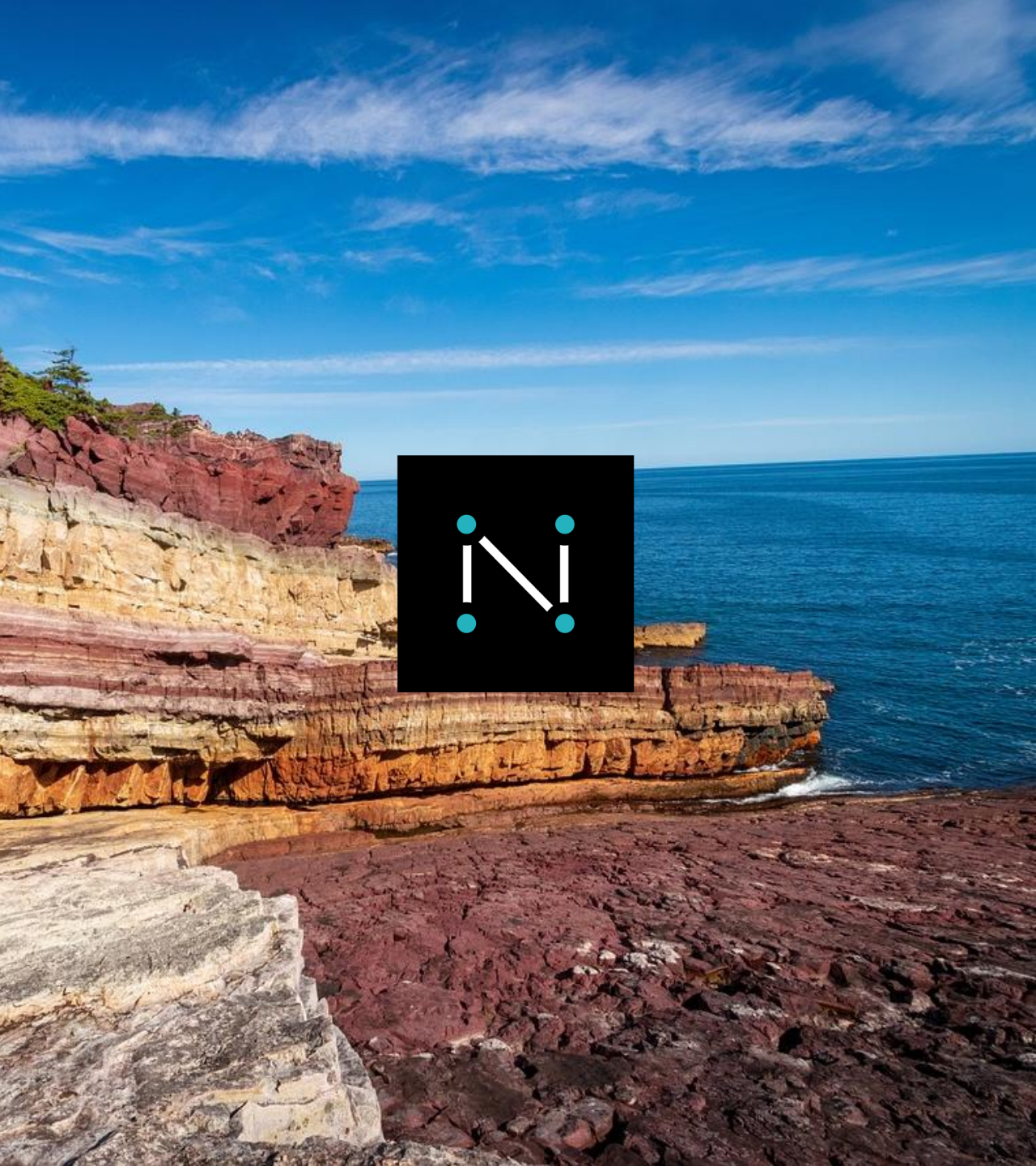
Travel Planning

Air travel continues to be the most common anticipated mode of transportation to Atlantic Canada for vacation, especially for those living in the Mid-Atlantic.

