

# UK Consumer Research

Presented: September 20, 2011

Survey Conducted: March, 2011



# Background

- ACTP is targeting long-haul pleasure travellers in the United Kingdom.
- ACTP's primary goal is to raise the region's profile as a vacation destination.
  - The focus of marketing efforts is on engaging travellers through direct-to-consumer advertising campaigns ...
  - and a special UK consumer website, ...
  - as well as through travel trade partnerships.
- Results of this research are to assist with ACTP campaign development going forward.

# Objectives

The research program was designed to achieve the following:

- To profile UK long-haul travellers in terms of their:
  - Current travel behavior and future travel intentions;
  - Destinations visited and planned to visit;
  - Sources of information used in travel planning;
  - Travel purchase process;
  - Inspirations, motivations and activities that motivate their travel.
- To determine awareness of Atlantic Canada overall and by province.
- To measure interest in, and likelihood of visiting, the region.
- To size the market potential.
- To evaluate current positioning in terms of appeal and imagery.

# Study Methodology

Details of online study:

- 1,101 interviews among UK travellers.
- Fieldwork was conducted between March 10-20, 2011.
- Qualifiers: Had to have taken an out of Western Europe pleasure trip of 4+nights within the past 2 years.
- TNS travel panel used.

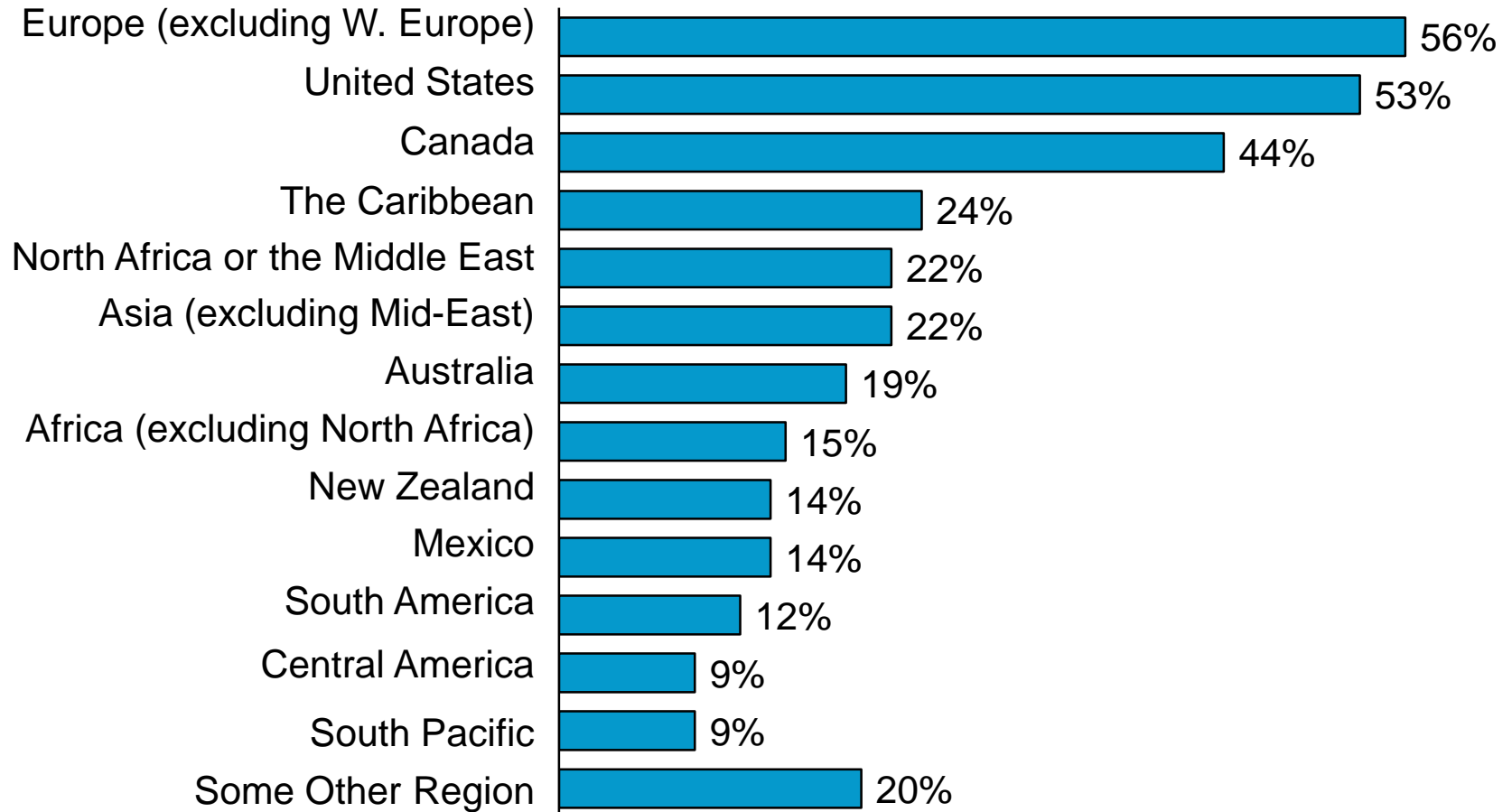
# The Context



# Pleasure Trip Destinations In Past Five Years

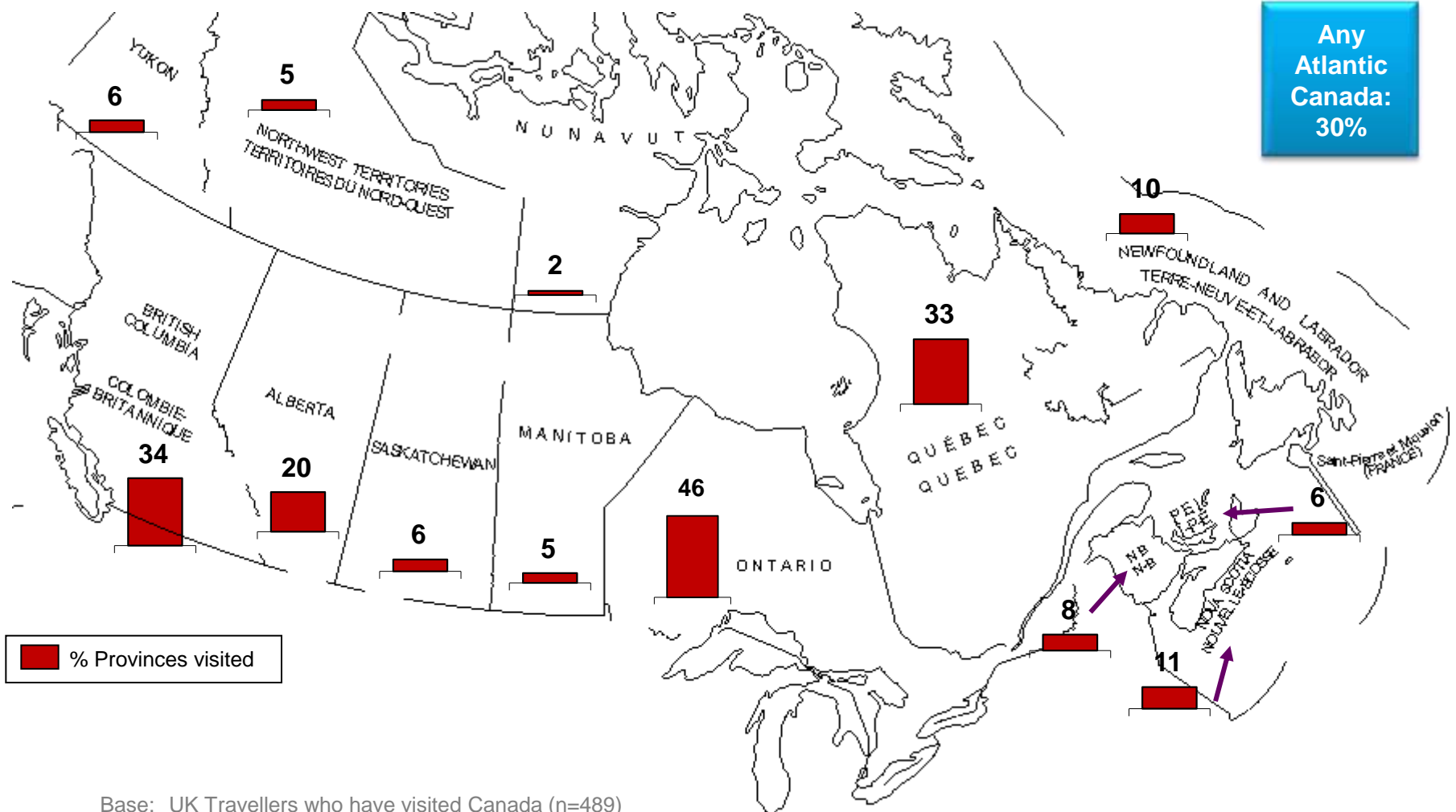
– Excluding Western Europe

**Total UK Travellers**  
**— Past five years destinations**  
(n=1,101)



# Provinces Visited In Past Few Years

## Among UK travellers who have visited Canada



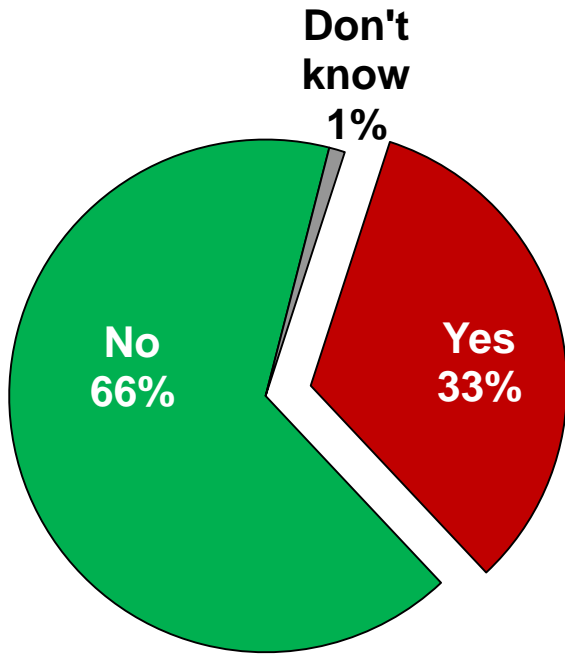
Base: UK Travellers who have visited Canada (n=489)

Q8A. You mentioned that you visited Canada for a leisure trip in the past few years. Which of the following major regions of Canada did you visit on this trip (or these trips)?

Q8B. Which of the following specific provinces or territories did you visit on this/these leisure trip(s) to Canada?

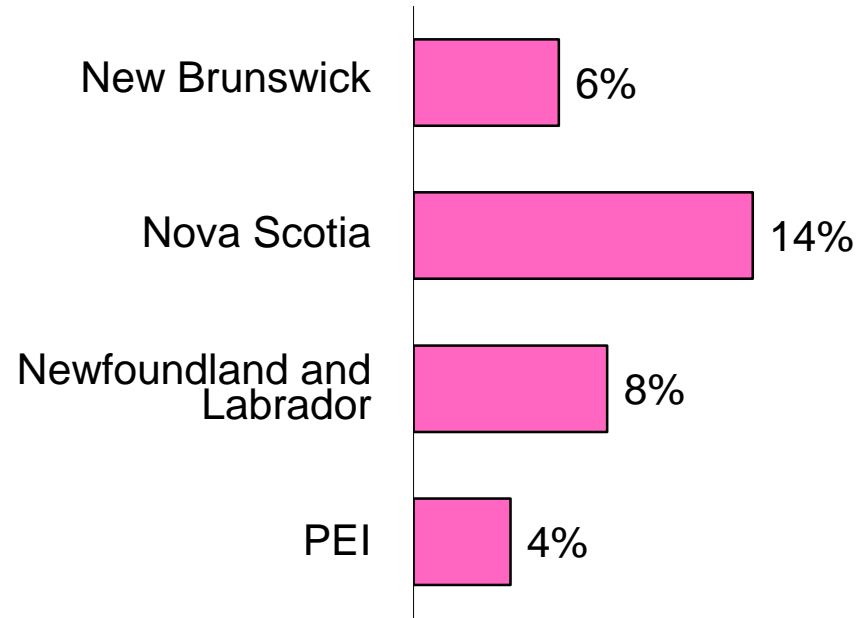
# Incidence Of Friends And Relatives In Canada

## % Of UK Travellers Who Have Friends Or Relatives In Canada



Among those who have friends or relatives in Canada

## Province Where Friends Or Relatives Live



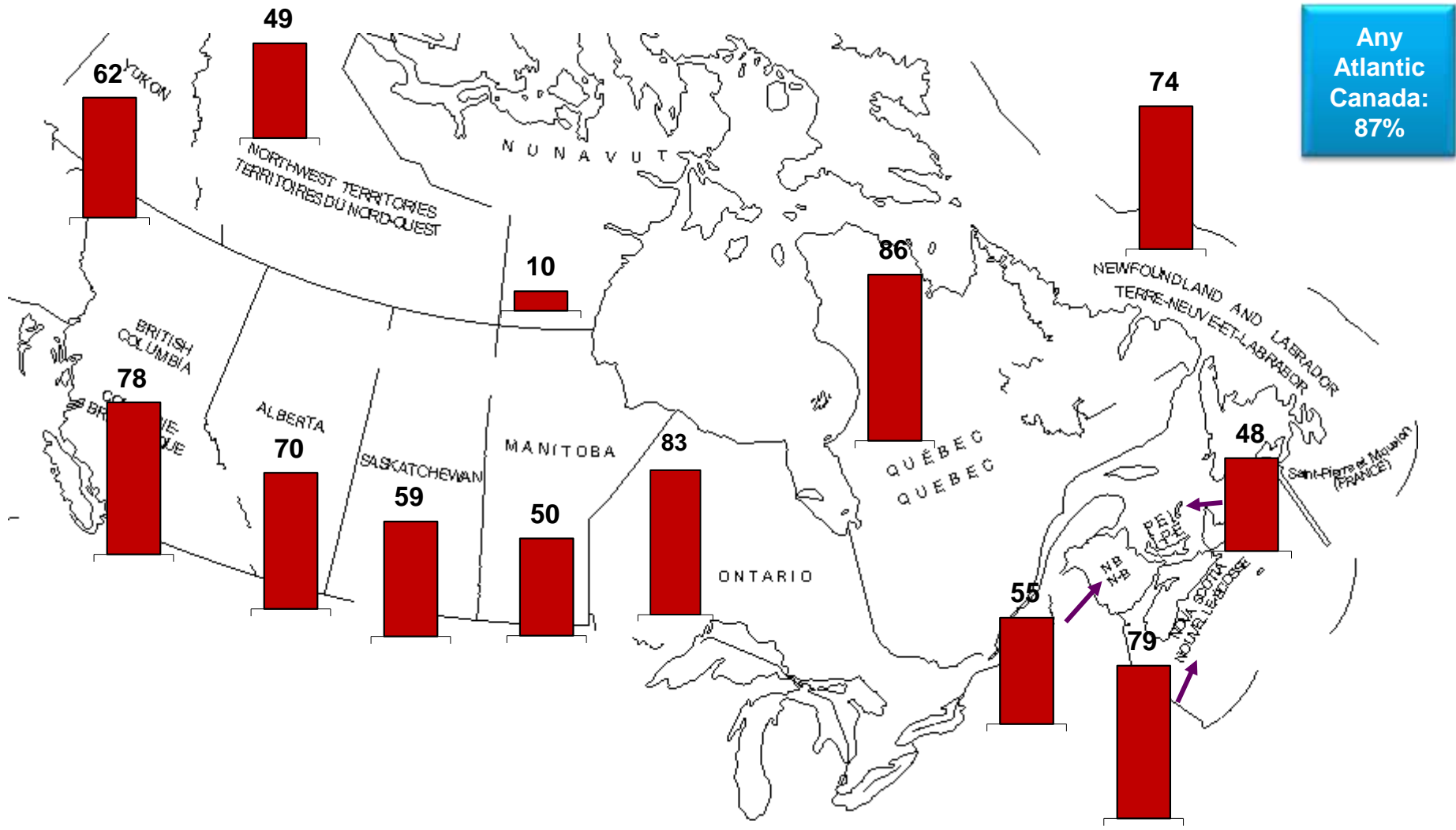
**Atlantic Canada Net: 26%**  
**Rest of Canada Net: 77%**

