



**NARRATIVE**  
RESEARCH

## 2023 US Consumer Study

Presentation of Results:

*Nova Scotia*

March 22, 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

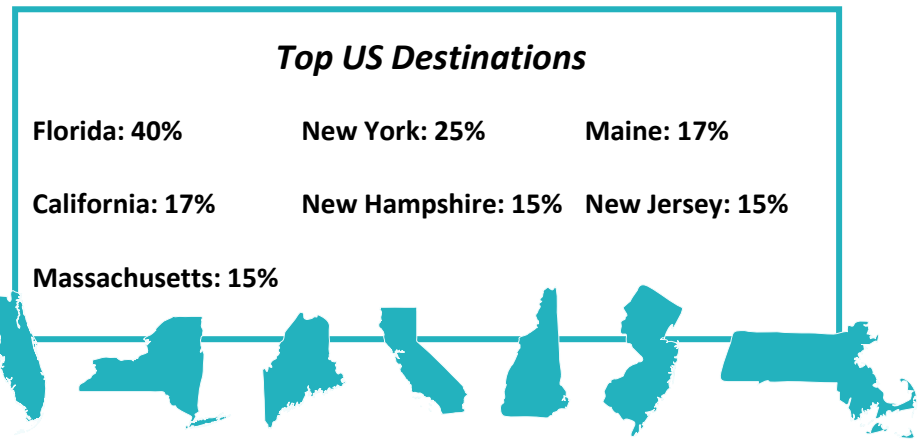
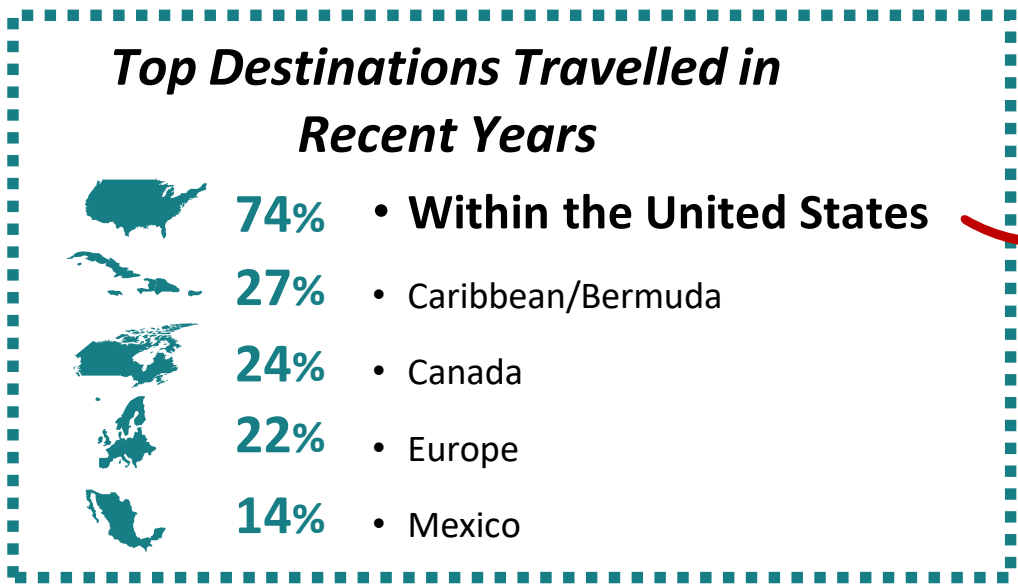
Nearly all US travellers surveyed have taken a recent out of state vacation. While the number of separate vacation trips recently taken varied across demographics, on average, travellers took four to five vacations over the last three years.





# Travel Activities

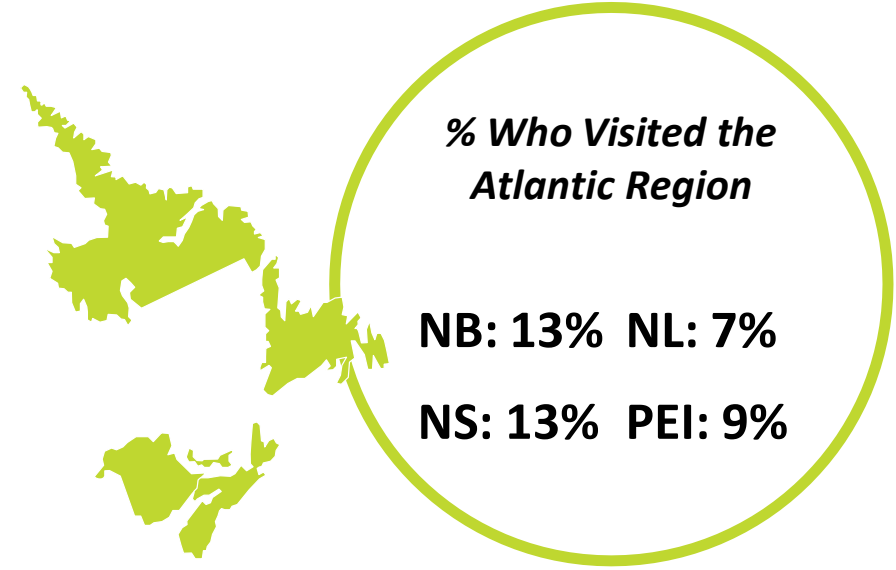
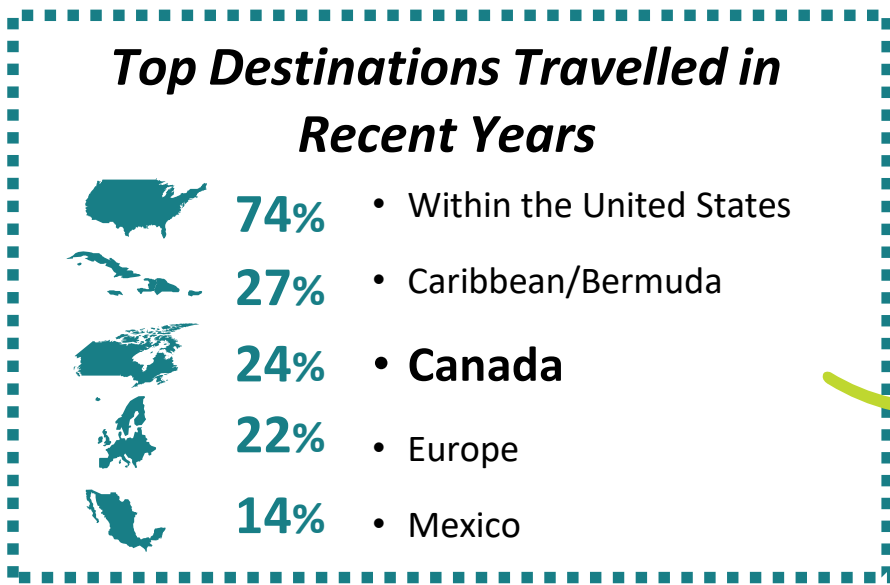
Domestic travel is most common among US travellers.





