



NARRATIVE
RESEARCH

2023 US Consumer Study

Presentation of Results:
New Brunswick

March 28, 2024

Prepared for:





Methodology



Mode: Online survey



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



Completes: 2,402 travellers
(*Mid-Atlantic: 1,200 & New England: 1,202*)



Data Collection Dates:
July 25 – August 1, 2023



Average Completion Time:
22 minutes



Key Objectives:

- To better understand the factors that currently impact the way that Americans travel.
- Gain insight on how these factors may continue to impact travel intentions, behaviours and destination choices over the short term.
- Assess visitor market potential from each of these two regions.

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.

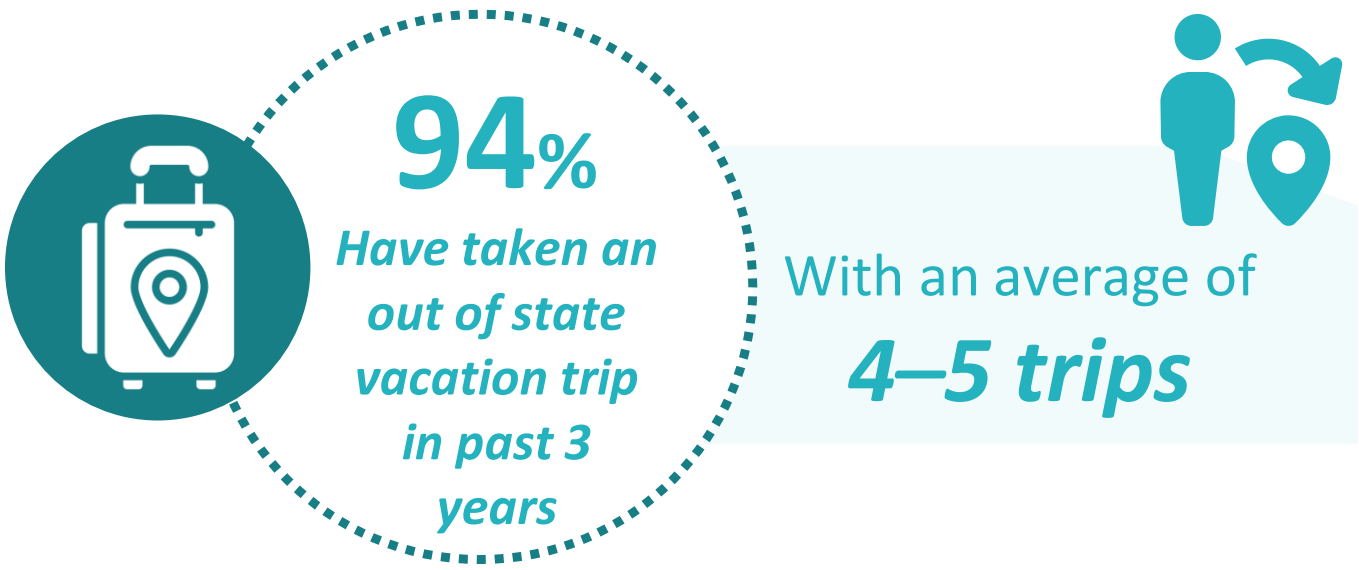
No quotas were put in place for age, gender or within region.





Travel Activities

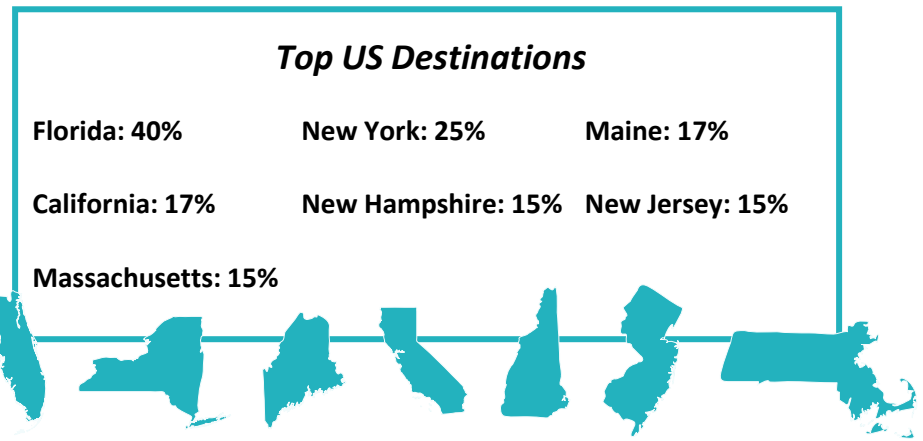
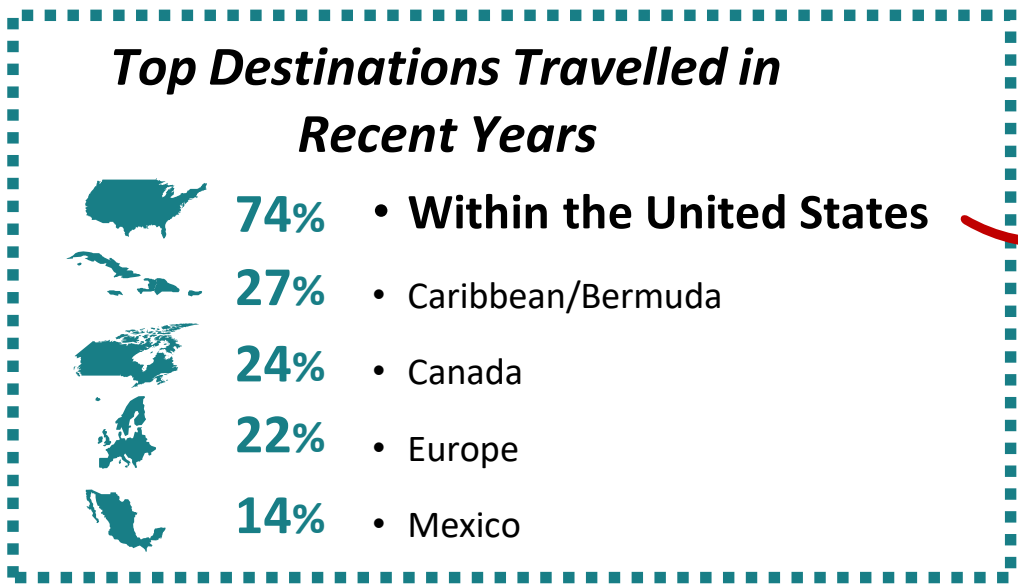
Nearly all US travellers surveyed have taken a recent out of state vacation. While the number of separate vacation trips recently taken varied across demographics, on average, travellers took four to five vacations over the last three years.