# Atlantic Canada Momentum



# Awareness Of Canadian Provinces And Territories

## Among UK travellers

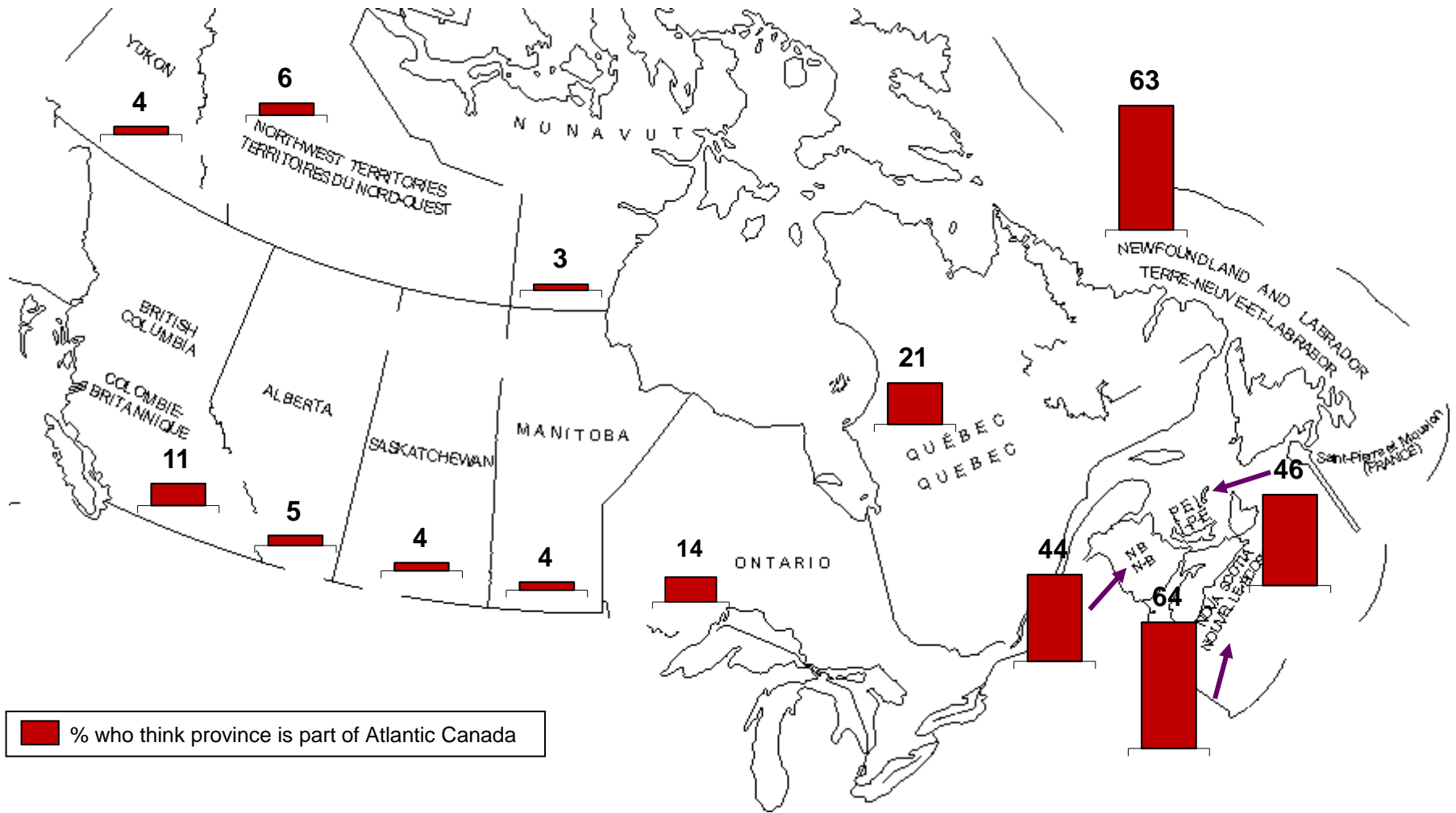



Base: UK Travellers (n=1,101)

Q7A. Which of the following Canadian regions are you quite certain that you have heard of before?

Q7B. And, which of the following Canadian provinces and territories are you quite certain that you have heard of before?

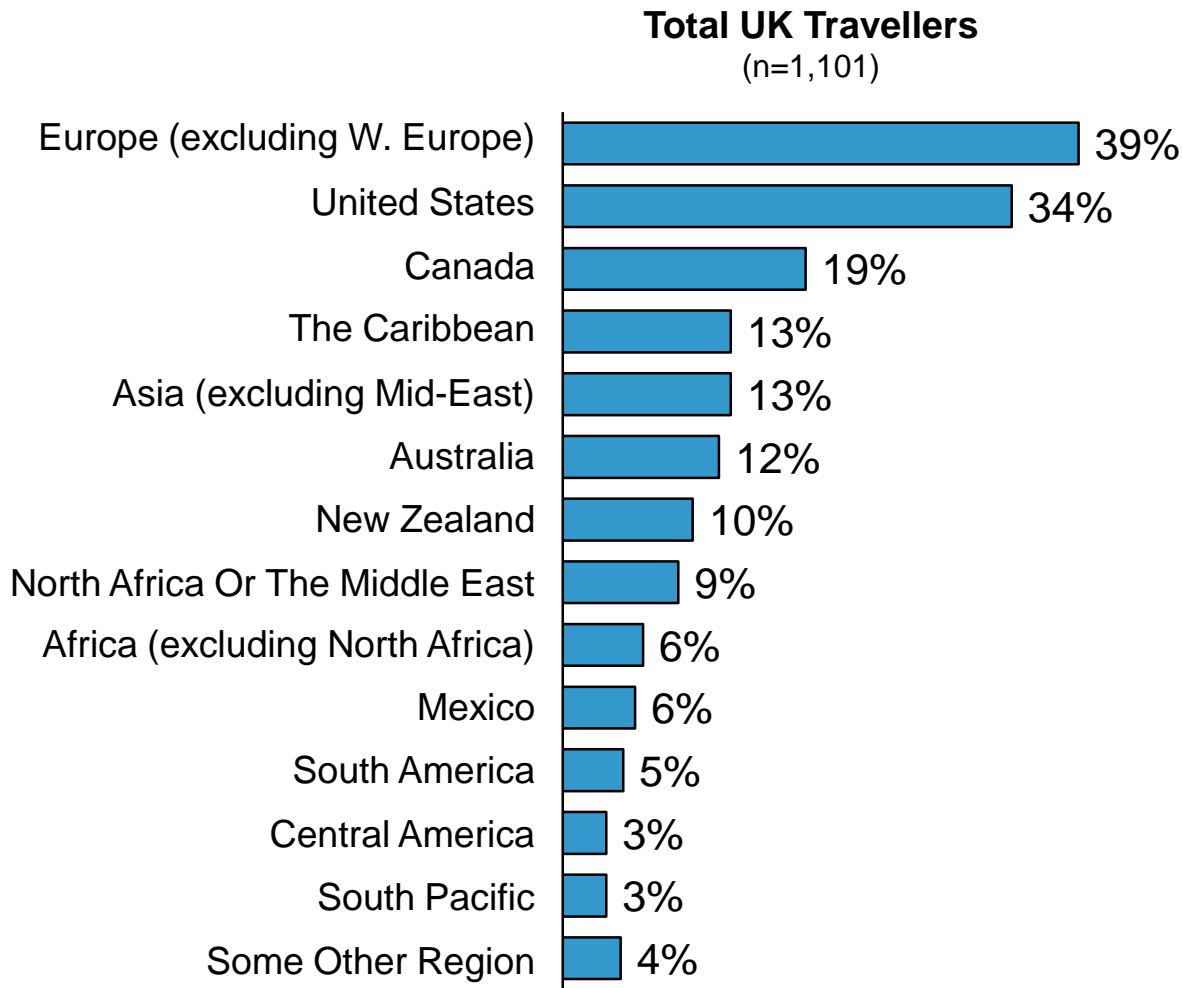
# Presumed Composition Of Atlantic Canada Region



 % who think province is part of Atlantic Canada

# Future Pleasure Trips In The Next 2 Years

Among UK travellers



Intend To Visit Atlantic Canada In The Next 2 Years (n=77) %
43
62
100
27
21
32
27
16
14
15
23
12
13
9

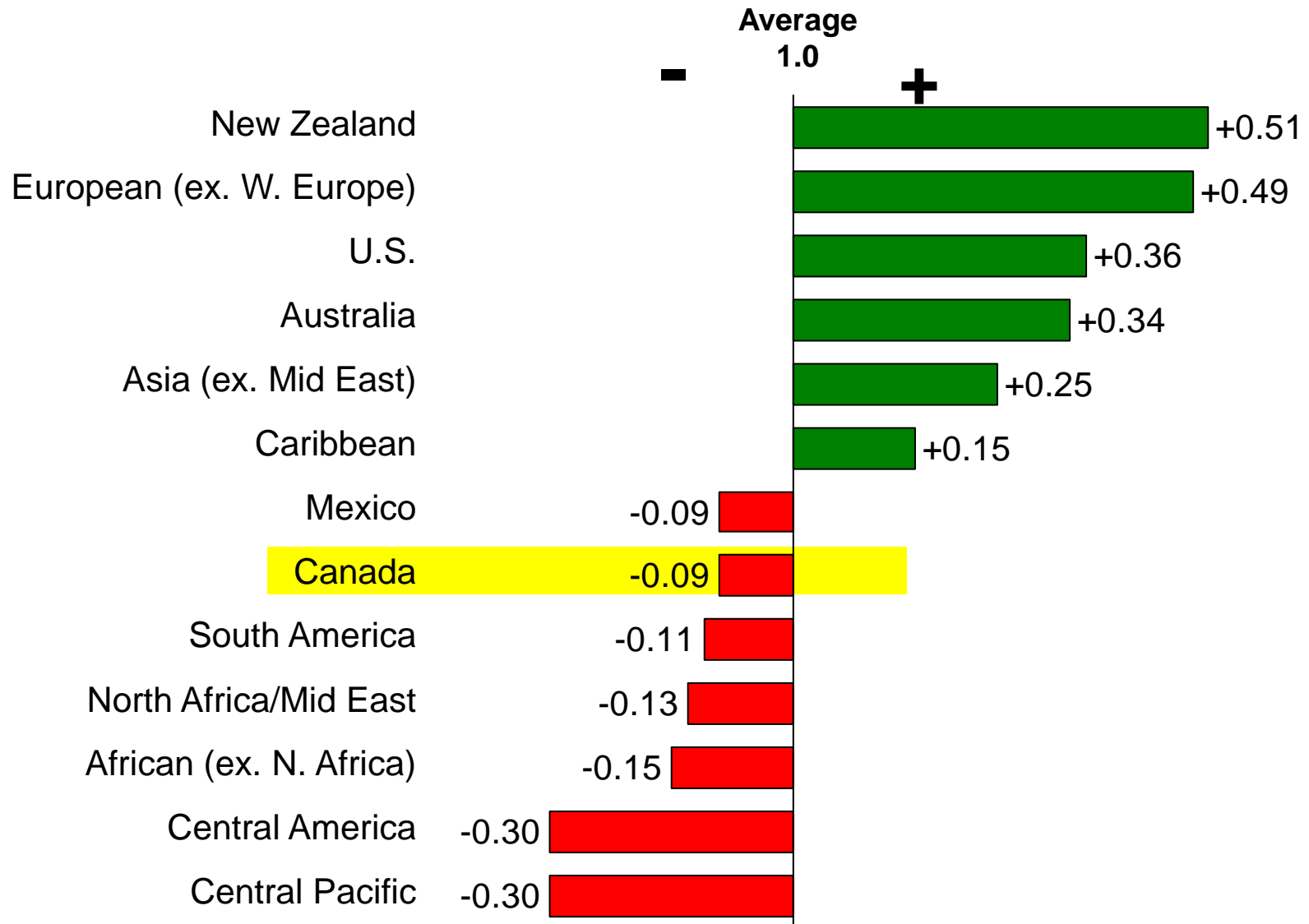
Those driven to Atlantic Canada exhibit heightened interest in competitive destinations



Significantly higher than total at 95%

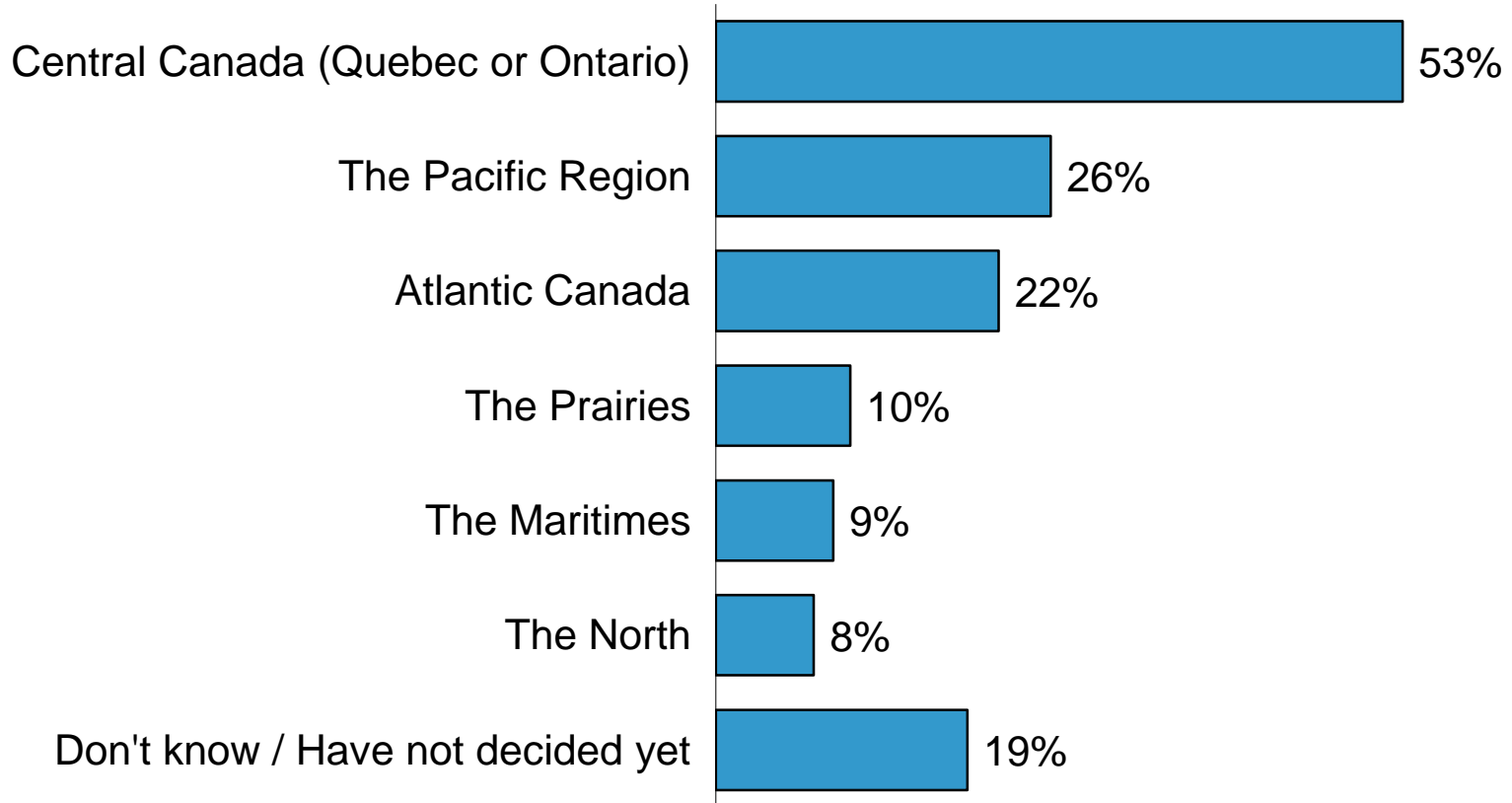
Q6. To which, if any, of the following countries or regions are you likely to take a leisure trip of four or more nights between May 1st and October 31st, in the next two years?