# Travel Activities

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

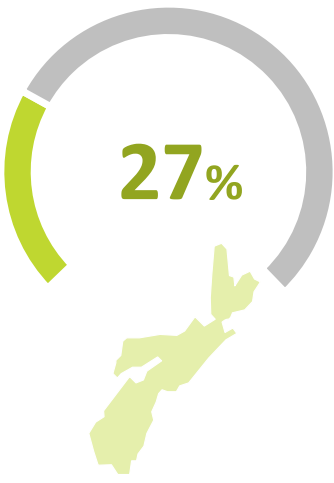
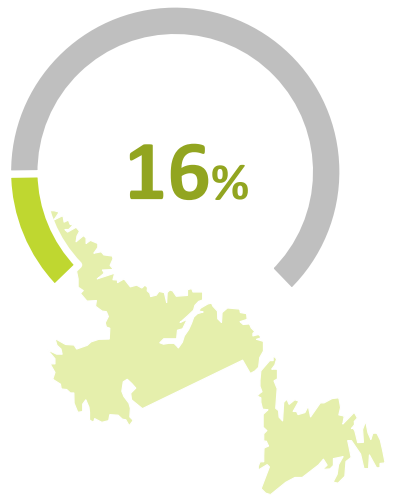
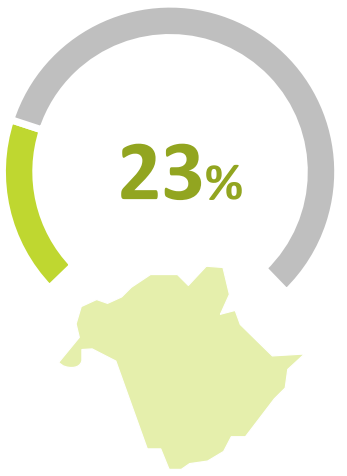




# Travel Activities

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



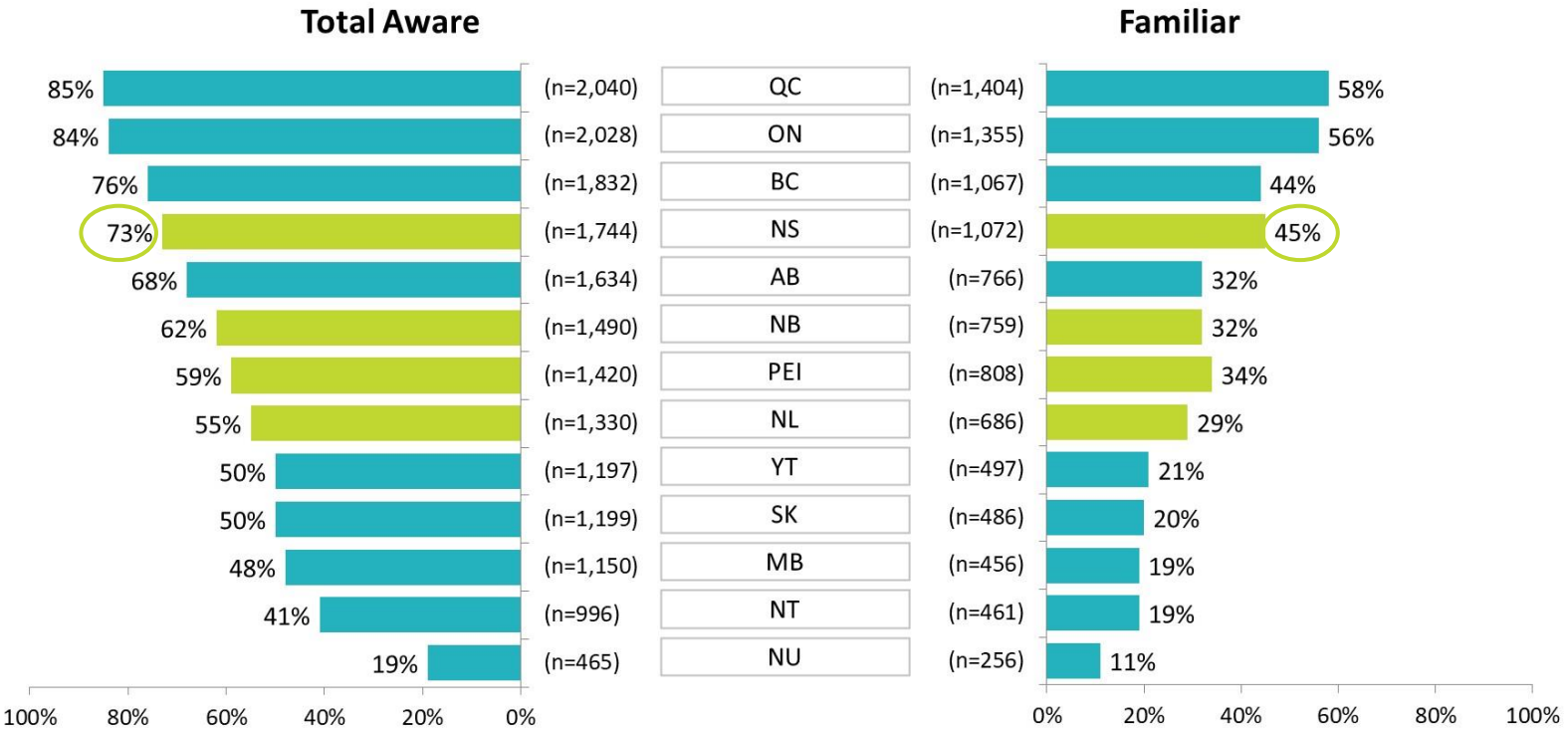
Among *non-visitors*  
**47%–63%**  
 have heard of each  
 Atlantic Province



# 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 Nova Scotia

*The ocean front, sightseeing, and nature are key expectations of what to do and see in NS.*

Key expectations of NS ...