Travel Activities

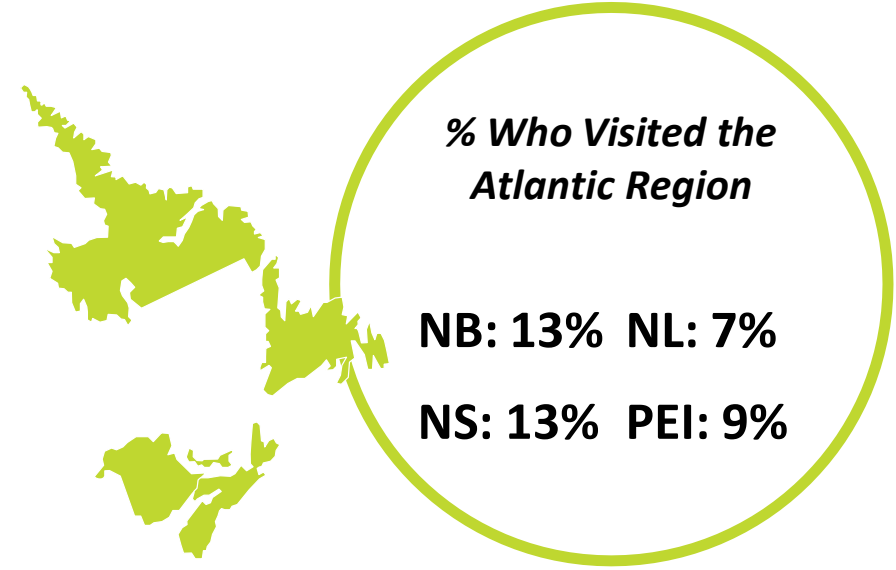
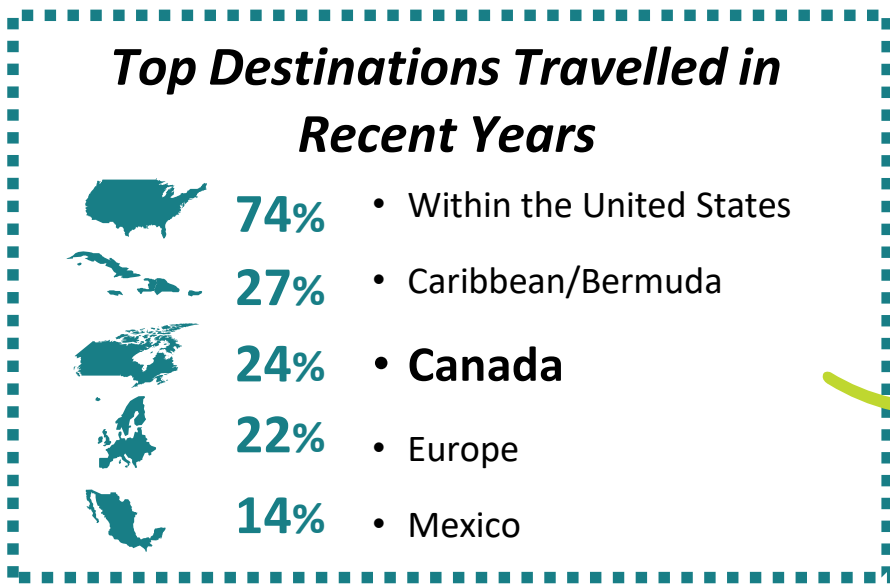
Domestic travel is most common among US travellers.





Travel Activities

One-quarter of US travellers have visited Canada in the past three years, with Ontario and Quebec being most visited Canadian destinations.

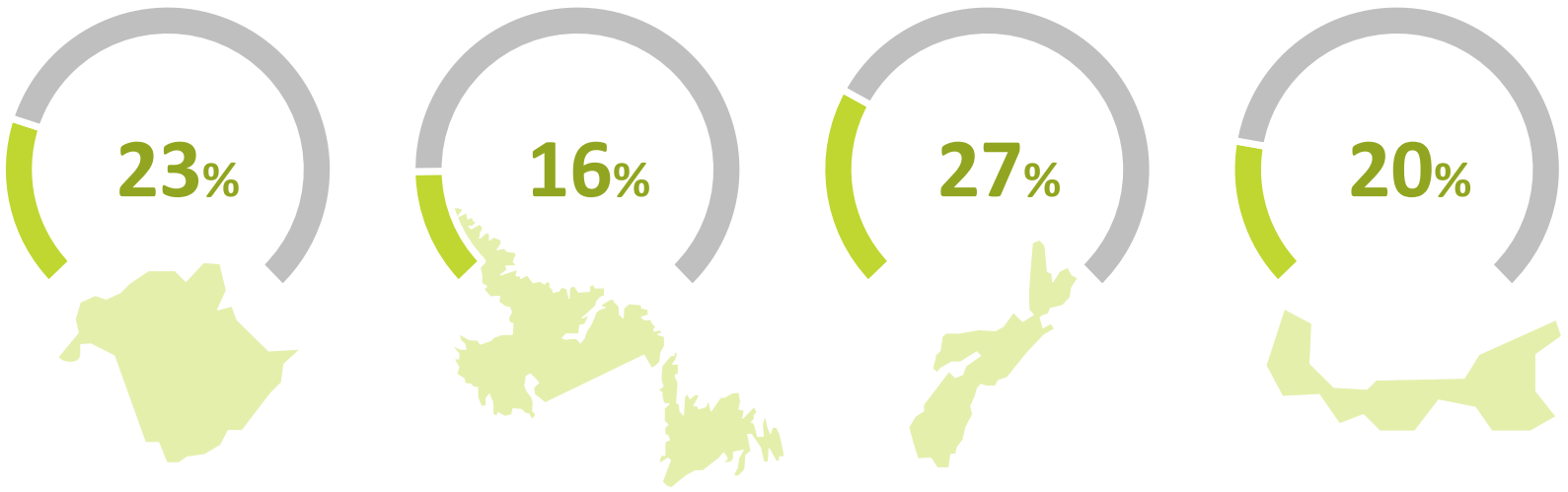




Travel Activities

While Ontario and Quebec are the most common provinces US travellers have visited in the past, a notable minority have visited Atlantic Canada – albeit typically more than three years ago.