# Future Momentum Index\* (future interest vs. past experience) Among UK travellers



# Regions Of Canada Likely To Visit In Next 2 Years

Among travellers intending to visit Canada

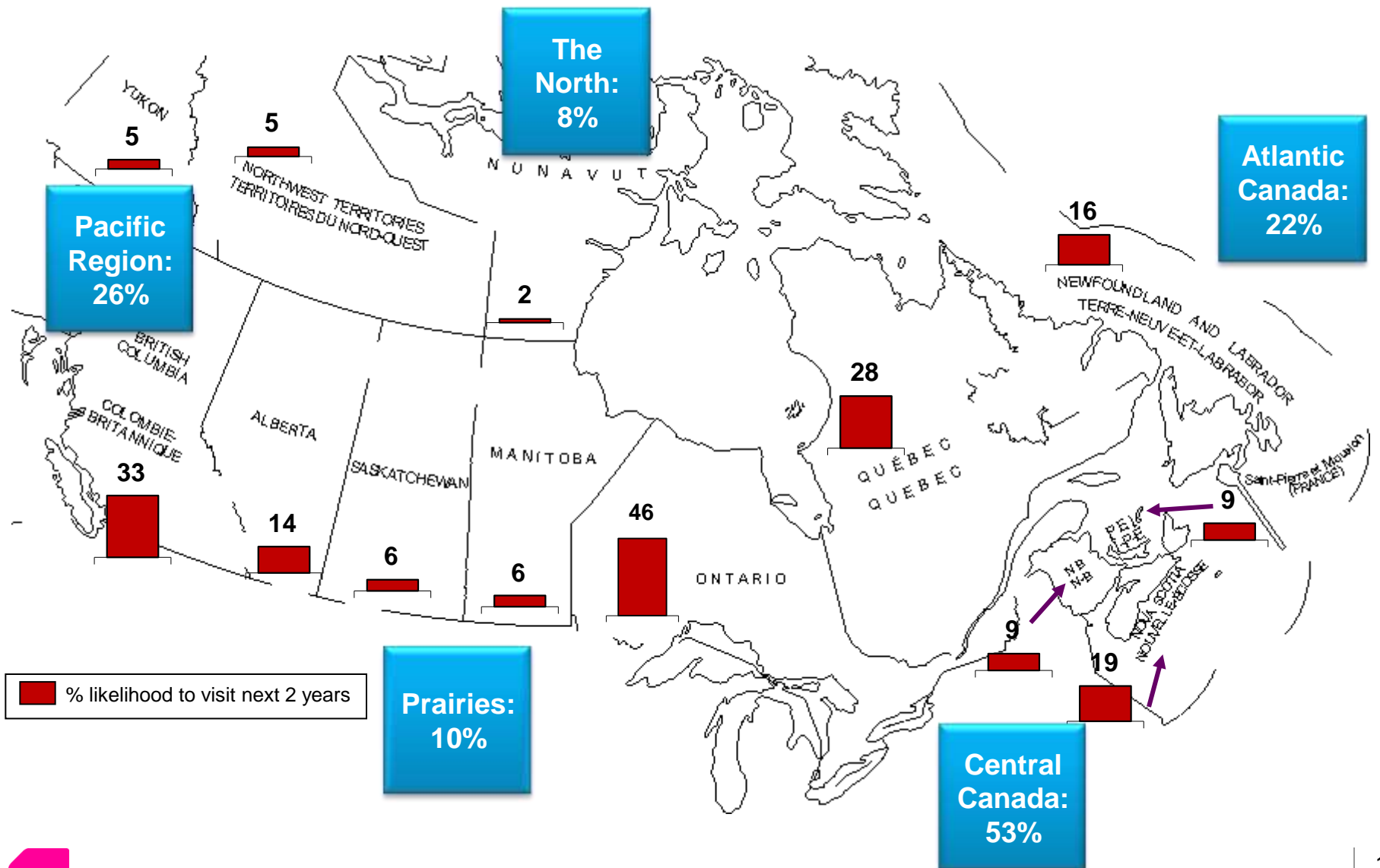


Base: Likely Visitors To Canada With Knowledge Of Canadian Regions (n=205)

Q9a. Which of the following major regions of Canada are you most likely to visit in the next 2 years?

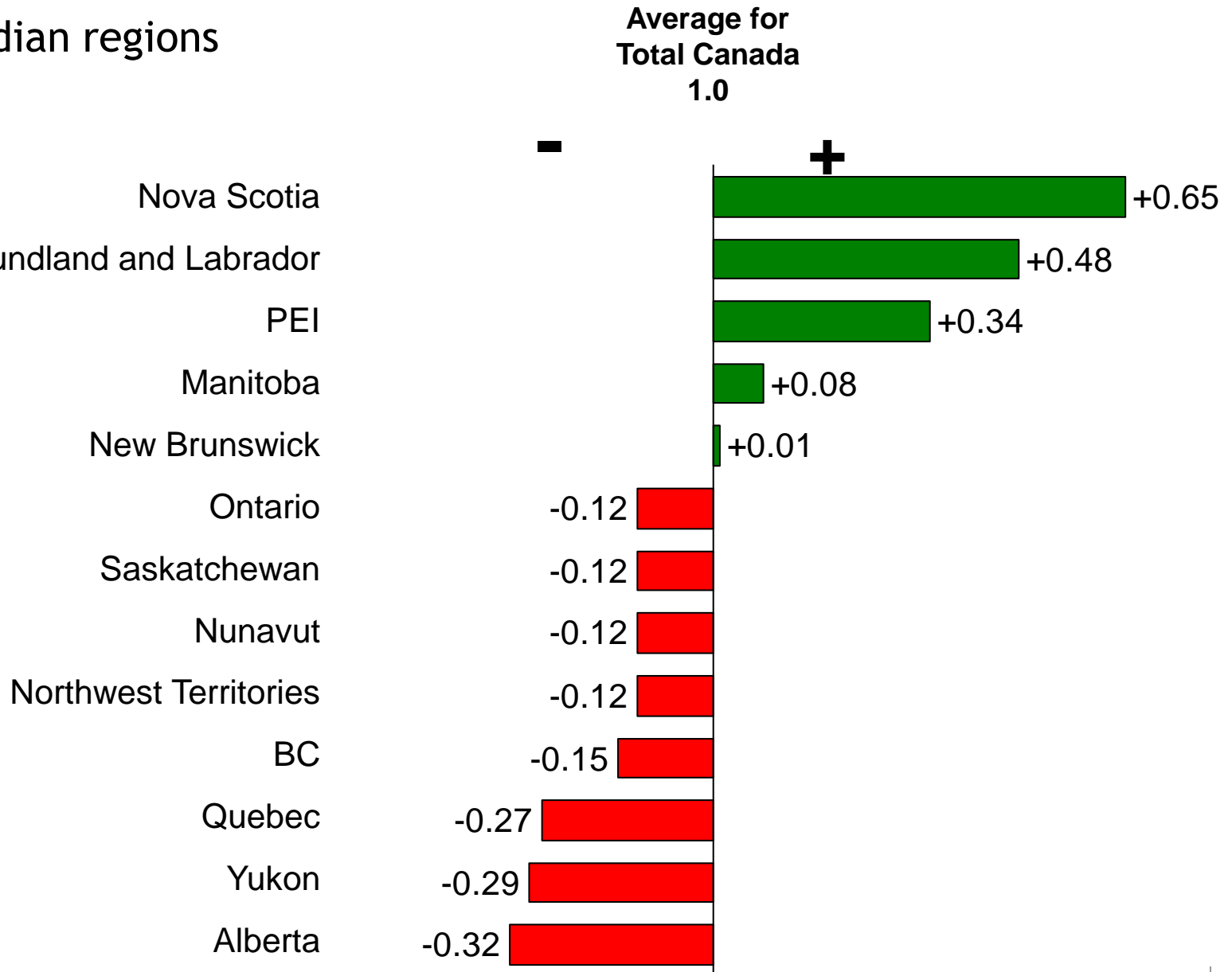
Q9b. And which of the following specific provinces or territories are you most likely to visit in the next 2 years?

# Canadian Provinces And Territories Likely To Visit In Next 2 Years Among UK travellers



# Future Momentum Index\*

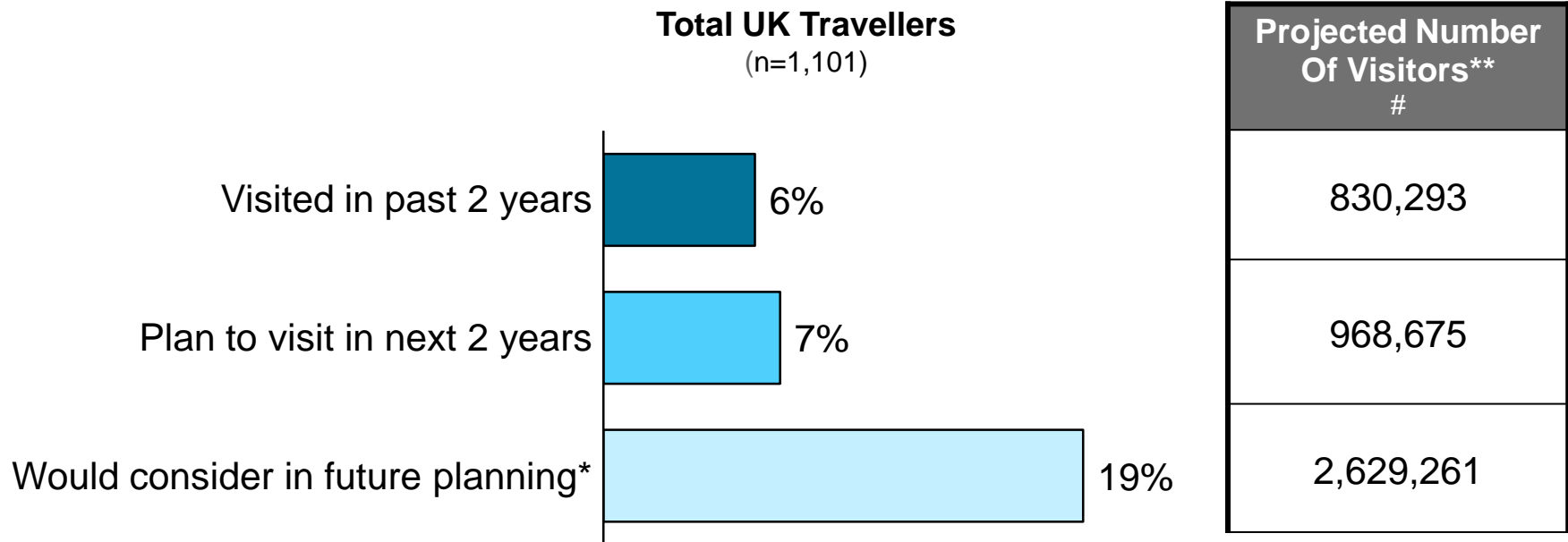
– Canadian regions



# Sizing The Opportunity



# Sizing The Market For Atlantic Canada



\* Based on most popular Atlantic province among travellers in each source market.

\*\* From UK Census Figures and survey qualification incidence data.

Q3. Thinking of all leisure trips of four or more nights outside of Western Europe that you have taken, between May 1st and October 31st, during the past few years, which destinations did you visit?

Q9a. Which of the following major regions of Canada are you most likely to visit in the next 2 years?

Q9b. And which of the following specific provinces or territories are you most likely to visit in the next 2 years?

# Activity Profile And Opportunity For Atlantic Canada



# Activities / Attractions Participated In

– Previous leisure trip (top 15 activities)

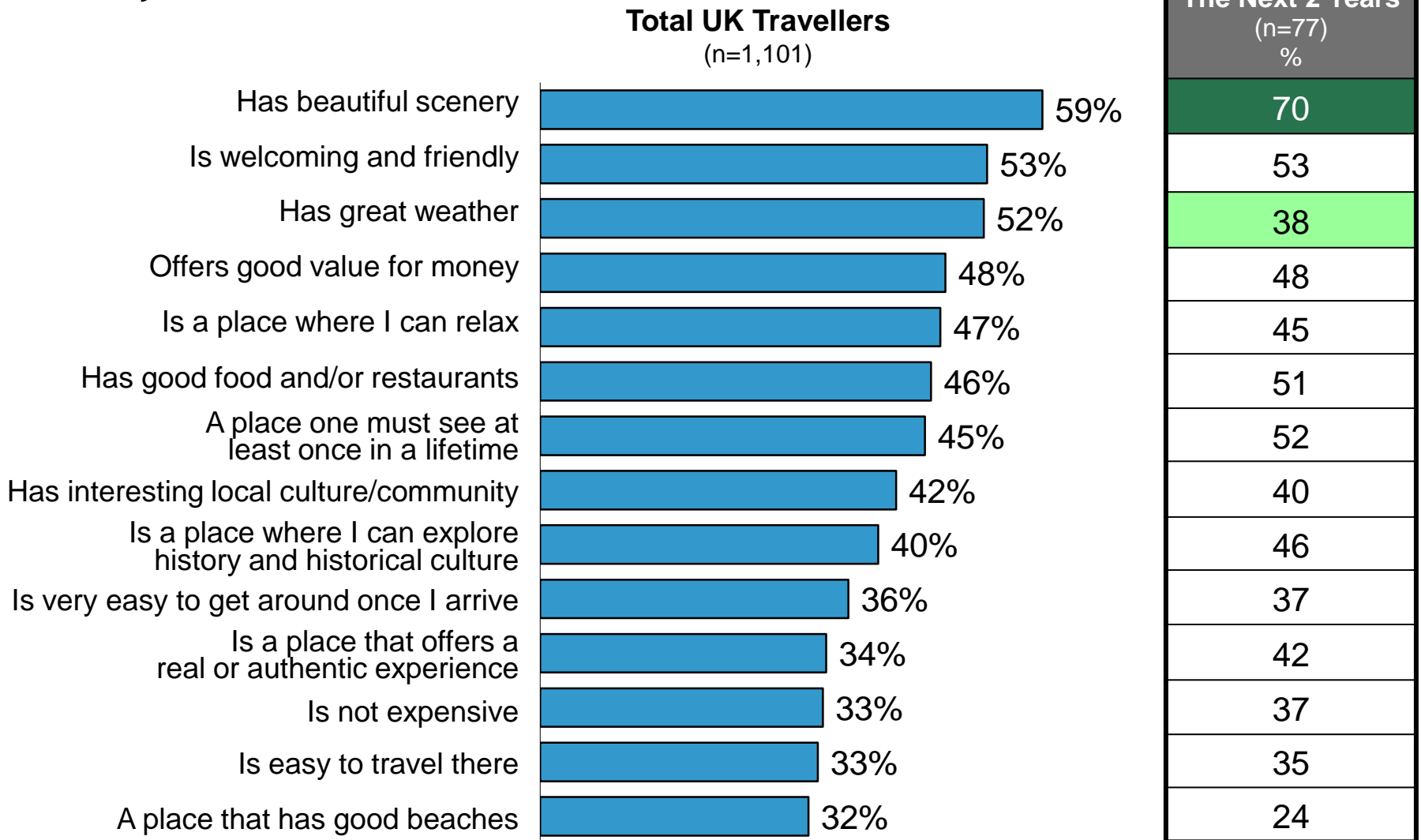
	Total Travellers (n=1,101) %	Intend To Visit Atlantic Canada In The Next 2 Years (n=77) %
Seeing beautiful scenery	59	60
Sampling local food / wine	56	50
City activities	53	61
Seeing historical and cultural attractions	50	54
Visiting natural parks and protected areas	42	49
City cultural activities	41	56
Experiencing unique character and local lifestyles	38	47
Exploring natural wonders	37	49
Observing wildlife in their natural habitats	33	48
Multi-day touring on your own by car or train	27	32
Exploring nature in close proximity to a city	25	40
Entertainment activities	24	38
Multi-day guided group tours by bus or train	23	37
Family entertainment activities	21	31
Participating in summer activities	18	29

 Significantly higher than total at 95%

Q5. In which of the following activities did you participate at least once while on any of these recent leisure trips outside of Western Europe?