NATURE  
OCEAN FRONT  
SIGHTSEEING

*NS: "I'd go in the summer for lots of outdoor experiences and beautiful scenery. I'd do hiking, boating, going to small restaurants for unusual cuisine. I'd go into antique shops and visit yard and estate sales looking for antiques."*

*NS: "Lobsters and seafood, enjoy the shoreline and lighthouse, Halifax waterfront, whale watching and much more."*

*NS: "Whale watching, the Titanic museum, hiking, beaches, Cape Breton Highlands National Park, and lobster."*

*NS: "I would go to Cape Breton and drive or cycle the Cabot Trail and hike a few of the trails."*

*NS: "Mining towns, scenic drives, historic villages."*

*NS: "I would expect a lot of outdoor activities and adventures such as hiking biking, rafting, seeing historic sites, enjoying lots of great food and drinks, and meeting many new great interesting people."*

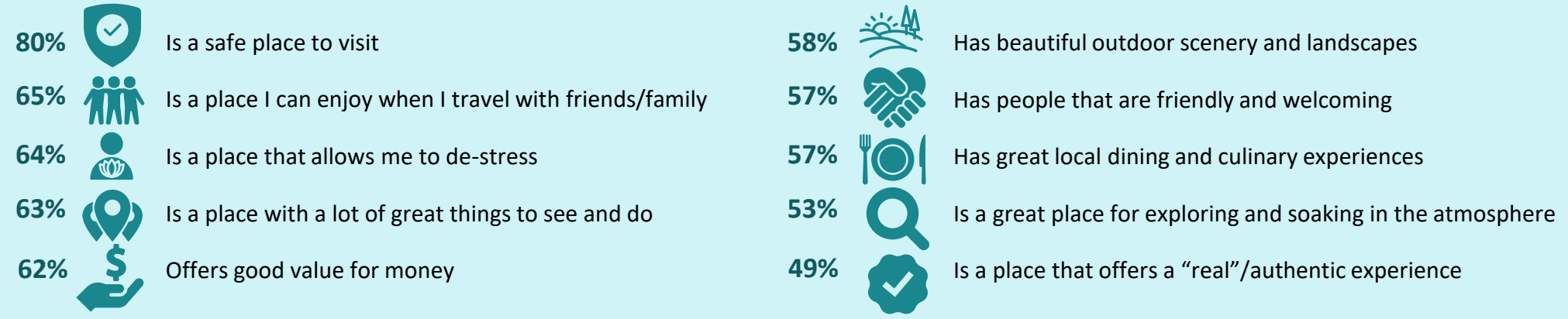




# Factors Impacting Destination Choice

*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***





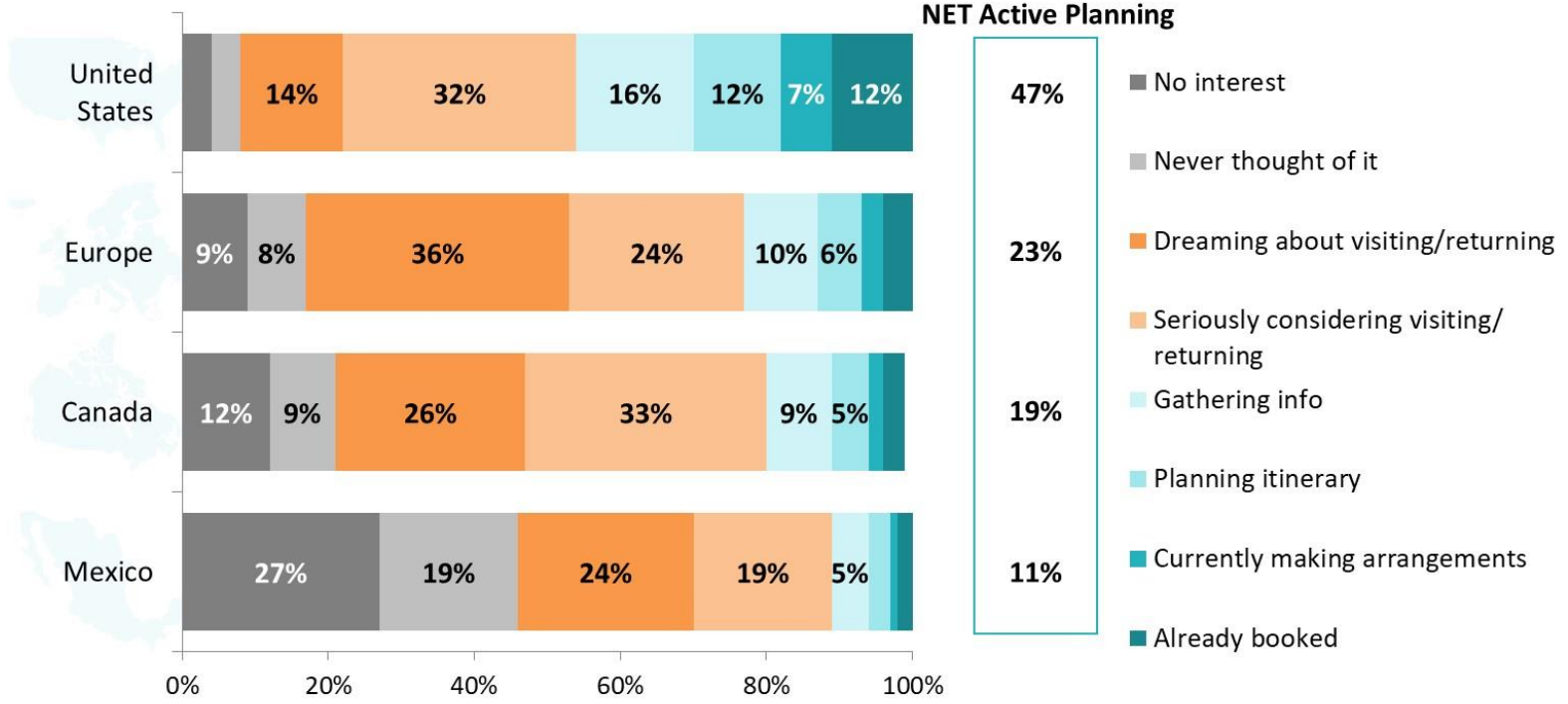
# Travel Intentions – Destination Comparison (pre-ads)

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

## Intentions to Visit Destination in Next 2 Years

Total Aided Mentions

NET Active Planning



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.