Portion of US Travellers Who EVER Visited Atlantic Canada



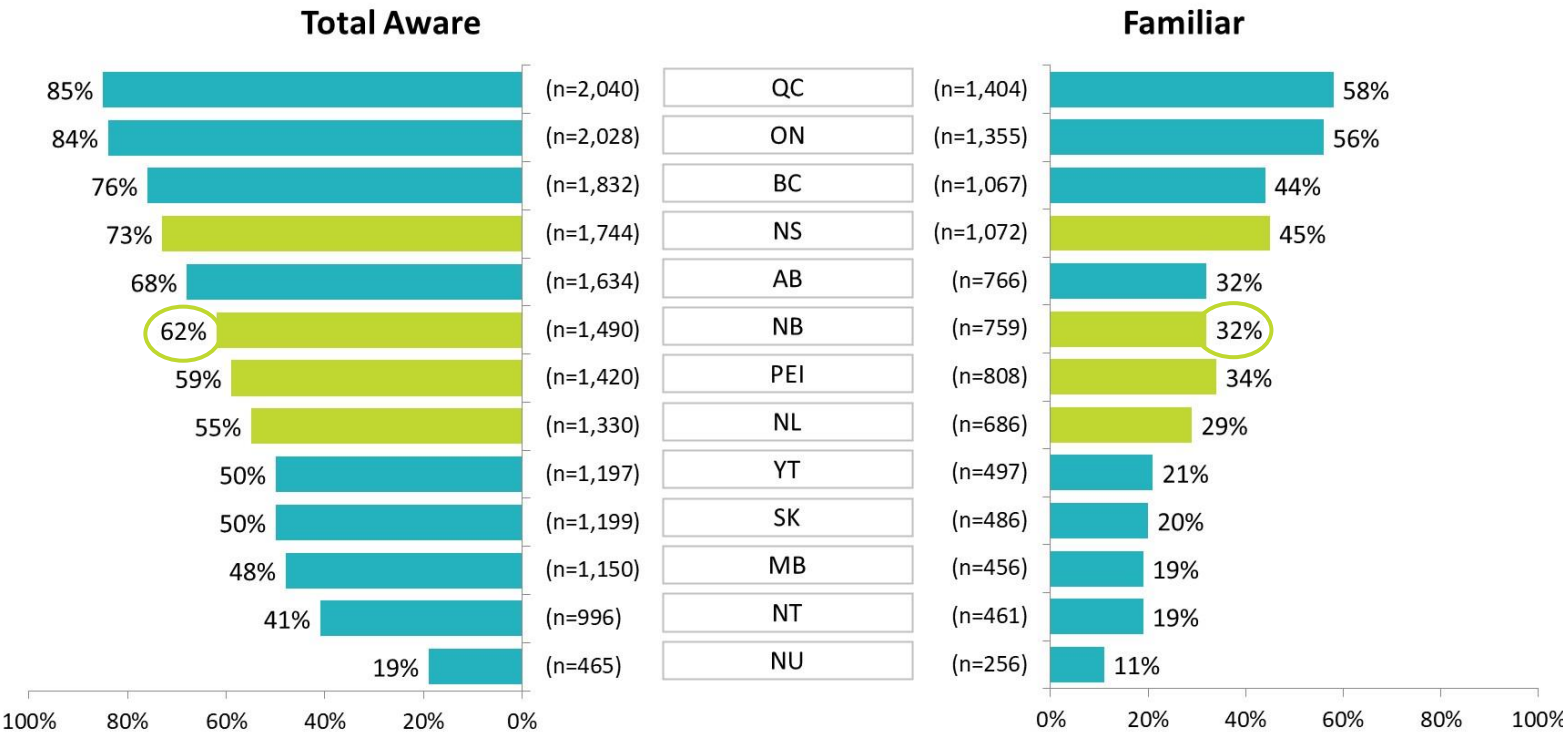
Among *non-visitors*
47%–63%
 have heard of each
 Atlantic Province



Awareness & Familiarity Overall

When looking at the US Travellers' market overall, awareness and familiarity is strongest for Ontario and Quebec. The bulk of US travellers are aware of each Atlantic Canadian province, with awareness and familiarity being highest for Nova Scotia.

Total Awareness and Familiarity of the US Travellers' Market





Expectations of New Brunswick

Nature, the ocean front, and sightseeing are key expectations of what to do and see in NB.

Key expectations of NB ...

NATURE
OCEAN FRONT
SIGHTSEEING

NB: "Beautiful scenery, great place for camping and hunting. Fishing as well. Very picturesque and the very definition of quaint. My wife and I love New Brunswick for their bed And breakfasts."

NB: "Drink craft beer and see a lighthouse."

NB: "Ocean activities, drive, fish, see farmland, visit villages and cities, shop, enjoy great food."

NB: "I would go there and explore, take nature walks to photograph the wildlife and have real maple syrup."

NB: "Visit the highest tide area to see the rock formations, visit other national parks for hiking, and picnics. Stay in Moncton, go on a food tour and eat lobster."

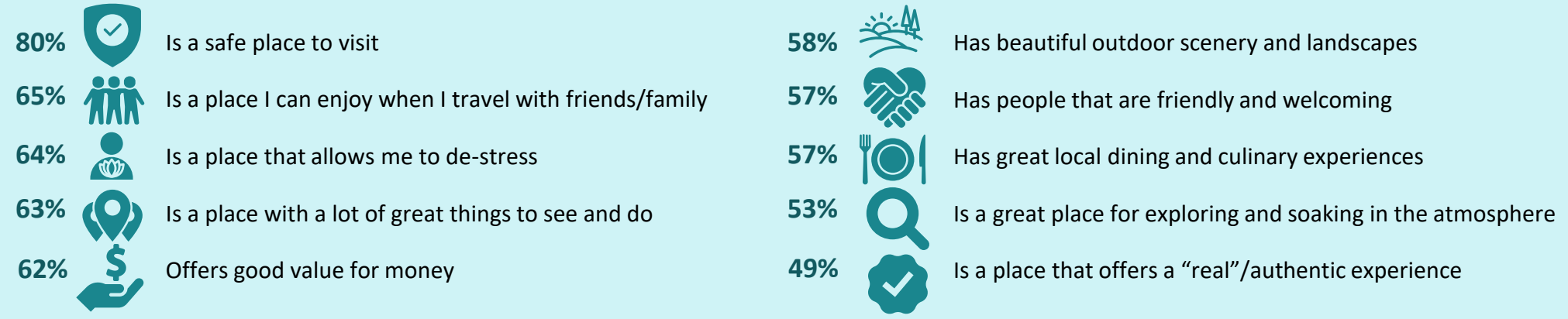
NB: "Spend a lot of time outdoors doing active things such as boating, hiking, fishing, and skiing."