# Factors Impacting Destination Selection

– Any destination



**Intend To Visit In The Next 2 Years**  
(n=77)  
%

70
53
38
48
45
51
52
40
46
37
42
37
35
24

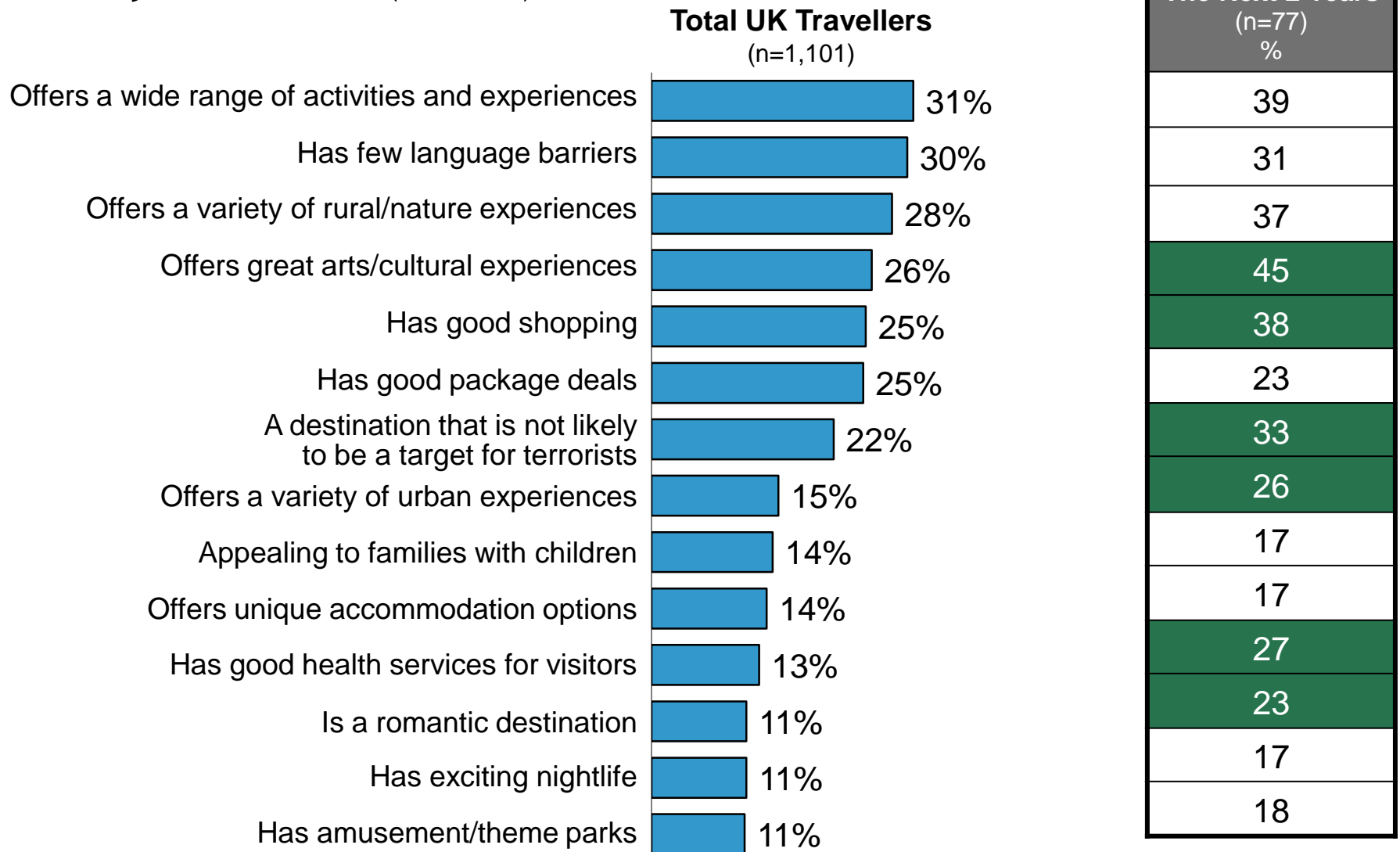
■ Significantly higher than total at 95%

■ Significantly lower than total at 95%

Q4. Please think for a moment about all of these places outside of Western Europe that you have travelled to trips over the past few years. When considering your choices, which of the following characteristics would you say were particularly important to you in selecting the destinations you visited?

# Factors Impacting Destination Selection

– Any destination (cont'd)



**Intend To Visit In The Next 2 Years (n=77) %**

39
31
37
45
38
23
33
26
17
17
27
23
17
18

■ Significantly higher than total at 95%

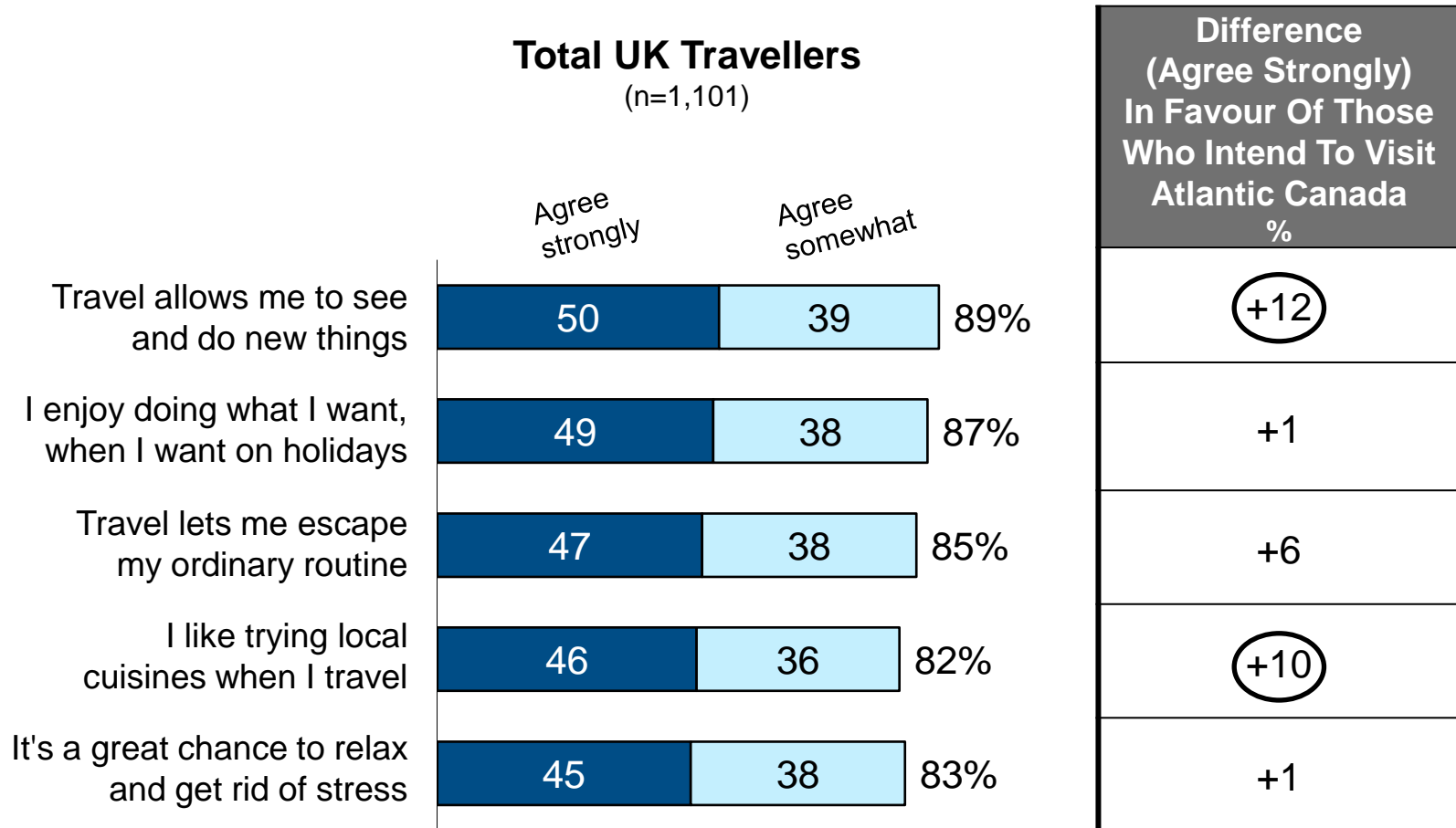
Q4. Please think for a moment about all of these places outside of Western Europe that you have travelled to trips over the past few years. When considering your choices, which of the following characteristics would you say were particularly important to you in selecting the destinations you visited?

# Brand Image



# Benefits Associated With Travel

## Tier 1



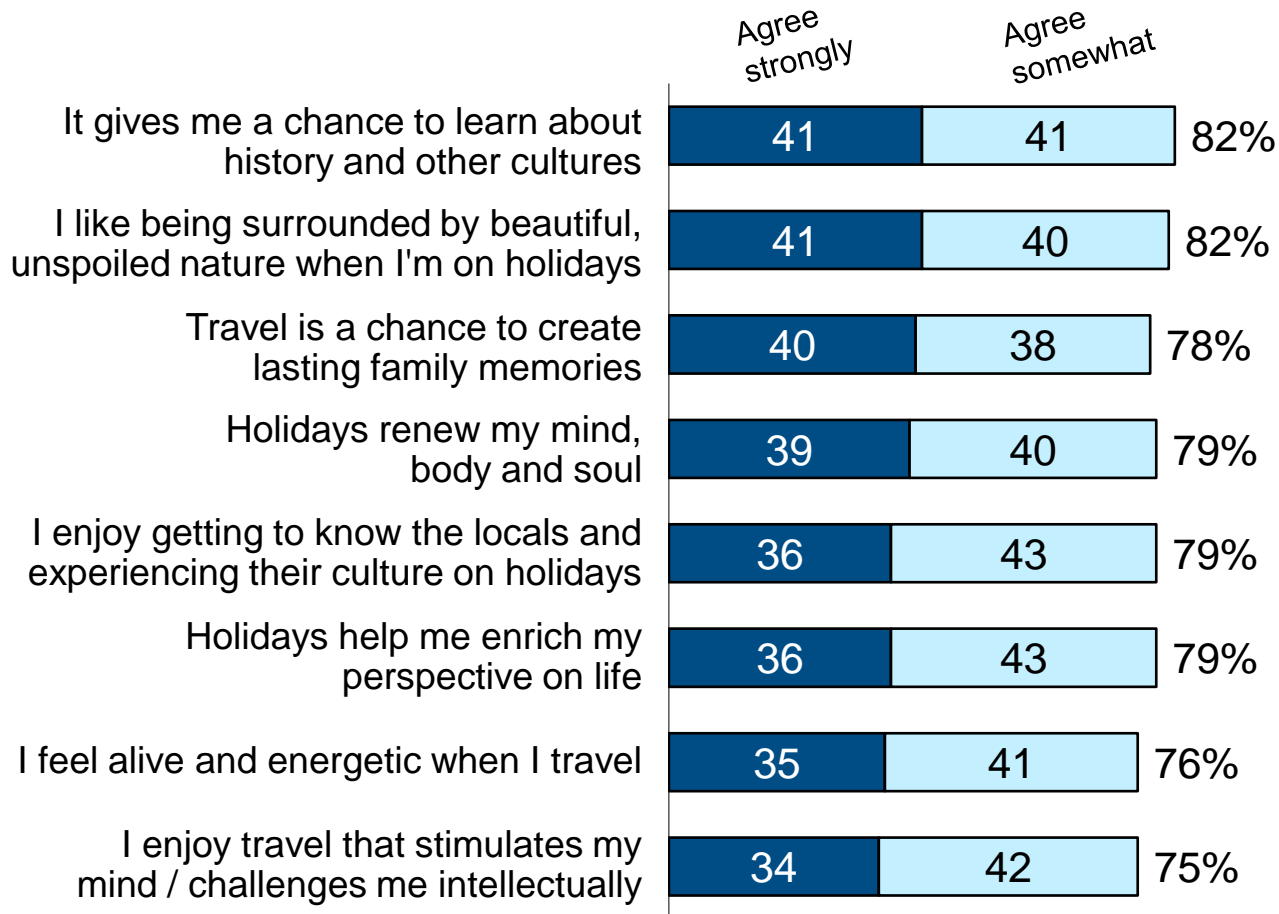
○ Above average gap

Q22. Now we would like you to consider some specific benefits that people associate with leisure travel. Please indicate how much you agree or disagree with the following statements about the possible benefits of travel.