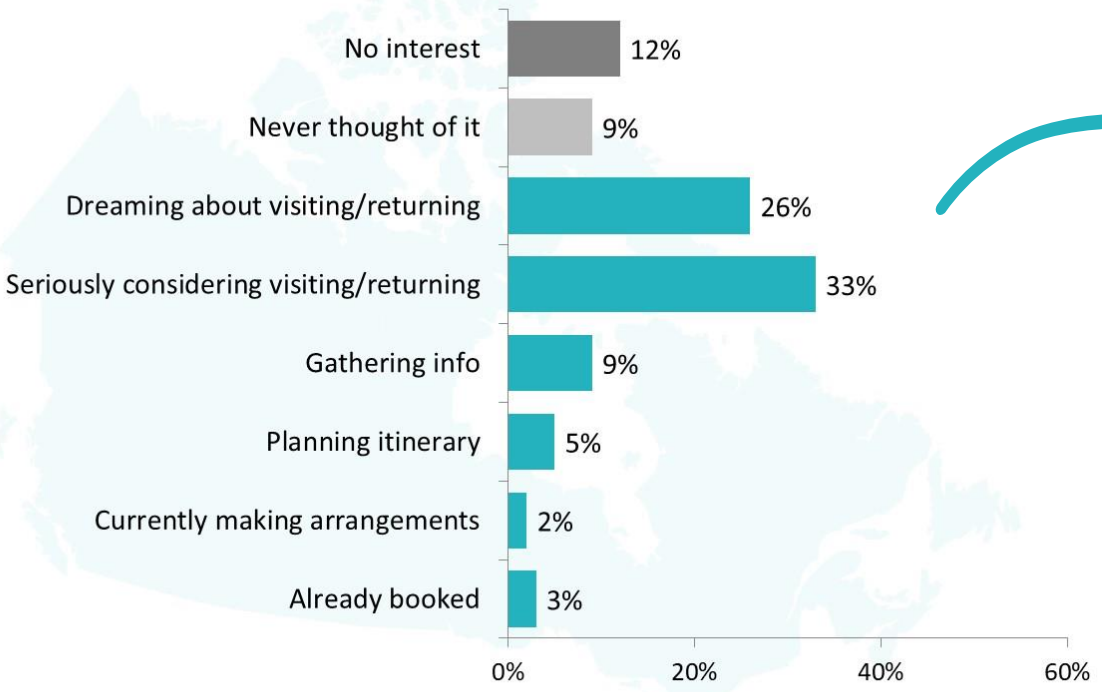


# Travel Intentions (pre-ads)

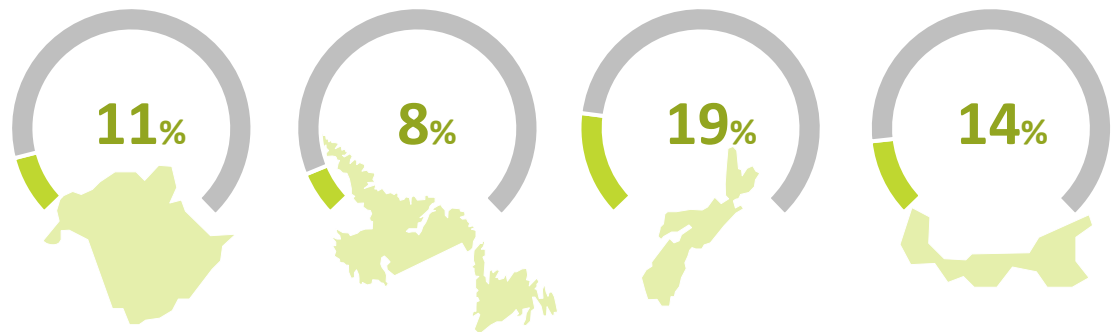
One-half of travellers have either already booked or plan to book a trip within the US in next two years. While travellers are likely to consider Canada as a destination, there is less active planning of such trips in the next two years.