Factors Impacting Destination Choice

While a wide-range of factors are important when choosing a vacation destination, safety is deemed most critical.

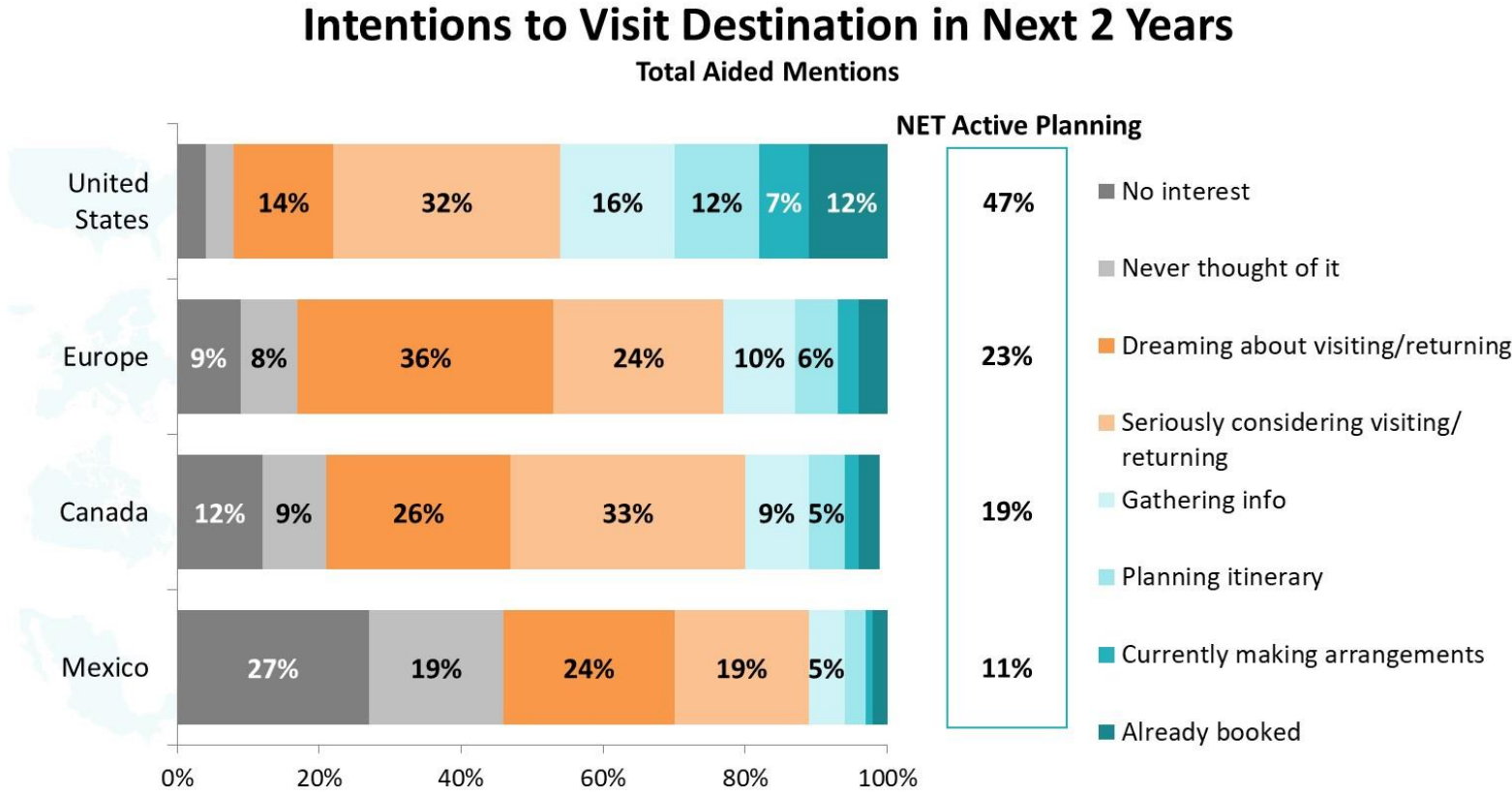
Top 10 Factors Critically Important When Choosing a Pleasure Trip Destination





Travel Intentions – Destination Comparison (pre-ads)

When examining intentions to visit across four major market areas, results highlight US travellers' preference for domestic travel.



Q.19a-d: Please indicate which statement best describes your intentions to visit [LOCATION] for a pleasure trip of 2 or more nights in the next 2 years? (n=2,402) Note: Mentions of 4% or less are represented by a bar.



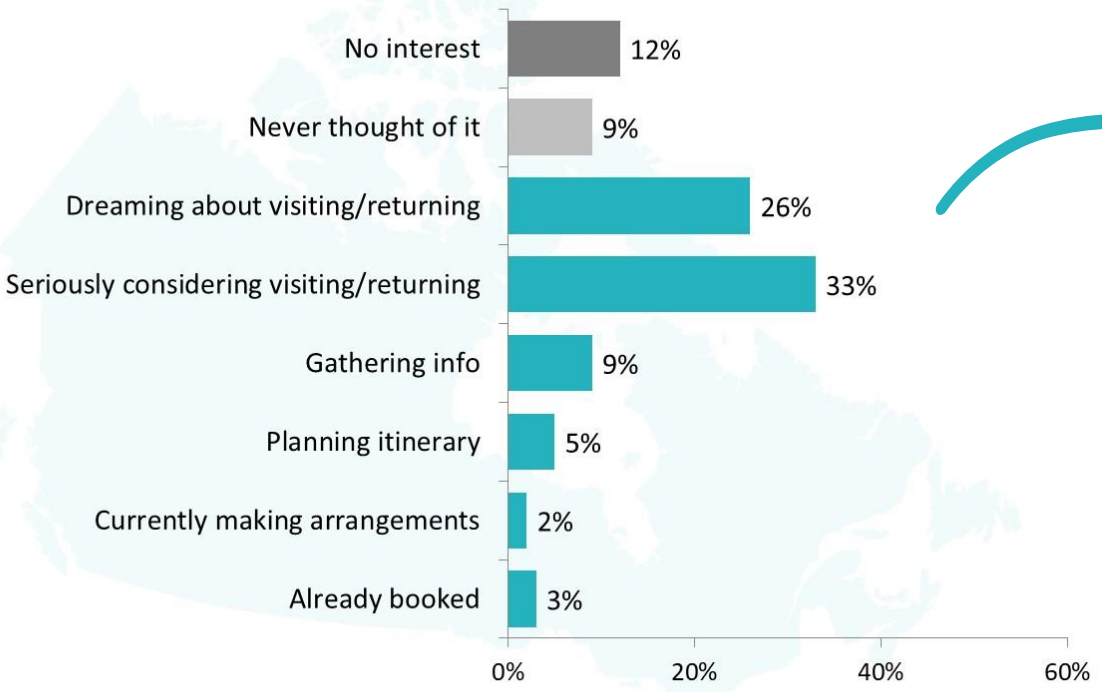


Travel Intentions (pre-ads)