# Benefits Associated With Travel

## Tier 2

**Total UK Travellers**  
(n=1,101)



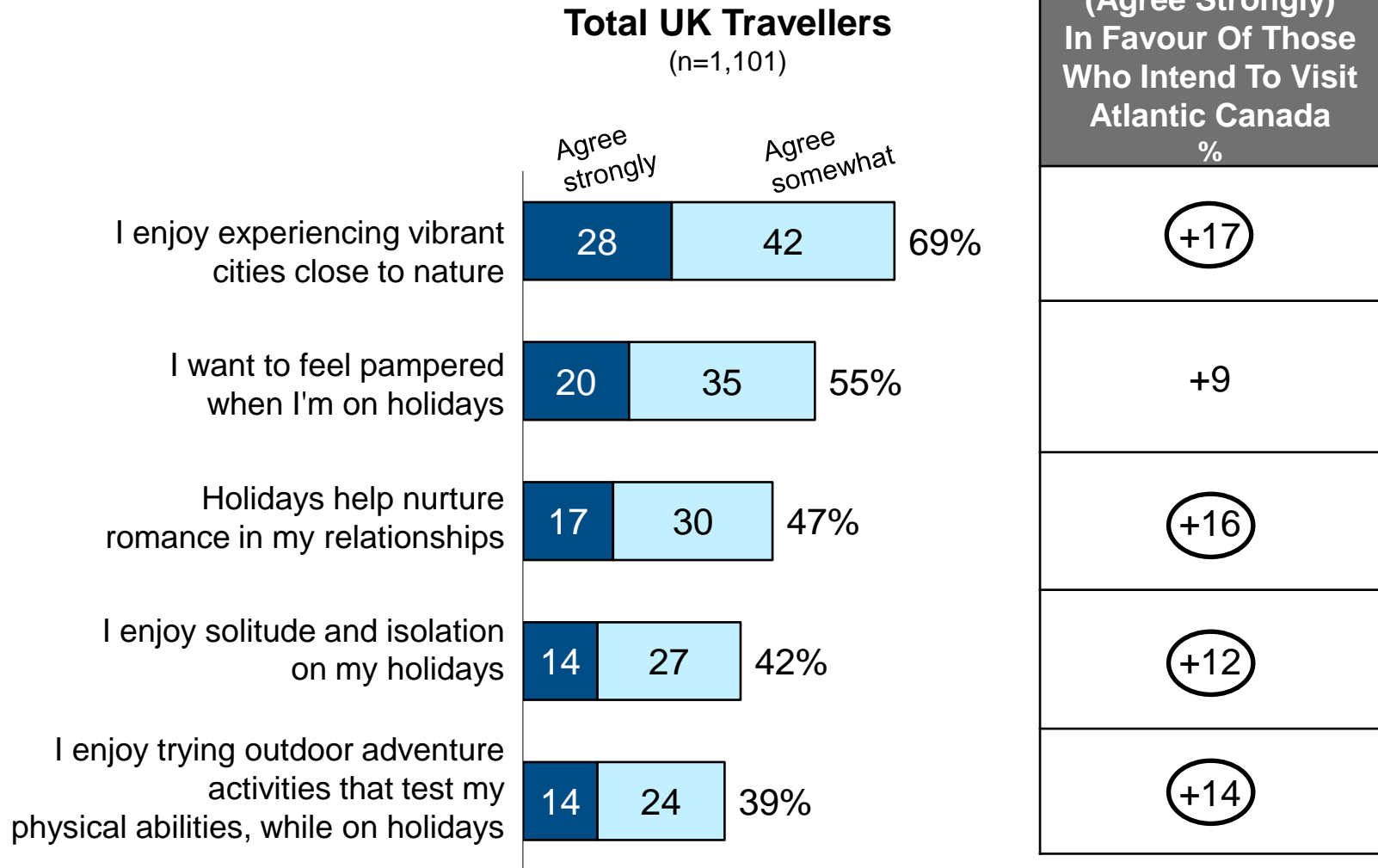
Difference (Agree Strongly) In Favour Of Those Who Intend To Visit Atlantic Canada %
+7
+8
+7
<b>+11</b>
+3
<b>+10</b>
+5
+8

○ Above average gap

Q22. Now we would like you to consider some specific benefits that people associate with leisure travel. Please indicate how much you agree or disagree with the following statements about the possible benefits of travel.

# Benefits Associated With Travel

## Tier 3



○ Above average gap

Q22. Now we would like you to consider some specific benefits that people associate with leisure travel. Please indicate how much you agree or disagree with the following statements about the possible benefits of travel.

# Association With Specific Attributes

Among total UK travellers aware of each region

	Percent Of UK Travellers Associating ... With Specific Attributes Among Those Aware				
	Atlantic Canada (n=961) %	Prince Edward Island (n=638) %	New Brunswick (n=696) %	Nova Scotia (n=905) %	Newfoundland (n=864) %
Friendly, hospitable people	49	56	55	51	52
Excellent wildlife viewing (e.g. whale watching)	48	53	54	49	51
Excellent fresh seafood	48	56	55	49	50
Beautiful fall/autumn colours	44	50	49	45	47
Unique coastal scenery (e.g. scenic beaches, dunes)	42	46	46	43	45
Historically linked to British heritage and immigration	40	48	46	42	43
Natural wonders (e.g. very high/low ocean tides)	37	41	42	38	39
The traditional way of life (e.g. small fishing villages)	37	43	42	38	39
Excellent fishing	34	37	37	34	35
Authentic maritime experience	30	38	36	31	32
Has non-stop flights from UK	30	36	33	32	32
Interesting cities close to nature	27	30	30	28	28
Quaint villages	27	35	33	28	29



Q13. You may or may not be very familiar with Atlantic Canada. However, based on your past experience, general impressions, or best guess, which of the following words and phrases would you say describe Atlantic Canada extremely well?

# Association With Specific Attributes

Among total UK travellers aware of each region

	Percent Of UK Travellers Associating ... With Specific Attributes Among Those Aware				
	Atlantic Canada (n=961) %	Prince Edward Island (n=638) %	New Brunswick (n=696) %	Nova Scotia (n=905) %	Newfoundland (n=864) %
Excellent hiking	21	25	24	21	22
Cool even in summer	20	23	22	21	21
Unique culture (music, singing, dancing)	19	24	22	20	20
Unique architecture (e.g. lighthouses)	19	25	23	20	21
Rejuvenating experience	19	22	21	19	20
Excellent kayaking	18	20	20	18	18
Very quiet in the evening	18	21	21	18	19
Unique accommodation opportunities (e.g. lighthouses, train cars)	16	19	18	16	16
Warm saltwater beaches	8	9	9	8	8
Not much to see and do beyond nature	8	8	8	8	8
Limited shopping	7	7	7	7	7
Not very different from the UK sea coast	6	7	7	7	7
World class golf courses	5	6	5	5	5

# Differences In Association With Atlantic Canada By Level Of Interest In Travelling There

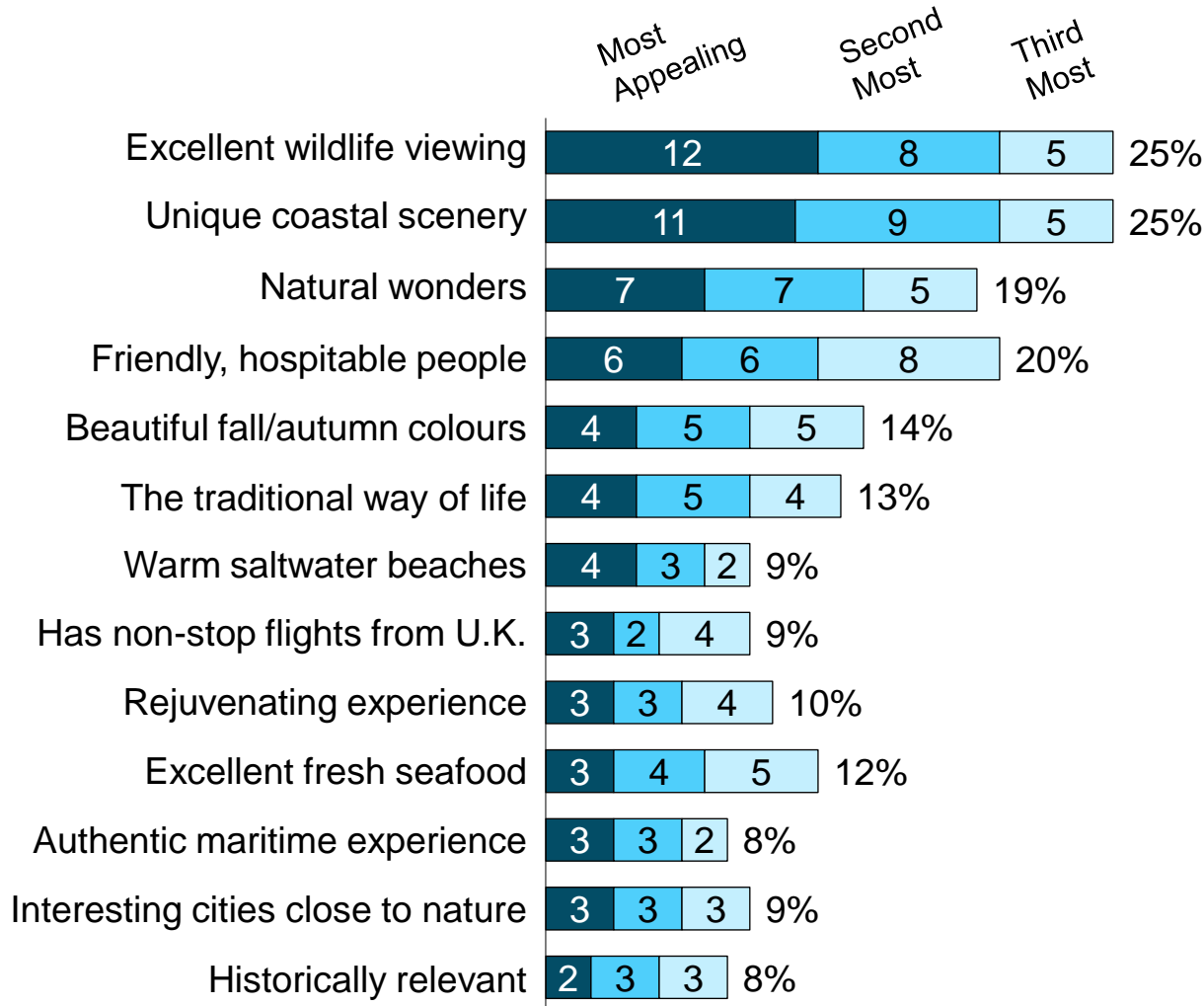
Total UK travellers aware of Atlantic Canada vs. those with intent

	Total UK Travellers (Aware Of Atlantic Canada) (n=961) %	Those With Intent To Visit (n=77) %	Difference Total vs. Intent	
			-	+
Unique architecture (e.g. lighthouses)	19	41		22
Quaint villages	27	42		15
Historically linked to British heritage and immigration	40	51		11
Interesting cities close to nature	27	37		10
Very quiet in the evening	18	28		10
Unique accommodation opportunities (e.g. lighthouses, train cars)	16	26		10
Excellent fresh seafood	48	57		9
Unique coastal scenery (e.g. scenic beaches, dunes)	42	51		9
Excellent fishing	34	43		9
Unique culture (music, singing, dancing)	19	28		9
Friendly, hospitable people	49	57		8
Has non-stop flights from U.K.	30	38		8

 Statistically significant difference at 95%

Q13. Now, we would like you to rate some travel destinations on special attributes or characteristics. The ratings you give could be based on your past experience or general impressions from anything you have seen, heard or read. Now, on a scale from 1 to 10, where a "1" is poor and a "10" is excellent, how would you rate [pipe in destination] for...

# Ranking Of Atlantic Canada Features



Intend To Visit Atlantic Canada (Total) (n=77) %
22
25
23
20
13
14
4
14
9
11
21
6
13

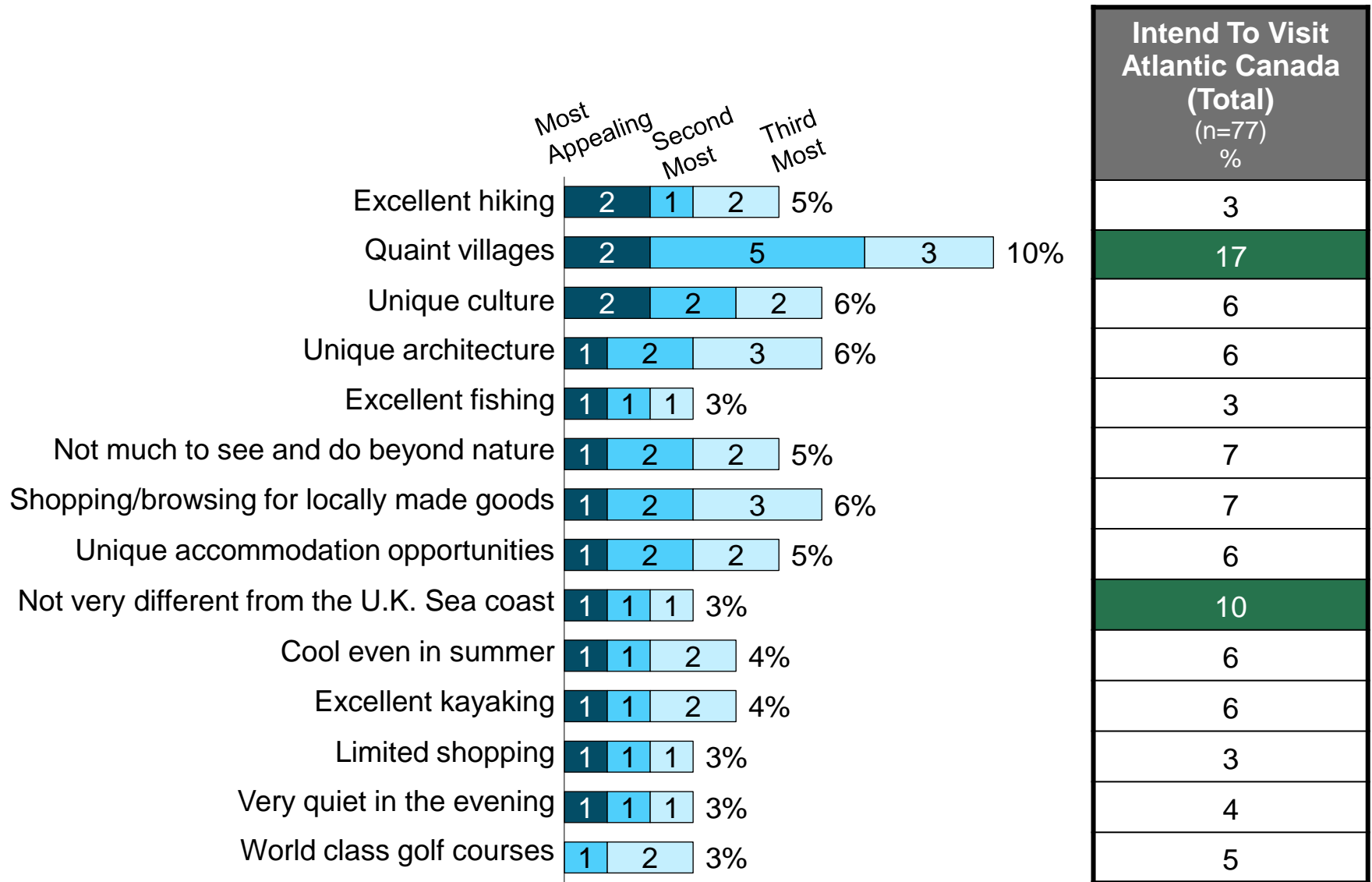


Significantly higher than total at 95%

Base: Total UK Travellers (n=1,101)

Q15. From the following list, please select the three features of Atlantic Canada that appeal most strongly to you personally.

# Ranking Of Atlantic Canada Features (Cont'd)



Significantly higher than total at 95%

Base: Total UK Travellers (n=1,101)

Q15. From the following list, please select the three features of Atlantic Canada that appeal most strongly to you personally.