## 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)

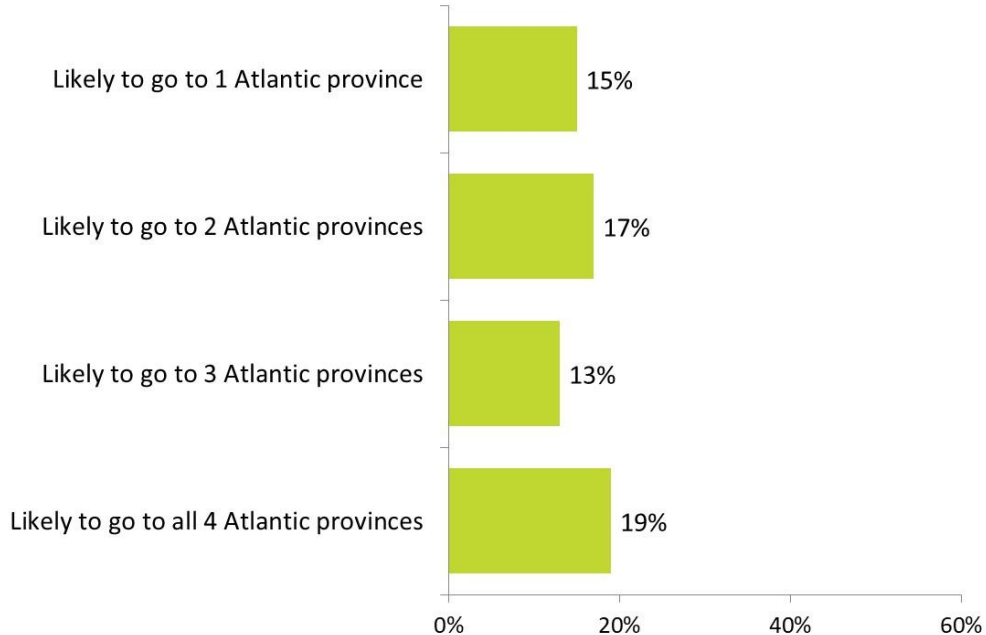


# Travel Intentions (pre-ads)

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

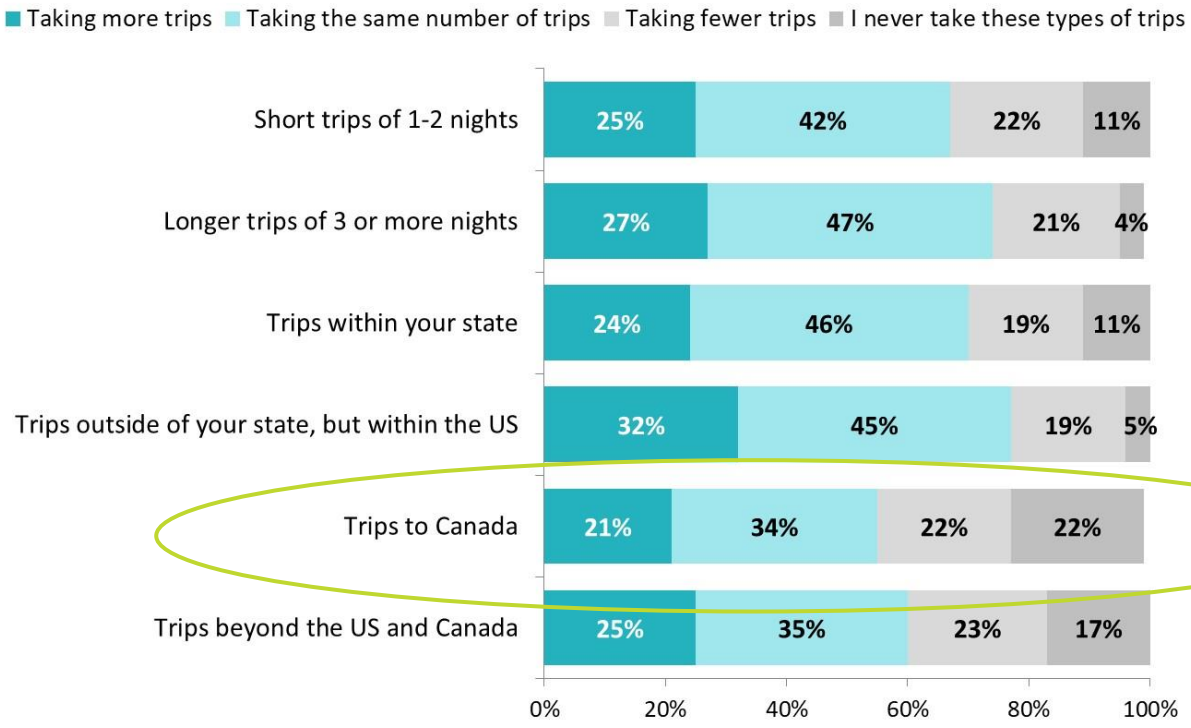




# Future Travel Intentions (pre-ads)

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.