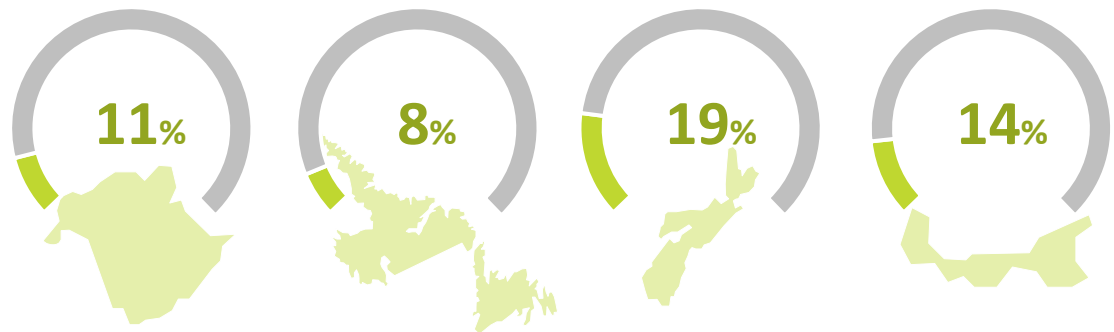
One-half of travellers have either already booked or plan to book a trip within the US in next two years. While travellers are likely to consider Canada as a destination, there is less active planning of such trips in the next two years.

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



Q.19b: Please indicate which statement best describes your intentions to visit Canada for a pleasure trip of 2 or more nights in the next 2 years? (n=2,402)

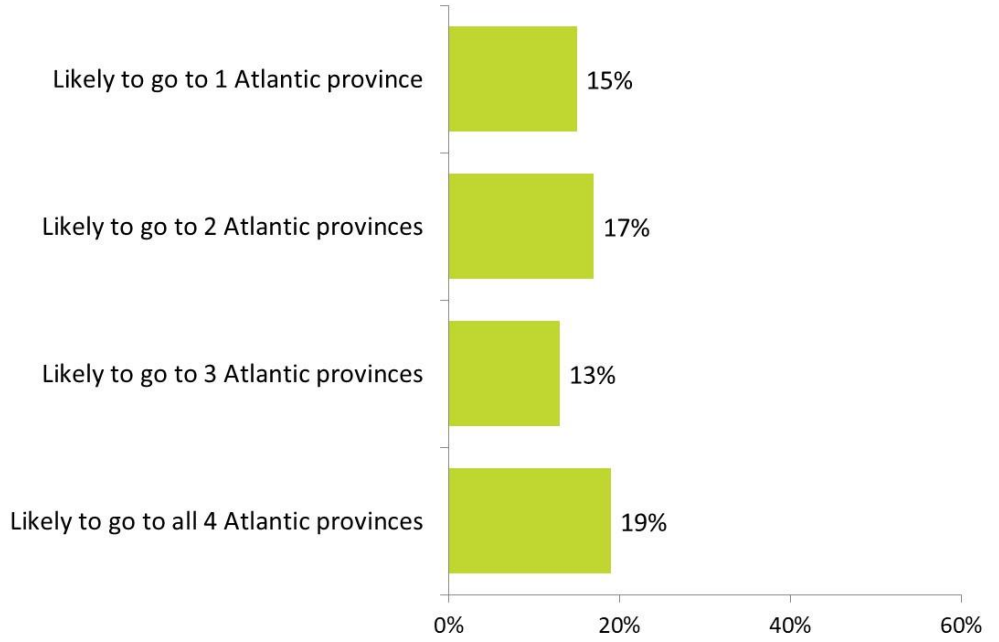


Travel Intentions (pre-ads)

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

63% of US travellers report some likelihood of considering travel to **at least one** Atlantic Canada province in the next two years.

Likely to Consider Atlantic Canada % Definitely/Probably Would Consider Visiting

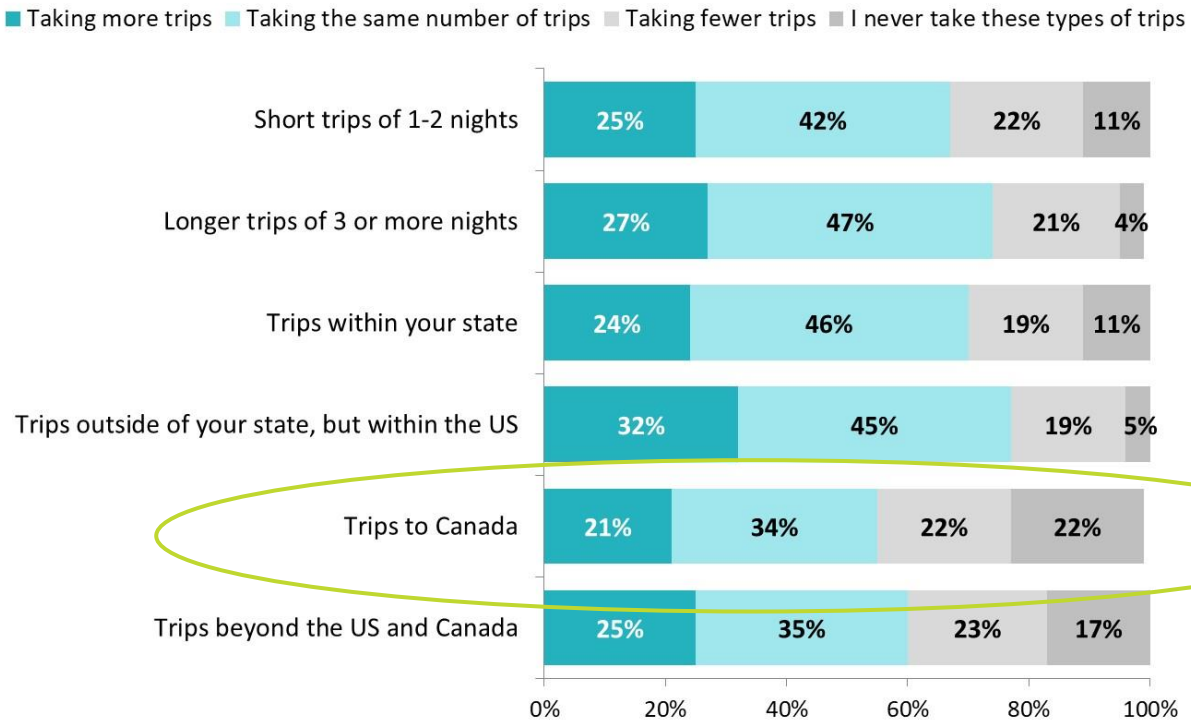




Future Travel Intentions (pre-ads)