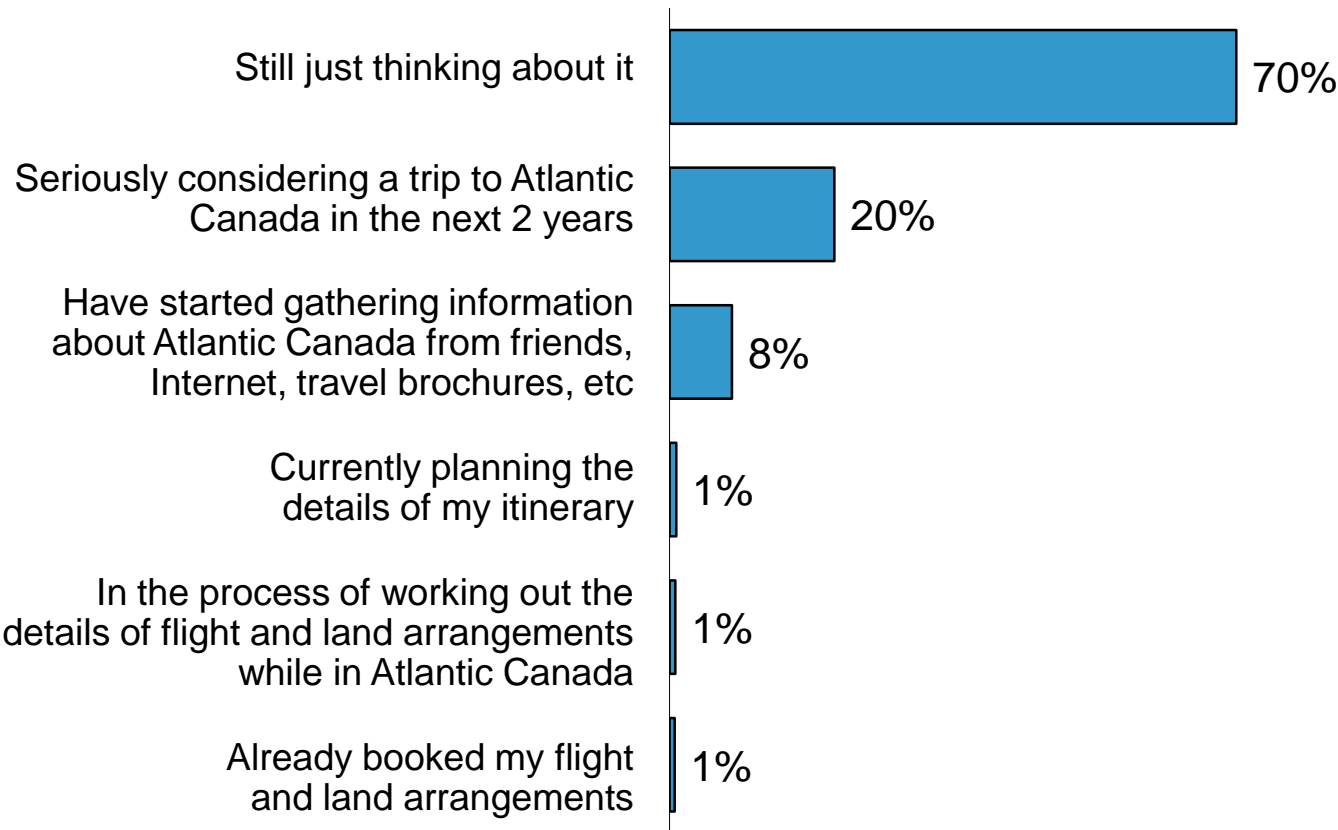
# Trip Planning



# Stage Of Planning

– Future leisure trip to Atlantic Canada

**Among Those Who With General Interest  
In Visiting Atlantic Canada**  
(n=813)



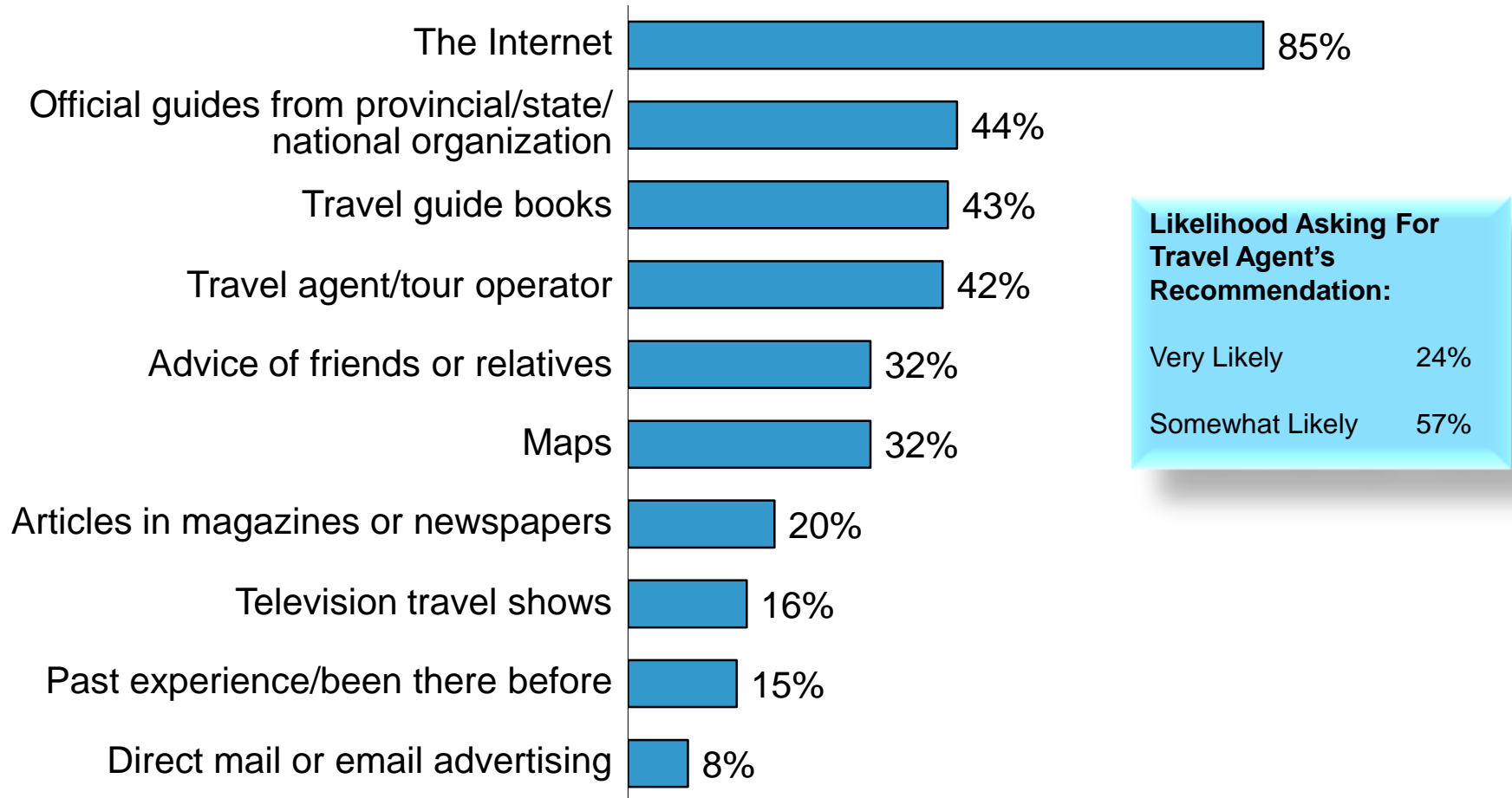
Among Those Who Intend To Visit Atlantic Canada In The Next 2 Years (n=77) %	
Still just thinking about it	40
Seriously considering a trip to Atlantic Canada in the next 2 years	42
Have started gathering information about Atlantic Canada from friends, Internet, travel brochures, etc	9
Currently planning the details of my itinerary	3
In the process of working out the details of flight and land arrangements while in Atlantic Canada	4
Already booked my flight and land arrangements	2



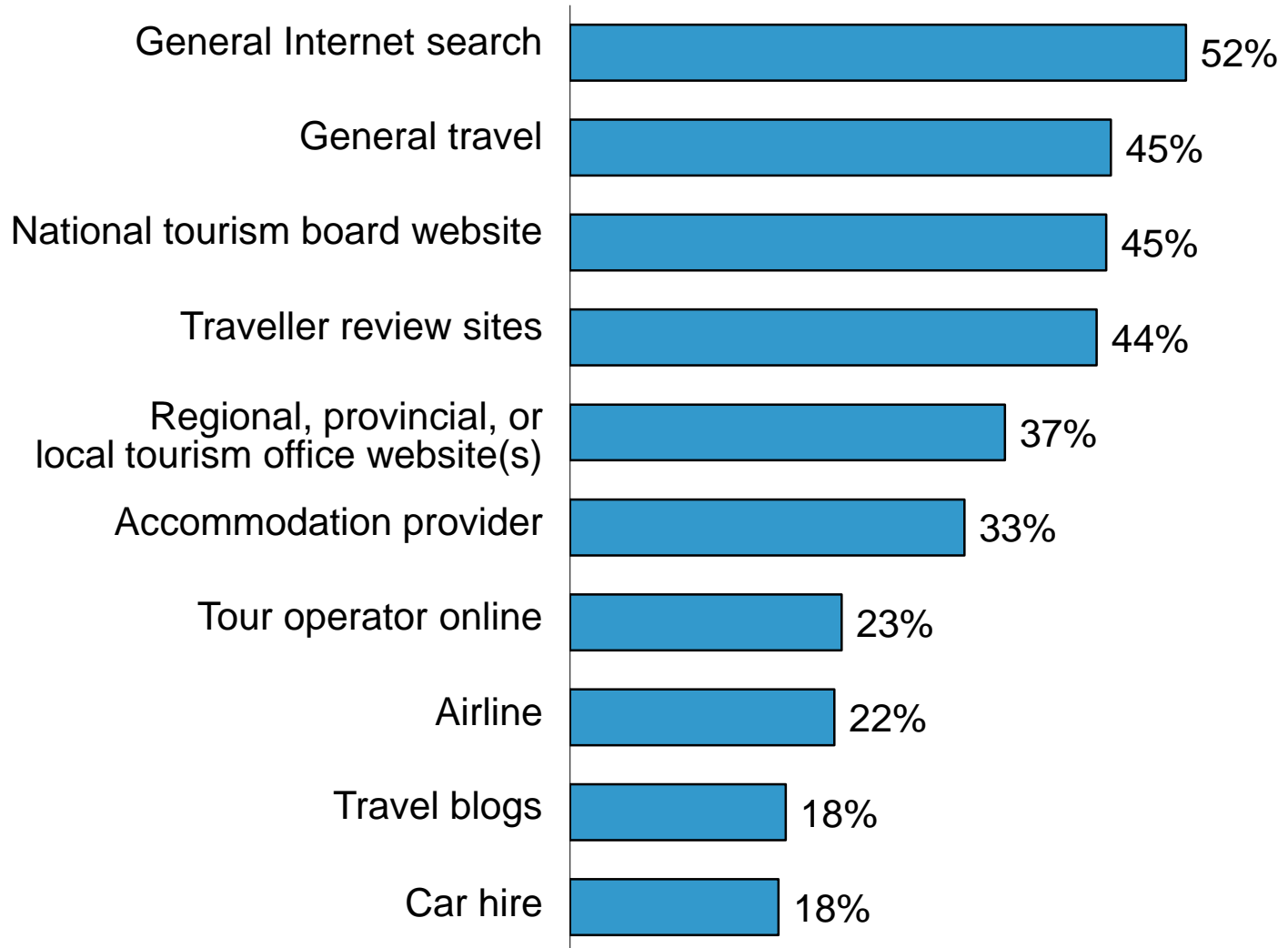
Q12. Thinking about a future leisure trip to Atlantic Canada, please select the one statement that best describes how far along are you in planning/booking this trip.

# Sources/Information For Planning A Trip To Atlantic Canada - Top 10

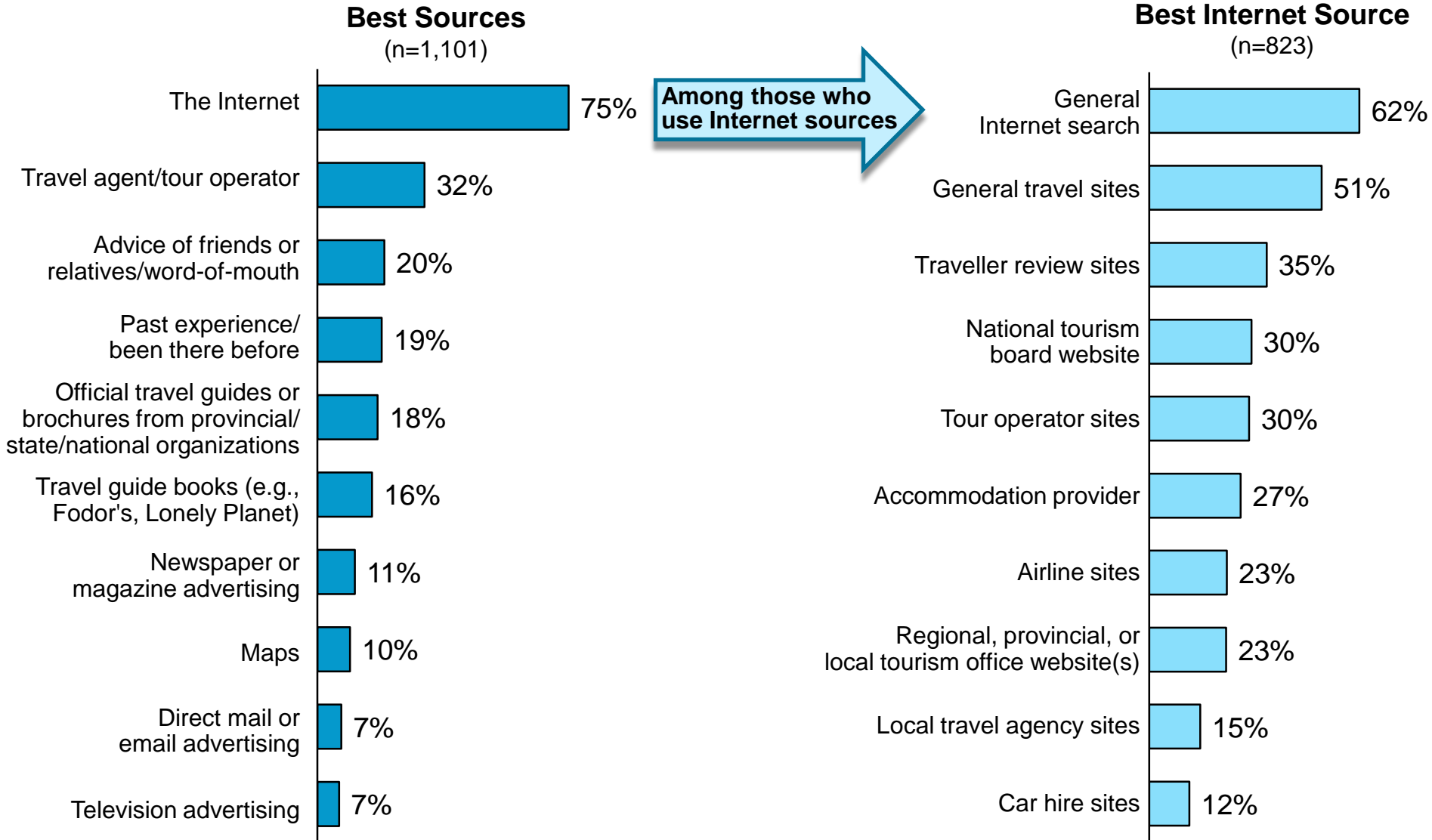
Among those with interest in Atlantic Canada