Modes of Travel

Among Those Likely to Consider Travel to Atlantic Provinces

		NB		NL		NS		PEI
	Mid-Atlantic	New England	Mid-Atlantic	New England	Mid-Atlantic	New England	Mid-Atlantic	New England
Sample size (n)	n=1,007	n=1,093	n=983	n=1,078	n=1,044	n=1,110	n=1,026	n=1,112
Air 	66%	47%	59%	43%	60%	39%	56%	41%
Car 	22%	32%	22%	29%	24%	33%	22%	27%
Cruise ship 	14%	26%	18%	30%	17%	27%	16%	24%
Ferry 	6%	16%	10%	21%	9%	20%	10%	22%
Recreational vehicle (RV) 	5%	10%	6%	12%	6%	14%	4%	11%
Motor coach 	5%	15%	6%	17%	7%	18%	7%	16%
Motorcycle 	4%	11%	6%	15%	6%	13%	5%	11%
Don't know	9%	9%	10%	10%	8%	8%	10%	10%



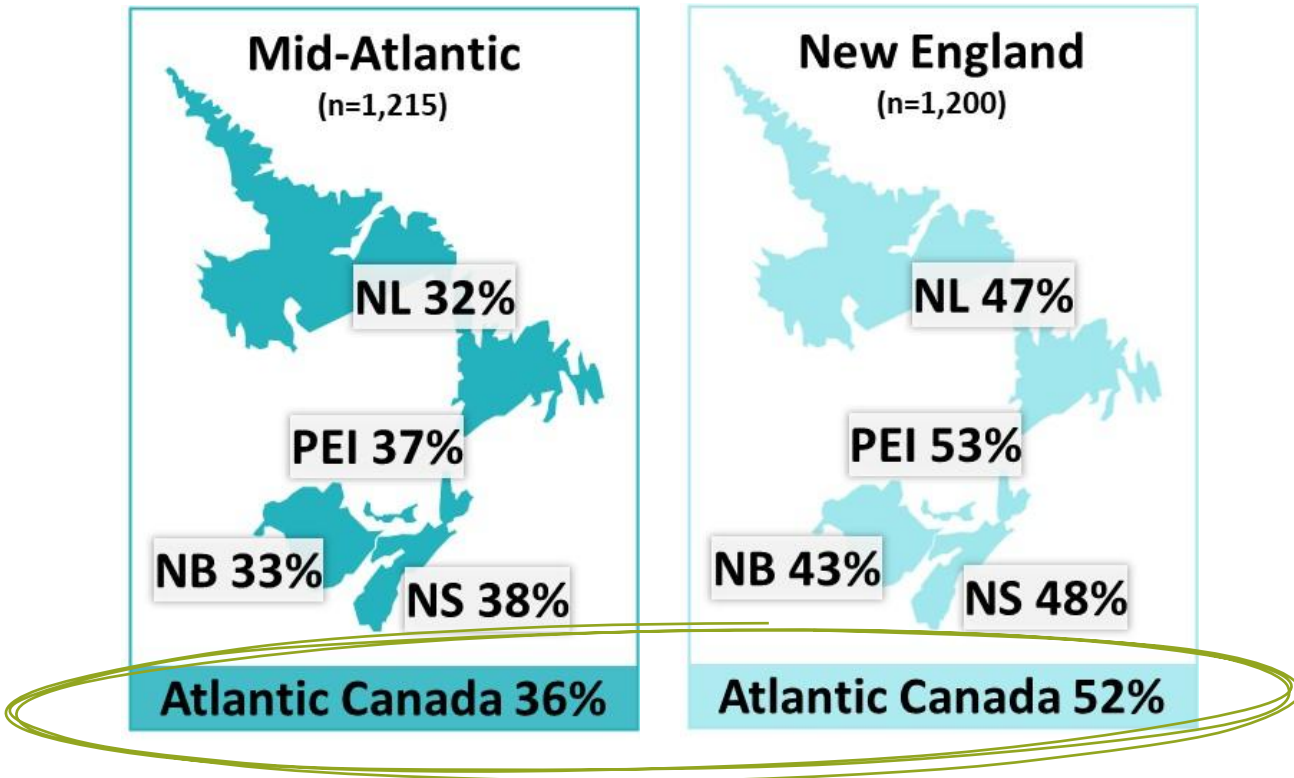
Ad Recall & Evaluation



Ad Recall & Evaluation

Exposure to Atlantic Canada tourism advertising is strong, particularly in the New England region.

General Recall of Tourism-Related Ads by Destination





Ad Recall & Evaluation

The NB ads are considered appealing and motivating, positively influencing travel likelihood.

New Brunswick

The ads...



Are Appealing: 77%



Motivates Them to Travel: 75%



Likely to take a pleasure trip to NB after seeing ads



Agreement with Statements: The ads ...

- 77% • Make NB feel like a friendly/welcoming destination
- 72% • Include things of interest to me
- 70% • Make the destination look like a unique vacation experience
- 70% • Make me want to find out more about NB





Ad Recall & Evaluation

The NL ads hold strong appeal, with the bulk of US travellers agreeing the ads encourage them to visit the province and showcase unique things they can see and do that they can't elsewhere.

Newfoundland & Labrador

The ads...

- Are Appealing: 79%
- Motivates Them to Travel: 76%

62%
Likely to take a pleasure trip to NL after seeing ads



Agreement with Statements: The ads ...