While the bulk of US travellers anticipate the number of vacation trips they will take in the coming year to be the same or higher than the previous year, it appears Canadian travel will remain relatively stable.

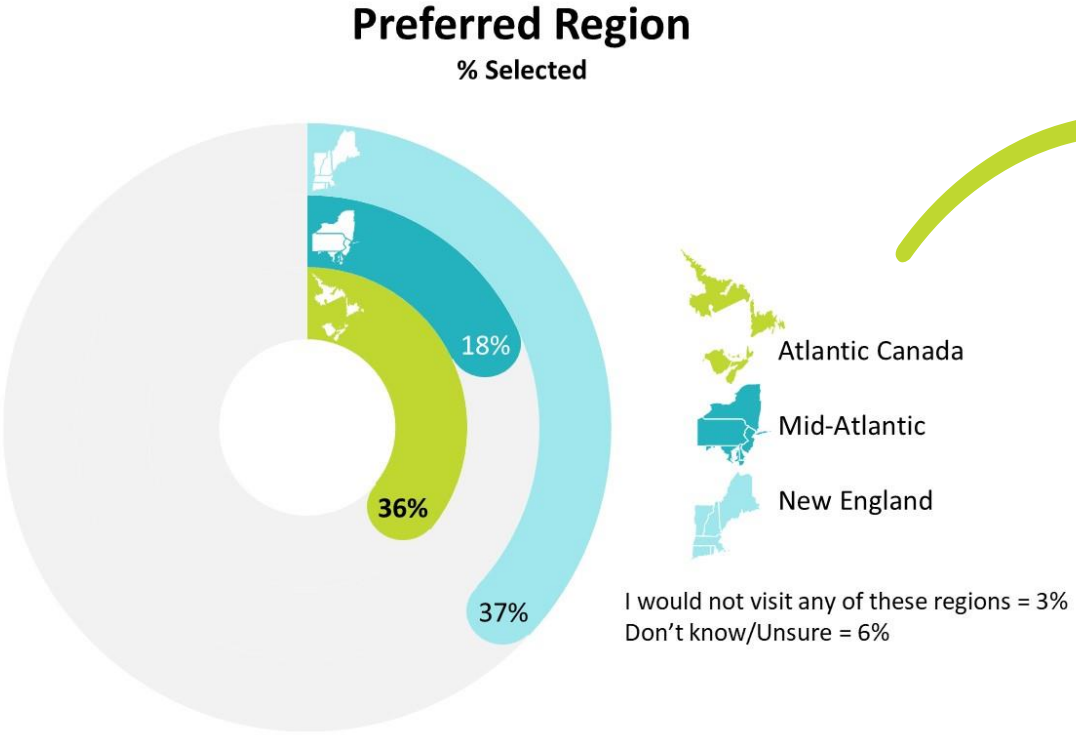
Future Travel Intentions





Preferred Destination

Overall, Atlantic Canada and New England are equally preferred regional destinations.



Why Atlantic Canada is preferred...

Heard good things/Want to visit/More interesting region

Never been/Want to go somewhere new/far from home/

Familiar with the other regions

Scenery/Nature/Wildlife

Like area/Enjoyed previous trips



Travel Planning

June to September are considered peak travel months for an Atlantic Canada vacation, with potential visitors expecting the planning cycle to last several months.

The Pleasure Trip Planning Cycle

**Preferred
Travel
Months**

*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=1,634	n=1,640	n=1,820	n=1,828
Peak seasons				
June	25%	25%	27%	27%
July	26%	30%	30%	30%
August	24%	26%	27%	27%
September	19%	17%	20%	19%
Average Number Months to Plan/Research and Book				
Plan/Research	4.5	4.9	4.8	4.6
Book	3.5	3.8	3.7	3.9

**Trip
Planning**

*Plan/Research:
4–5 months
Book:
3–4 months*





Travel Planning

Travel related websites and review sites are key sources for information when considering an Atlantic Canada vacation.












Top 5 Information Sources for Atlantic Canada





Travel Planning

Air travel is the most common anticipated mode of transportation to Atlantic Canada for vacation.

Modes of Travel								
Among Those Likely to Consider Travel to Atlantic Provinces								
		NB		NL		NS		PEI
Sample size	Mid-Atlantic (n=793)	New England (n=841)	Mid-Atlantic (n=796)	New England (n=844)	Mid-Atlantic (n=881)	New England (n=939)	Mid-Atlantic (n=885)	New England (n=943)
Air 	69%	53%	64%	55%	66%	51%	63%	51%
Car 	24%	38%	22%	31%	23%	36%	21%	33%
Cruise ship 	12%	12%	16%	14%	16%	16%	16%	14%
Ferry 	5%	8%	6%	11%	8%	17%	8%	18%
Recreational vehicle (RV) 	4%	4%	4%	3%	4%	4%	4%	3%
Motor coach 	3%	2%	4%	2%	3%	2%	3%	2%
Motorcycle 	2%	1%	3%	2%	3%	2%	3%	1%
Other	1%	1%	1%	1%	1%	1%	1%	1%
Don't know at this time	10%	12%	11%	12%	10%	10%	10%	12%






Travel Planning

Regardless of which Atlantic province they intend to visit, the majority of potential US visitors would use a travel agent or tour operator to assist with their planning.