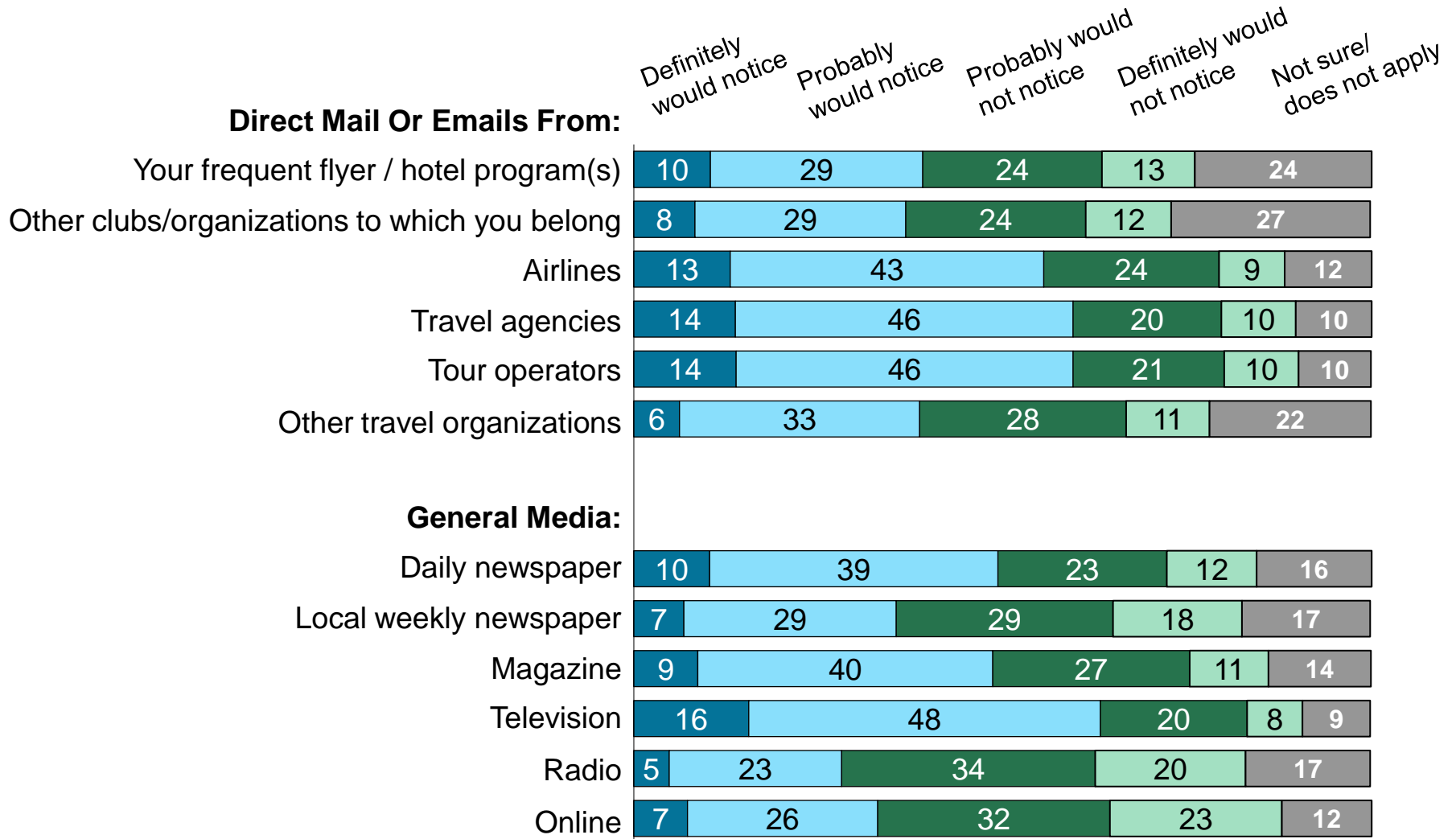
# Top 10 Trip Planning Sites



# Top 10 Sources Of Best Package Deals



# Level Of Attention Paid To Travel Promotions

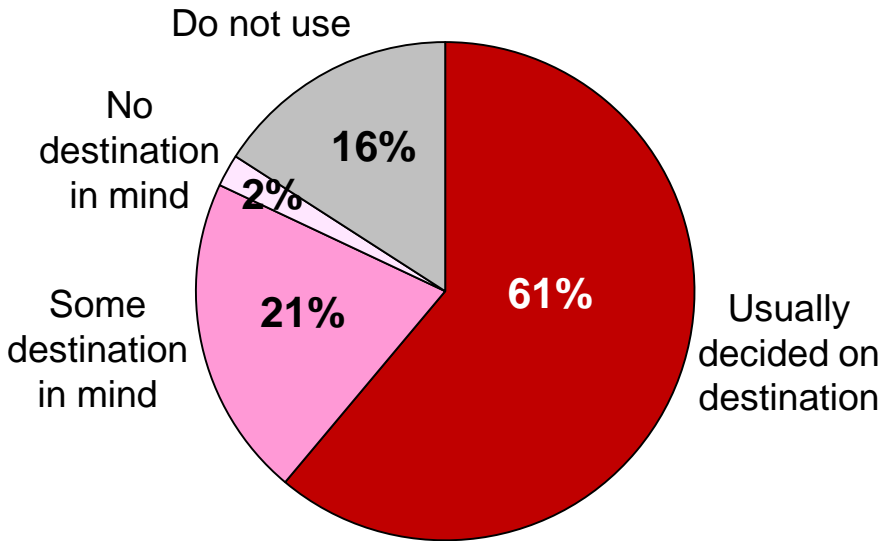


Base: Total UK Travellers (n=1,101)

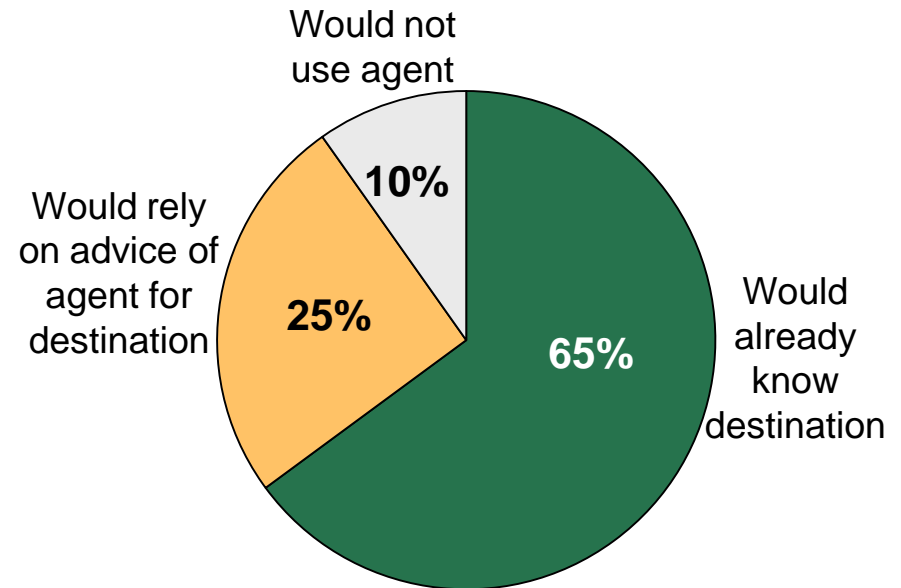
Q21. People are exposed to travel promotions, deals, and special offers from a wide range of sources. How likely are you to pay attention to travel promotions and deals from the following sources?

# Experience With Travel Agents And Tour Operators

## State Of Mind Concerning Destination Before Visiting Travel Agent



## Level Of Reliance On Travel Agent In Deciding on Canadian Destination



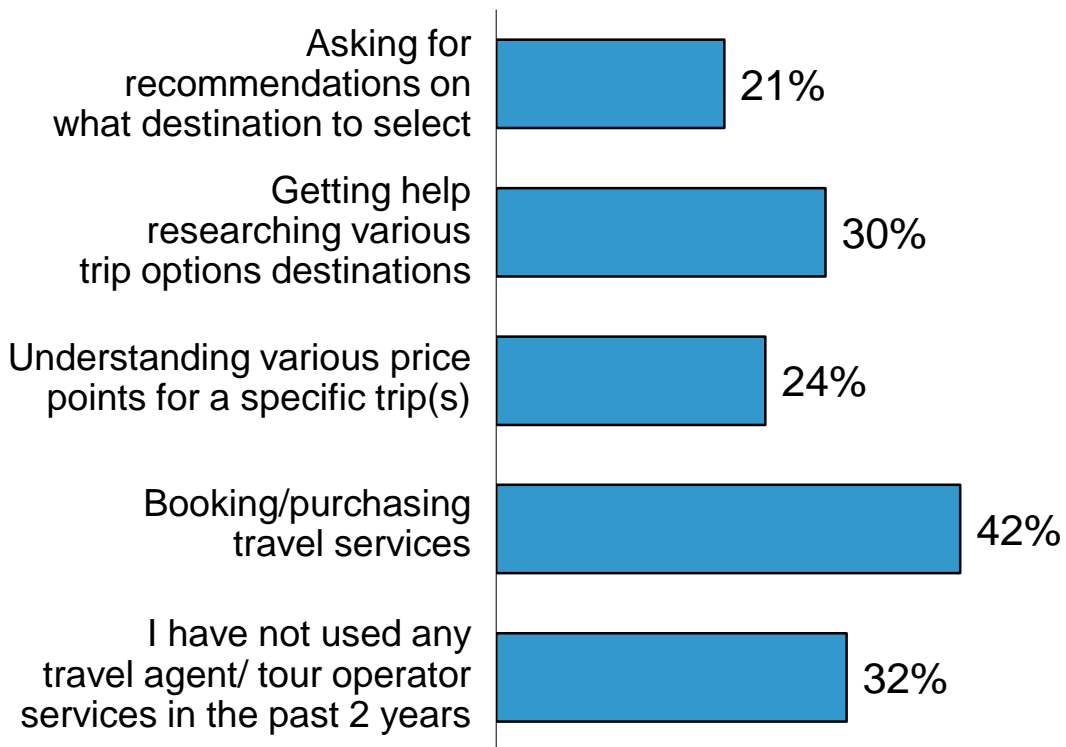
Base: Total UK Travellers (n=1,101)

QTT1. Which one of the following statements best describes your state of mind concerning choice of destination when you visit a travel agent or tour operator?

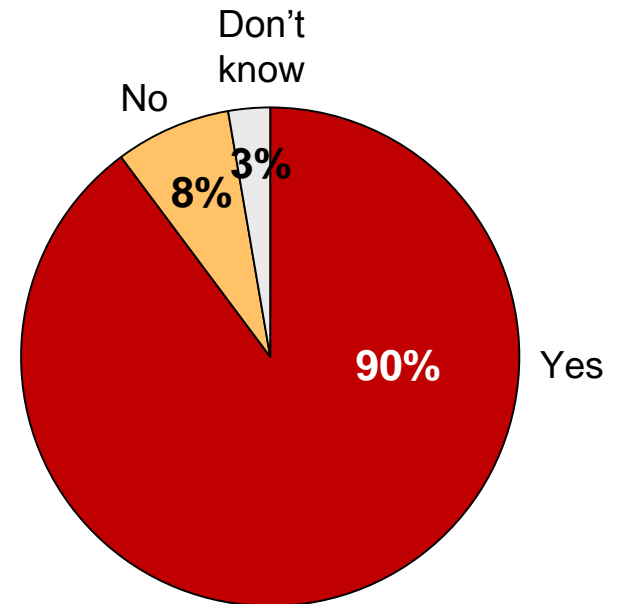
QTT2. If you were about to take a trip to Canada, which of the following statements do you think would likely apply to you?

# Experience With Travel Agents And Tour Operators (Cont'd)

**Travel Agent Services Used Past 2 Years**



**Research Trip Before Contacting Travel Agent**



Base: Total UK Travellers (n=1,101)

QTT3. What travel agent services, if any, have you used in the past two years?

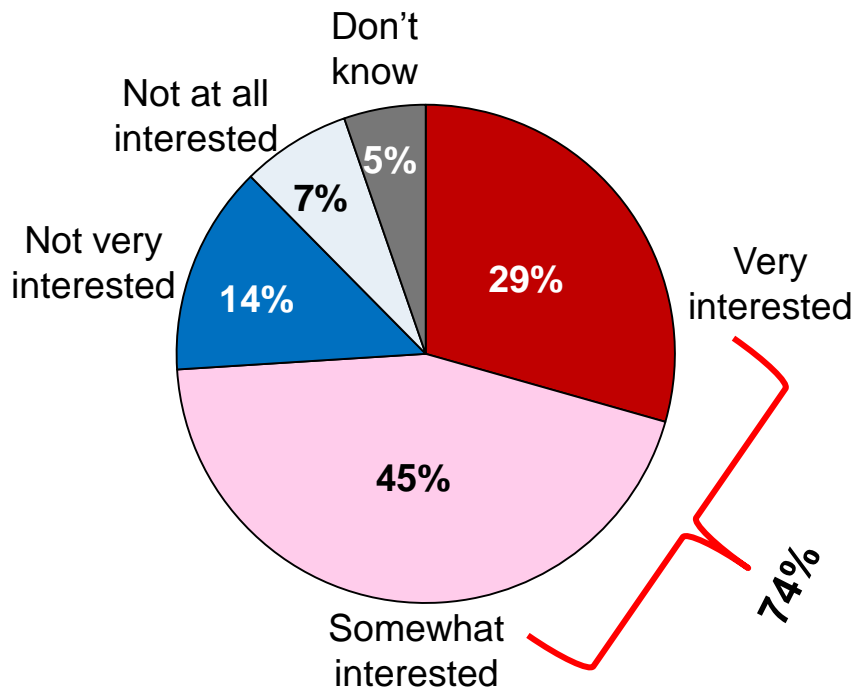
QTT4. Do you usually research any part(s) of the trip on your own before contacting a travel agent? This might include looking up information about the destination(s), transportation, accommodation, local tour options, and more.