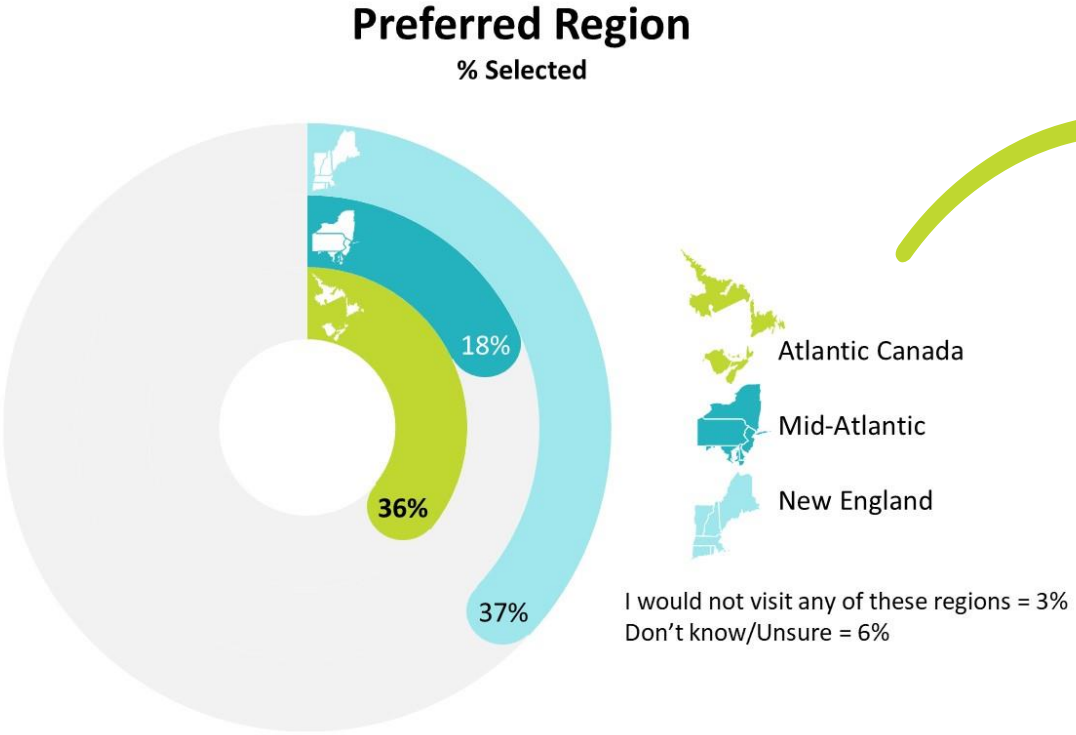
## Future Travel Intentions





# 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



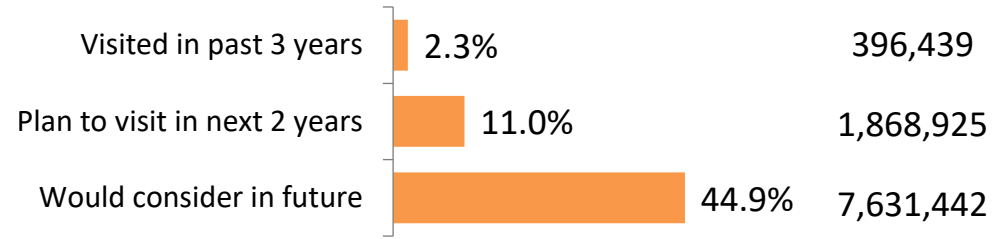
# Market Potential

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

## Mid-Atlantic

Potential Visitors\*

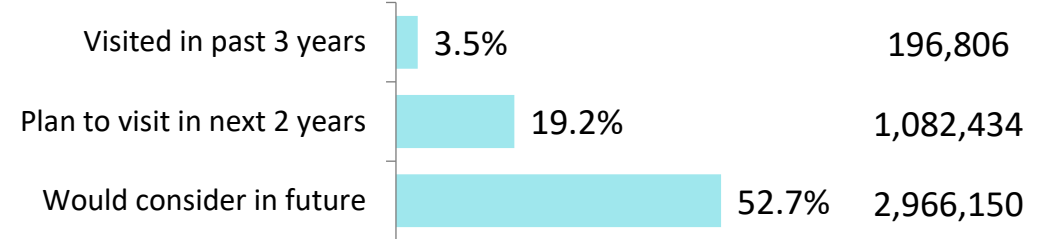
### Nova Scotia



## New England

Potential Visitors\*

### Nova Scotia



\*Based on US census figures and survey qualification data



# 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



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







# 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.

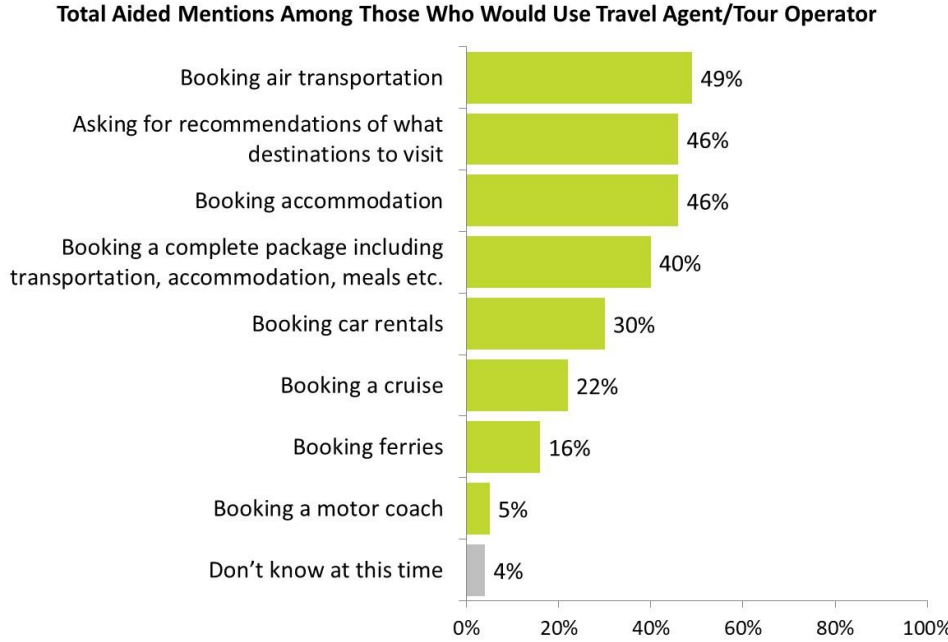
Of those likely to consider visiting Atlantic Canada in the next 2 years,



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



## Travel Agent/Tour Operator Services Likely to Use

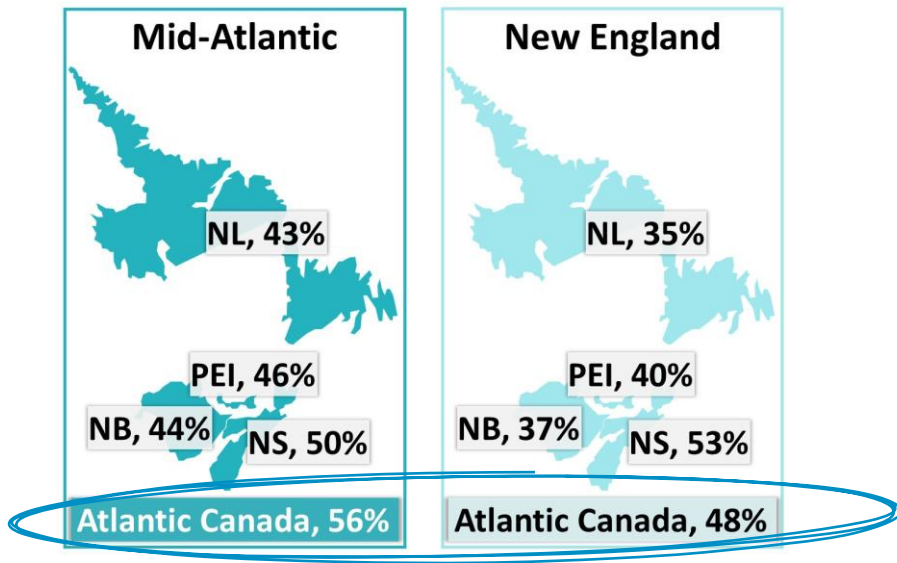




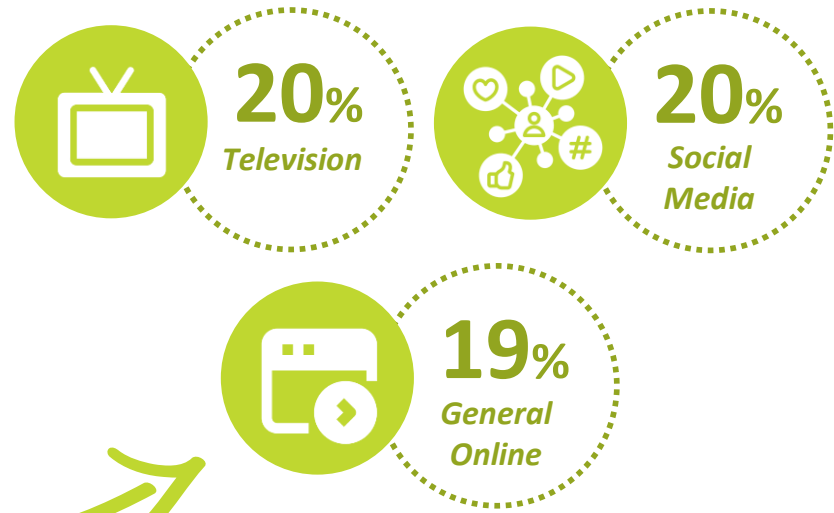
# Ad Recall & Evaluation

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



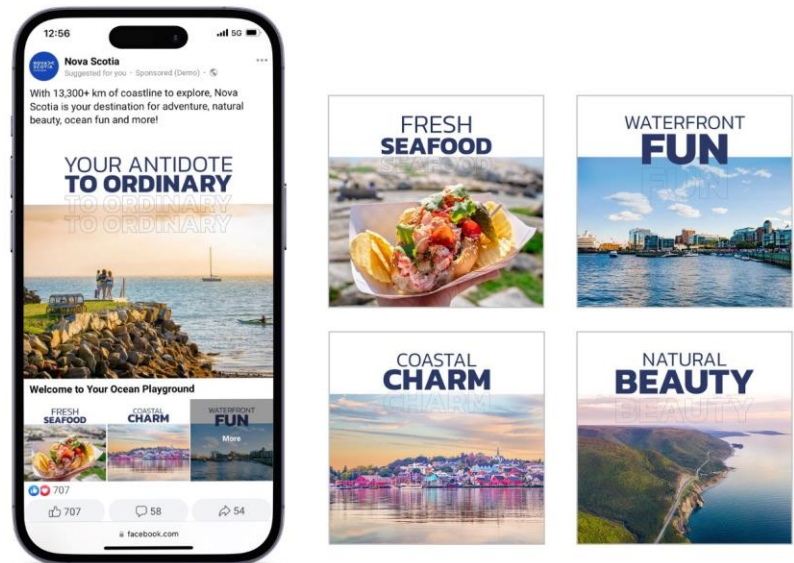
## Top Recalled Mediums for General Atlantic Canada Ads