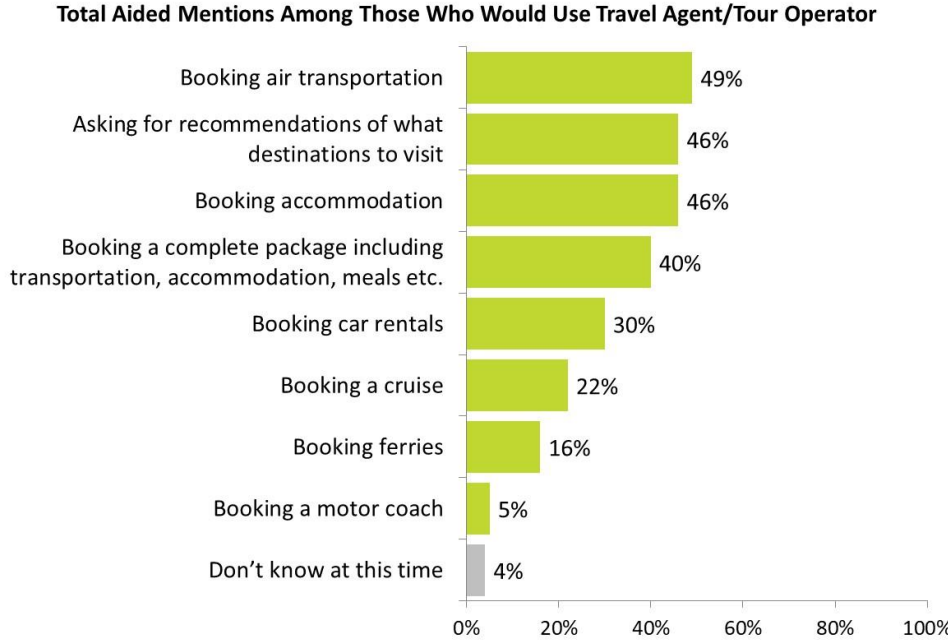
Of those likely to consider visiting Atlantic Canada in the next 2 years,



55%–59%
would use a **travel agent/tour operator**



Travel Agent/Tour Operator Services Likely to Use





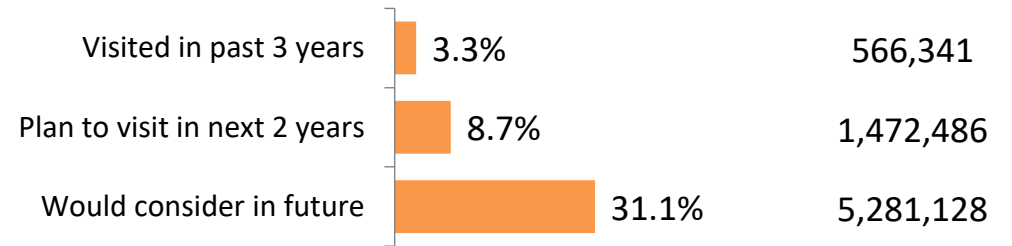
Market Potential

Findings show there is notable market potential for NB visitation across both markets.

Mid-Atlantic

Potential Visitors*

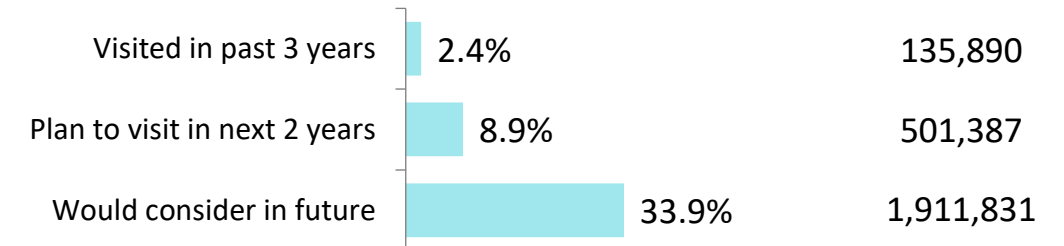
New Brunswick



New England

Potential Visitors*

New Brunswick



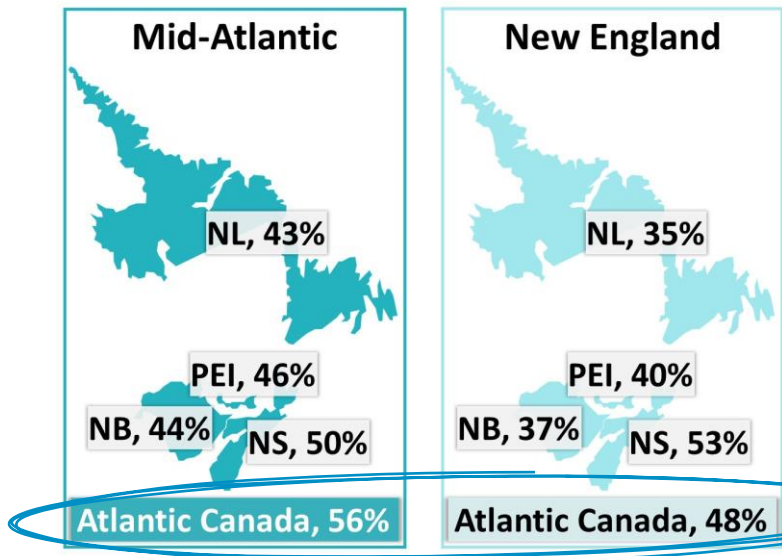
*Based on US census figures and survey qualification data



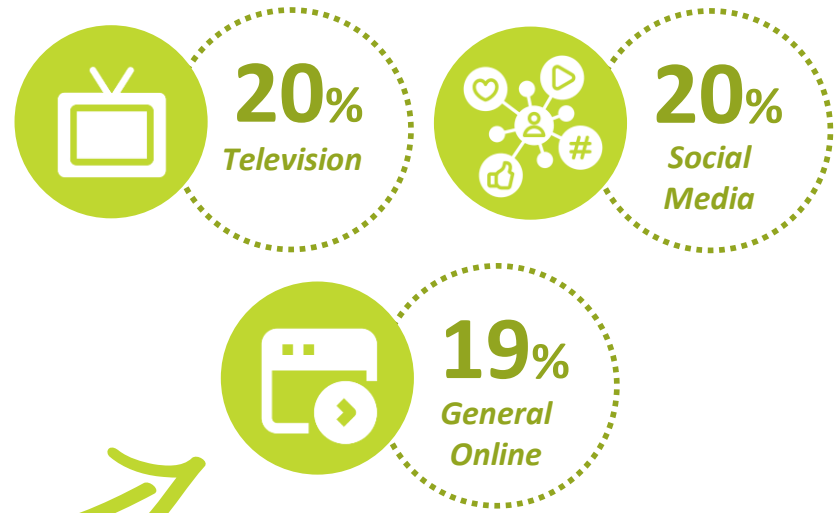
Ad Recall & Evaluation

Exposure to Atlantic Canada tourism advertising is strong, with US travellers being exposed through a variety of advertising mediums.