- 72% • Include things of interest to me
- 71% • Make me want to visit NL
- 71% • Make me want to find out more about NL
- 70% • Tell me you can do and see things in NL you that you can't elsewhere






Ad Recall & Evaluation

The NS ads are largely considered appealing and motivating, showcasing the proximity of the ocean and positively influence likelihood to travel to the province.

Nova Scotia
The ads...

Are Appealing: 74%

Motivates Them to Travel: 72%

64%
 Likely to take a pleasure trip to NS after seeing ads

Agreement with Statements: The ads...

- 71%** • Show that, in NS, you'll never be far from the ocean or its influence
- 67%** • Show that NS is Canada's essential seacoast destination
- 67%** • Make me want to find out more about NS
- 67%** • Include things of interest to me



Ad Recall & Evaluation

The PEI ads hold strong appeal, are considered motivating, and positively influence likelihood to visit.

Prince Edward Island

The ads...

- Are Appealing: 81%
- Motivates Them to Travel: 79%

Agreement with Statements: The ads...

- 74% • Include things of interest to me
- 73% • Make me want to find out more about PEI
- 73% • Tell me whenever you visit, you'll feel lighter
- 72% • Tell me to come find your island

66%

Likely to take a pleasure trip to PEI after seeing ads



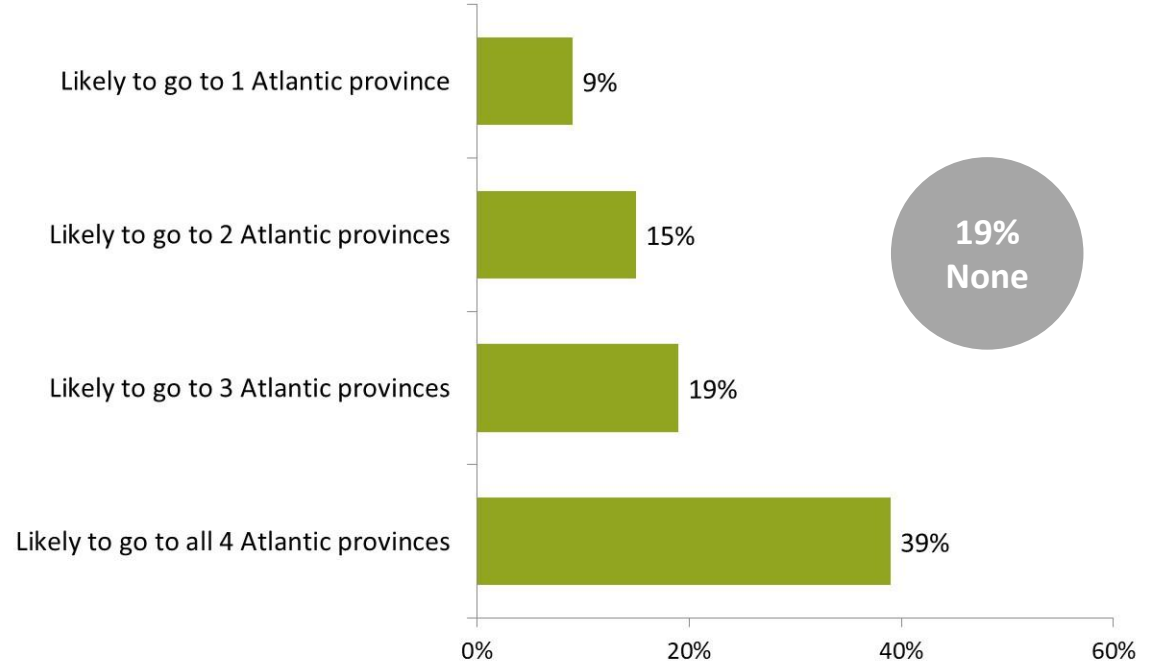
Travel Intentions (post-ads)

Collectively, the ads positively influence travel likelihood to the region, inspiring greater visitation to multiple provinces.

After seeing the ads for all four Atlantic Canada provinces ...



Likely to Visit Atlantic Canada % Definitely/Probably Would Consider Visiting Post Ads





Looking Forward

1. **US travellers have been travelling extensively post-pandemic**, with strong levels of international travel being reported, particularly among New England residents.
2. Results suggest **Americans' appetite for travel is likely to continue**, but this **may be tempered by other influencing factors**.
3. **Proximity between the New England region and Atlantic Canada appears to play a key role in destination choice**, as does **past experience in Atlantic Canada**.
4. **Atlantic Canada continues to face tough competition when looking at the US market**. **Differentiating Atlantic Canada from other destination choices is key**.
5. Current advertising campaigns are **well-received and positively influence interest** in visiting multiple provinces.
6. **Air travel continues to be key** in meeting US travellers' needs.