# Ad Evaluation

*The NS ads are largely considered appealing and motivating.*



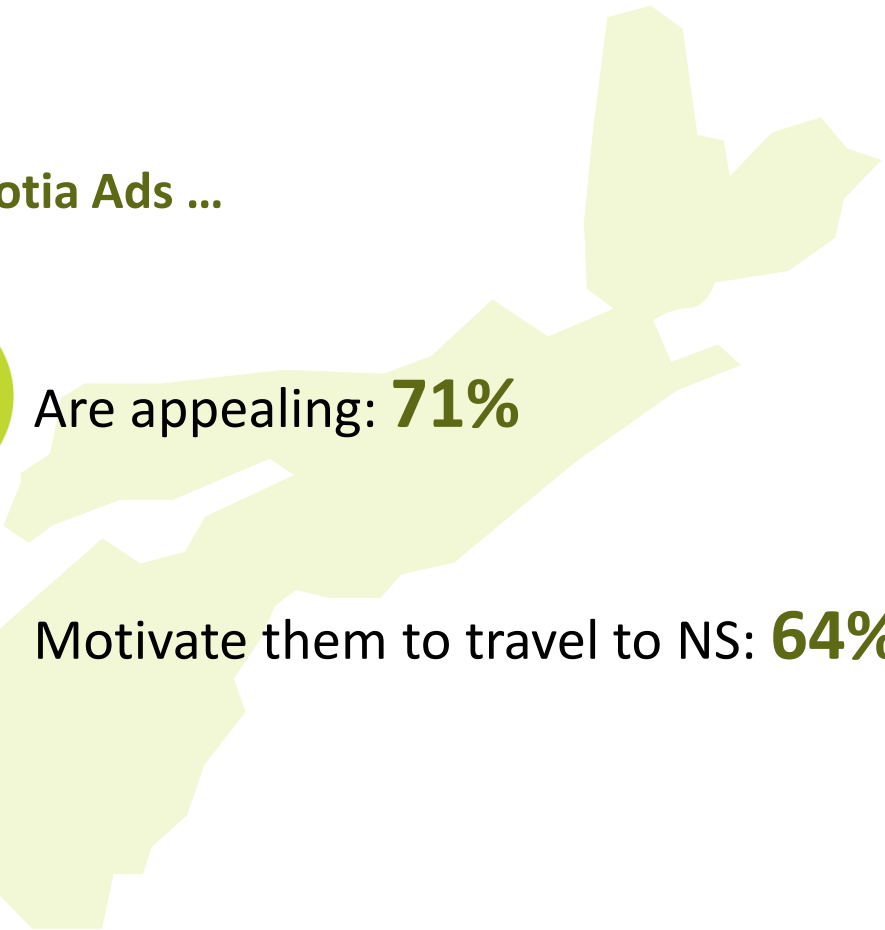
## Nova Scotia Ads ...



Are appealing: **71%**



Motivate them to travel to NS: **64%**





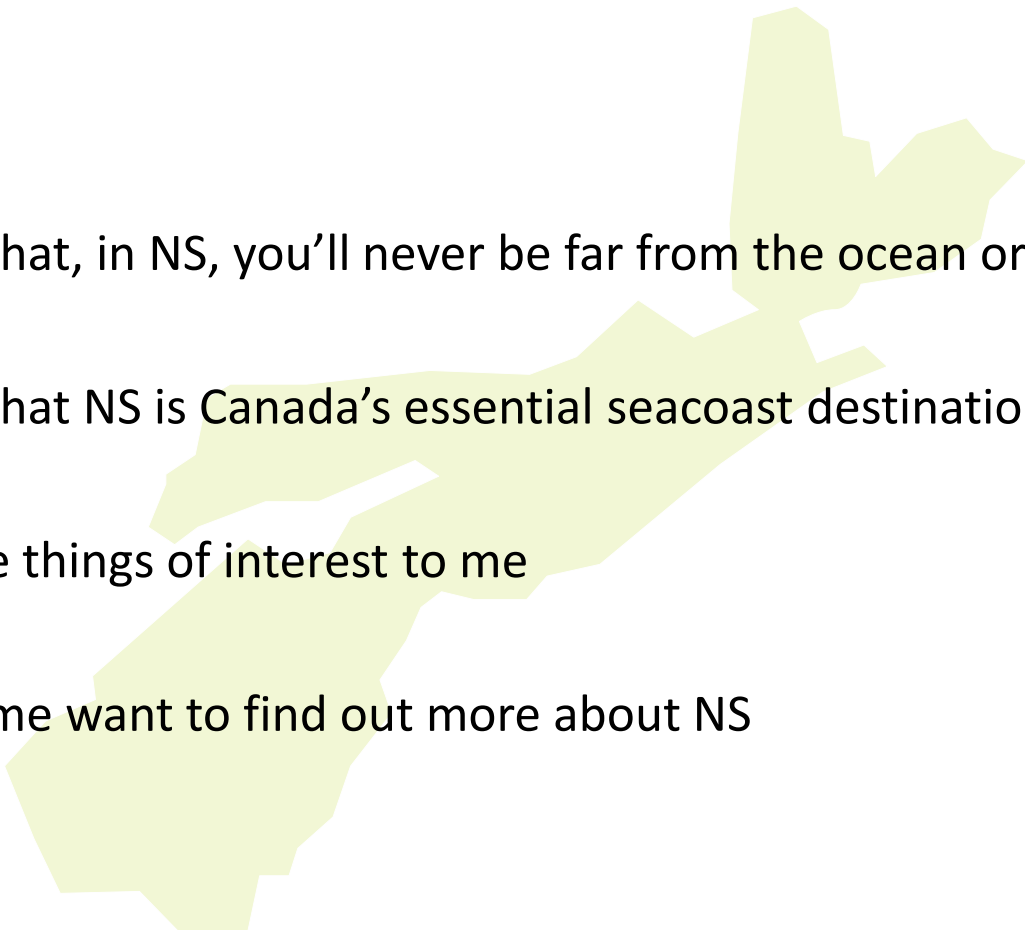
# Ad Evaluation

*The NS ads showcase the proximity of the ocean and Nova Scotia's place as Canada's essential seacoast destination.*