General Recall of Tourism Related Ads By Destination



Top Recalled Mediums for General Atlantic Canada Ads





Ad Evaluation

The NB ads are generally considered appealing and motivating.



New Brunswick Ads ...



Are appealing: **69%**



Motivate them to travel to NB: **60%**



Ad Evaluation

The NB ads generally leave the impression NB is a friendly and welcoming destination.

**Agreement
with
Statements**

The ads ...

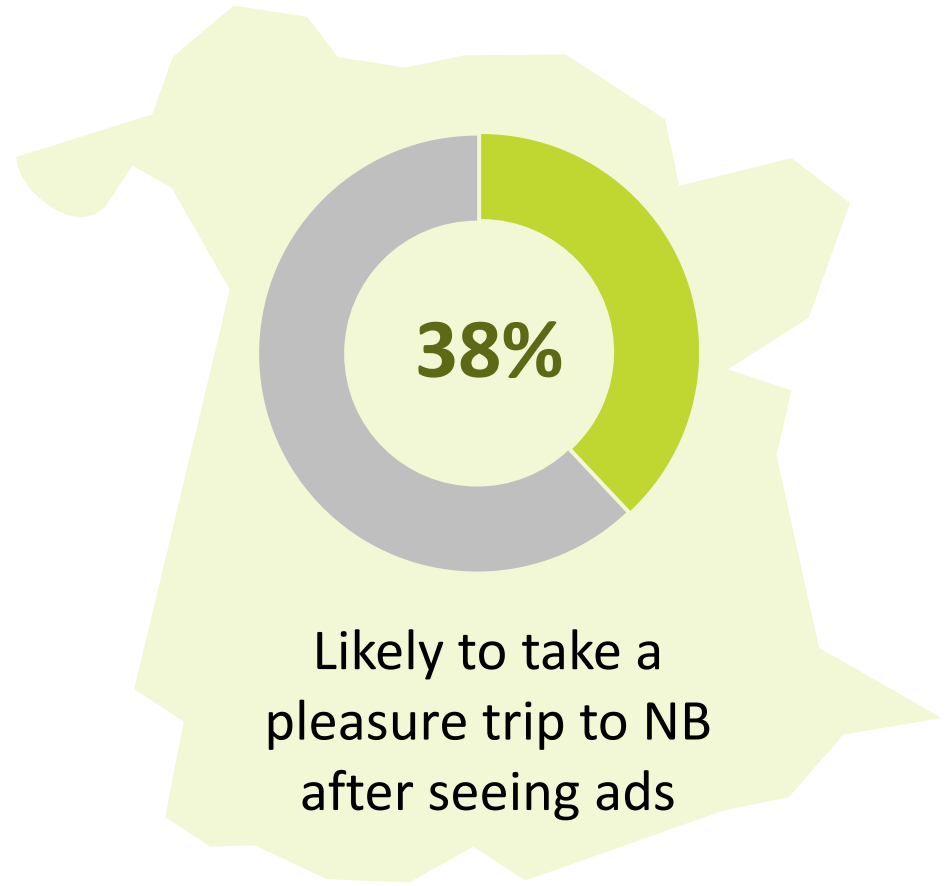
- 75%** Make NB feel like a friendly/welcoming destination
- 63%** Include things of interest to me
- 60%** Make me want to find out more about NB
- 59%** Make the destination look like a unique vacation experience





Travel Intentions (post-ads)

The advertising positively influences travel intentions to NB.



Vs. 11%
likelihood of visitation pre-ads



Travel Intentions (post-ads)

Overall, ad exposure positively impacts likelihood to visit Atlantic Canada.



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



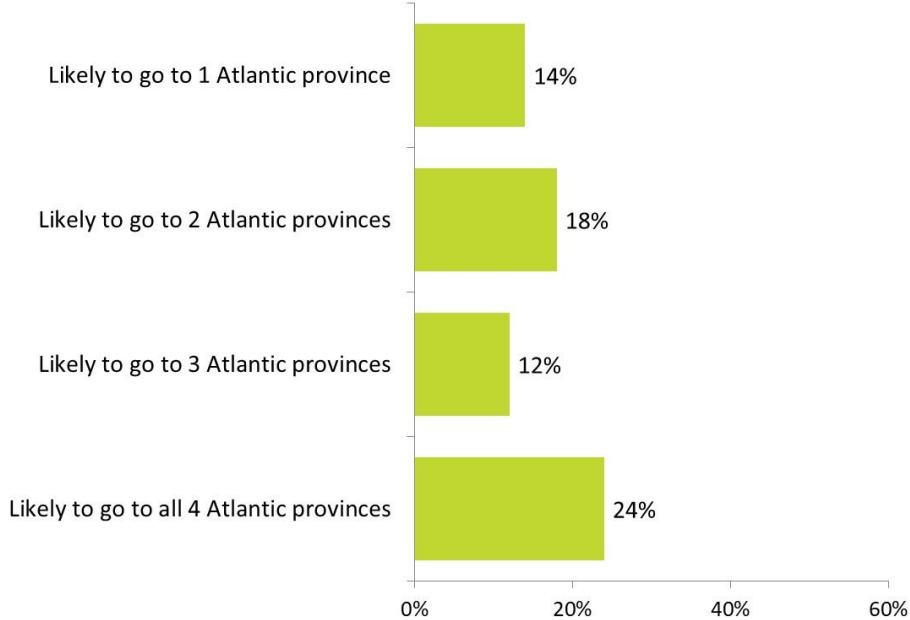
68%



of US travellers report some likelihood to travel to **at least one** Atlantic Canada province in the next two years (vs. 63% who expressed some likelihood to consider travelling to at least one Atlantic Canada province, pre-ad).

Likely to Visit Atlantic Canada

% Definitely/Probably Would Consider Visiting Post Ads





Looking Forward

- US travellers are generally open to a wide variety of destination choices, and Atlantic Canada holds appeal to many.
- Proximity plays a key role in destination choice.
- Past experience in Atlantic Canada clearly impacts travel intentions.
- Atlantic Canada faces tough competition when looking at the US market.
- Future campaign efforts should focus on media buys in the early Winter and Spring months.
- Differentiation, while considering affordability, will play a key role in encouraging US travellers to select an Atlantic Canada pleasure trip over other destination choices.
- An air travel access solution is needed to meet the US travellers' needs.



every insight tells a story.