### The ads ...

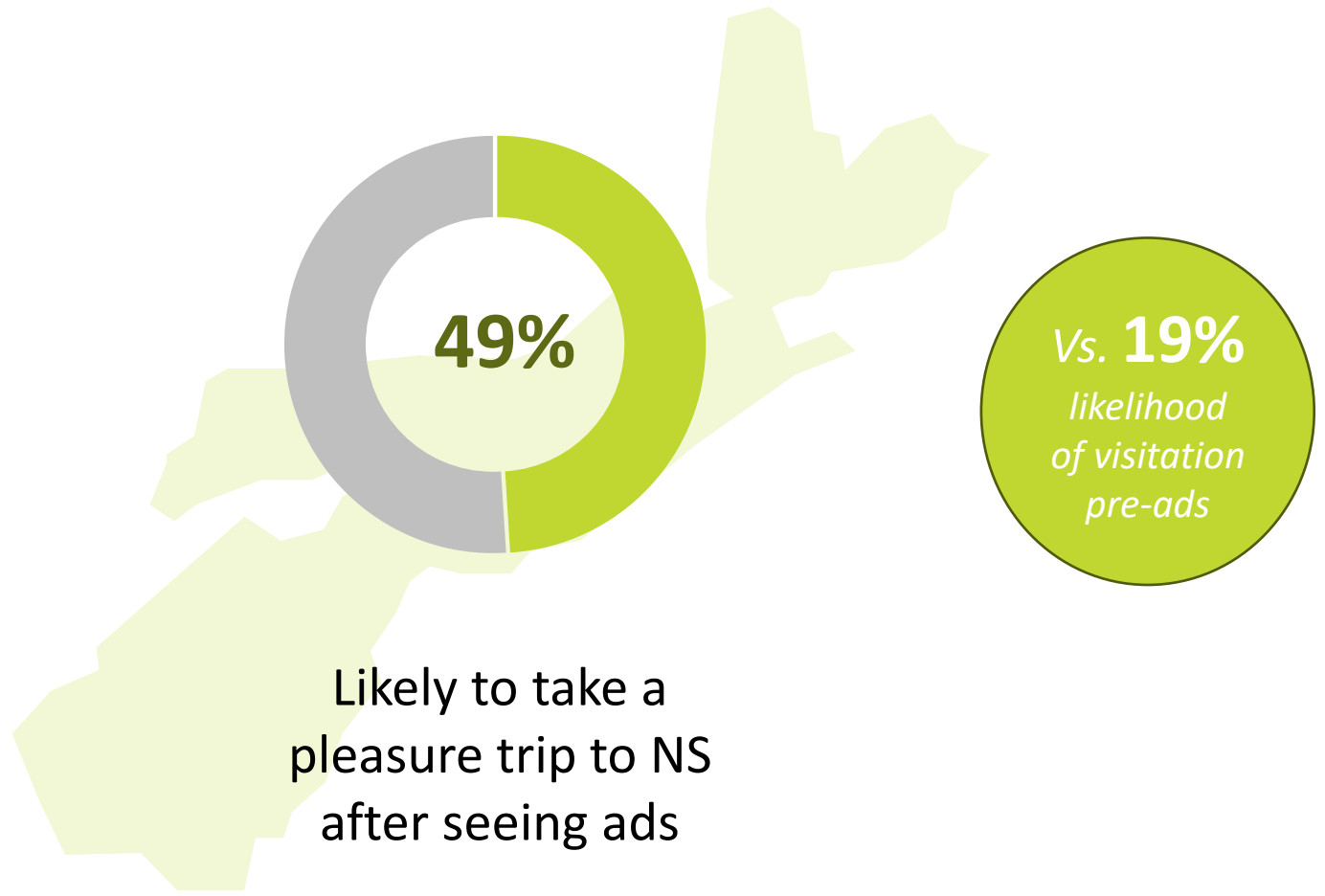
- 74%** Show that, in NS, you'll never be far from the ocean or its influence
- 68%** Show that NS is Canada's essential seacoast destination
- 64%** Include things of interest to me
- 63%** Make me want to find out more about NS





# Travel Intentions (post-ads)


*The advertising positively influences travel intentions to NS.*






# Travel Intentions (post-ads)

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



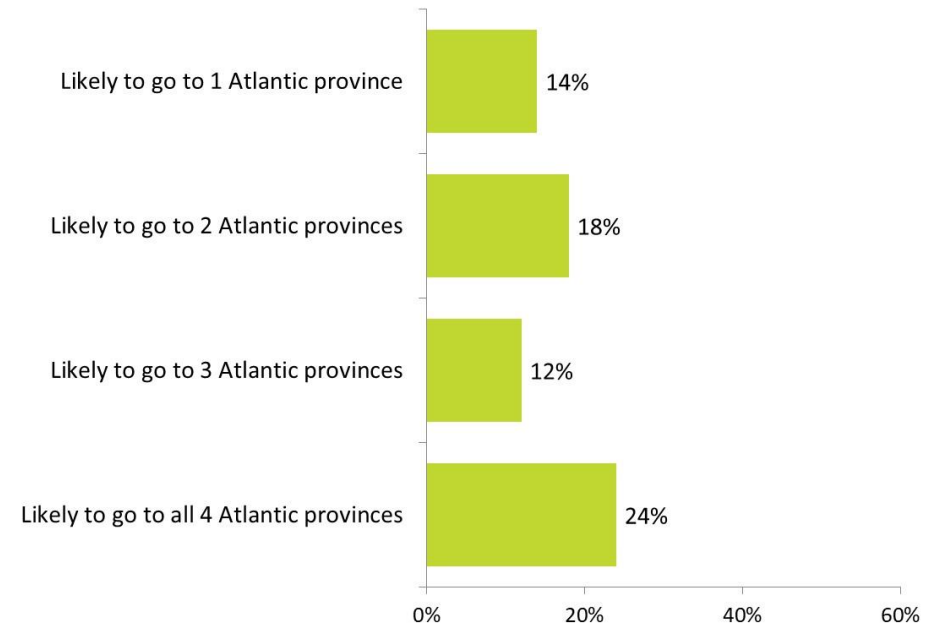
**After seeing the ads for all four Atlantic Canada provinces....**

**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.