# Motivating Creative Constructs

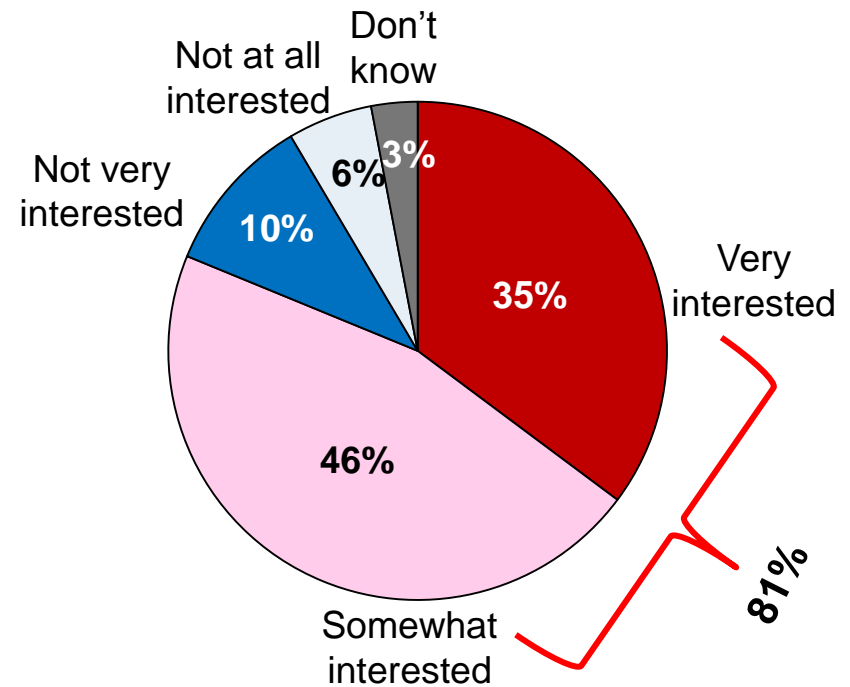


# Interest In Visiting Atlantic Canada In Future

## Before Exposure To Stimulus



## After Exposure To Stimulus



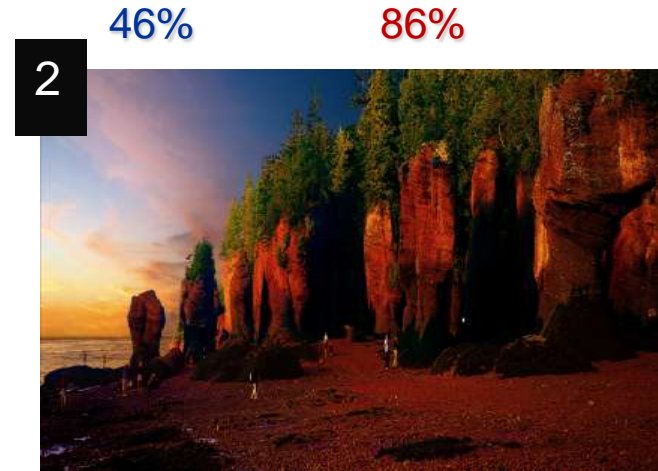
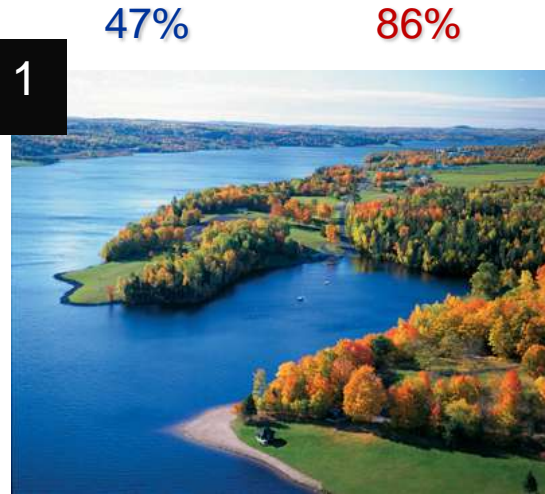
Base: Total UK Travellers (n=1,101)

Q11. How interested are you in visiting Atlantic Canada in the future, even if it is not in the next 2 years?

Q14. Now that you have learned more about Atlantic Canada, how interested are you in visiting it in the future, even if it is not in the next 2 years?

# Top 8 Appealing Images Out Of 20

Extremely / Very Appealing

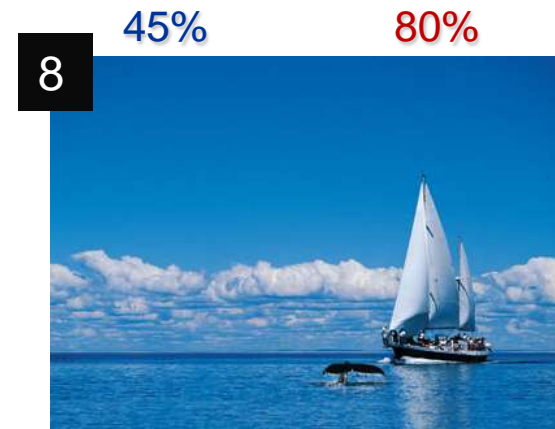


LEGEND: Extremely Appealing Net: Very / Extremely Appealing

Note: Ratings for other images tested are located in the Appendix

# Top 8 Appealing Images Out Of 20 (Cont'd)

Extremely / Very Appealing



LEGEND: Extremely Appealing Net: Very / Extremely Appealing

Note: Ratings for other images tested are located in the Appendix

# Scorecard – Mactaquac Autumn

## Mactaquac Autumn–New Brunswick



## Appeal

Extremely Appealing



47%

Net: Very/Extremely Appealing



86%

## Imagery (Top 2 Box)

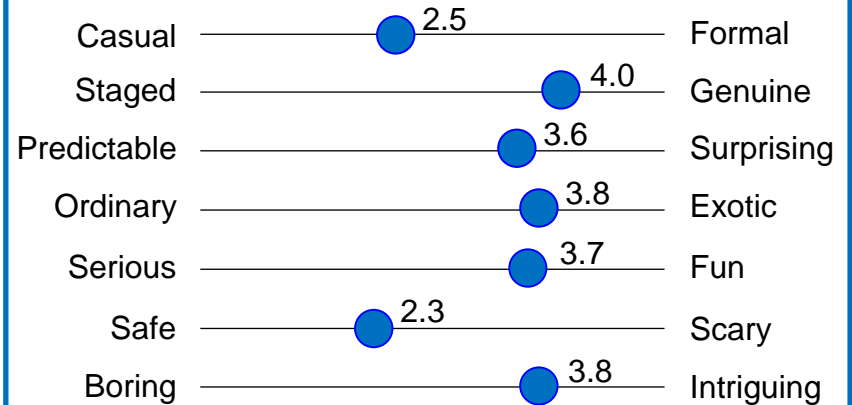
Scenery/Atmosphere is very appealing 84%

I could see myself participating in an experience like this 78%

The scene looks too extreme for me 11%

This scene is too desolate / isolated for me 11%

## Opposite Traits

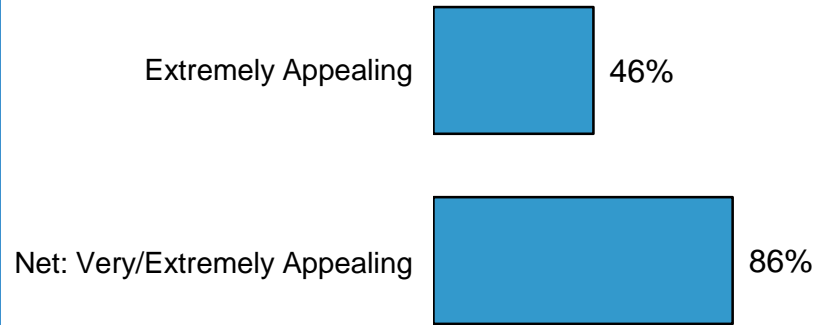


# Scorecard – Rocks Panoramic

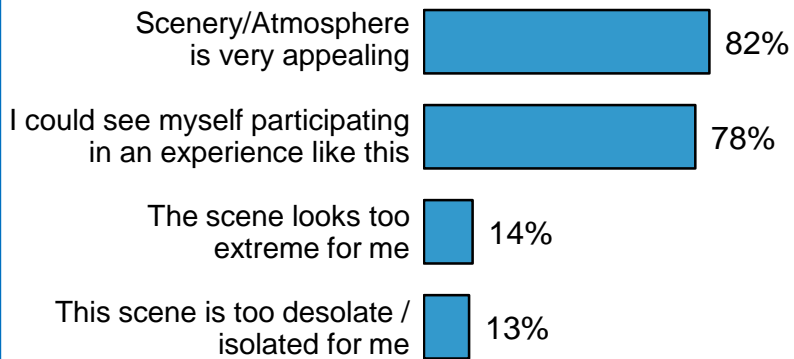
## Rocks Panoramic–New Brunswick



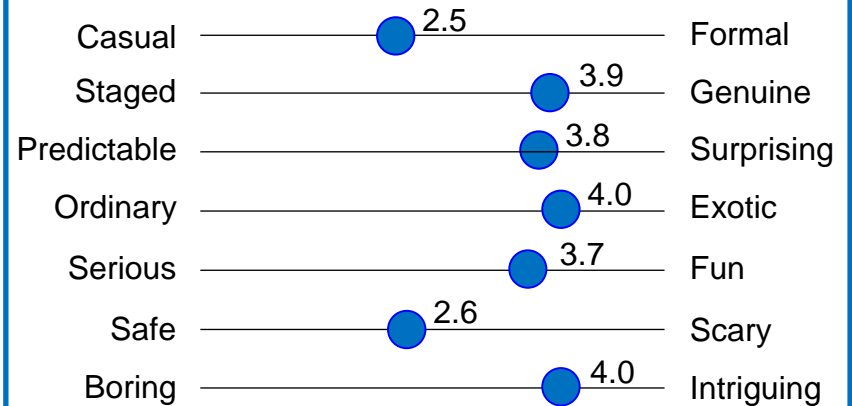
## Appeal



## Imagery (Top 2 Box)



## Opposite Traits



# Scorecard – Breaching Whale

## Breaching Whale–Newfoundland and Labrador



## Appeal

Extremely Appealing 46%

Net: Very/Extremely Appealing 86%

## Imagery (Top 2 Box)

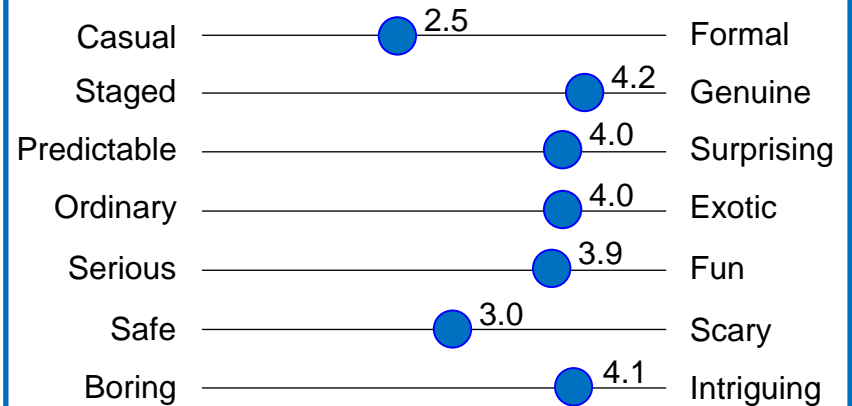
Scenery/Atmosphere is very appealing 83%

I could see myself participating in an experience like this 78%

The scene looks too extreme for me 13%

This scene is too desolate / isolated for me 11%

## Opposite Traits



# Scorecard – Brigus White House

## Brigus White House–Newfoundland and Labrador



## Appeal

Extremely Appealing



38%

Net: Very/Extremely Appealing



85%

## Imagery (Top 2 Box)

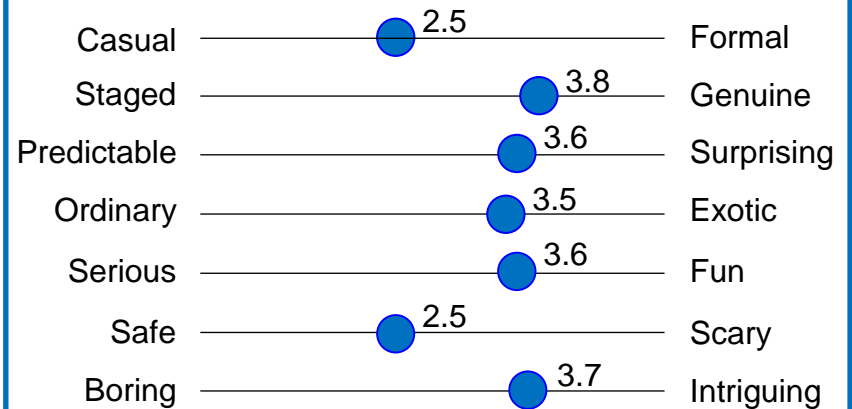
Scenery/Atmosphere is very appealing 83%

I could see myself participating in an experience like this 73%

The scene looks too extreme for me 11%

This scene is too desolate / isolated for me 14%

## Opposite Traits



# Scorecard – Whale Watching

## Whale Watching–Nova Scotia



## Appeal

Extremely Appealing



50%

Net: Very/Extremely Appealing



84%

## Imagery (Top 2 Box)

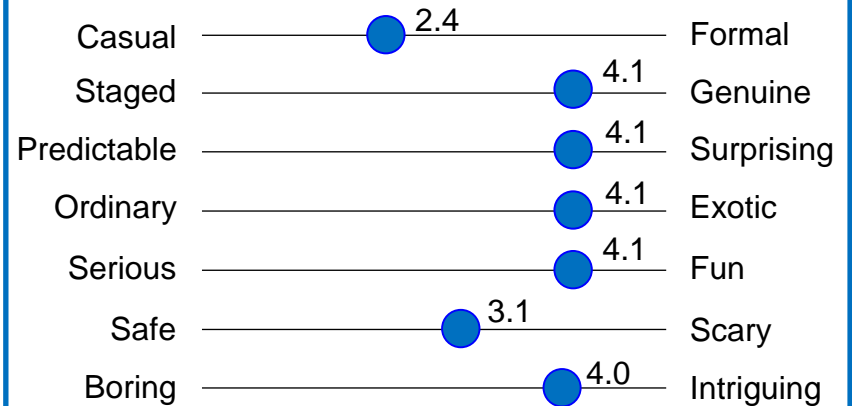
Scenery/Atmosphere is very appealing 79%

I could see myself participating in an experience like this 80%

The scene looks too extreme for me 17%

This scene is too desolate / isolated for me 11%

## Opposite Traits

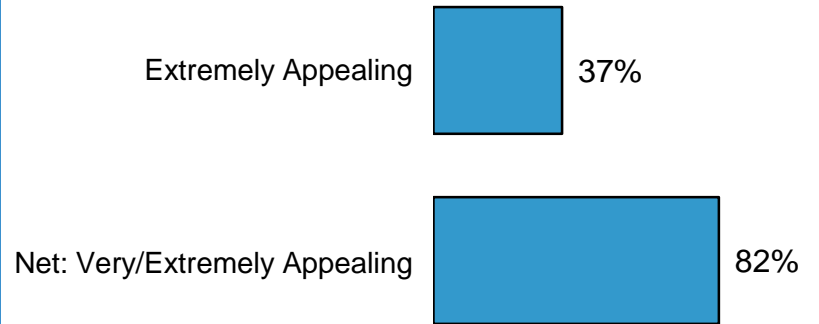


# Scorecard – Lunenburg Harbour Fall

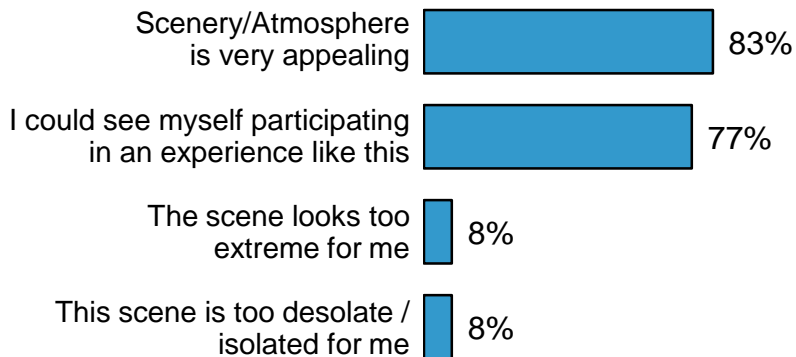
## Lunenburg Harbour Fall–Nova Scotia



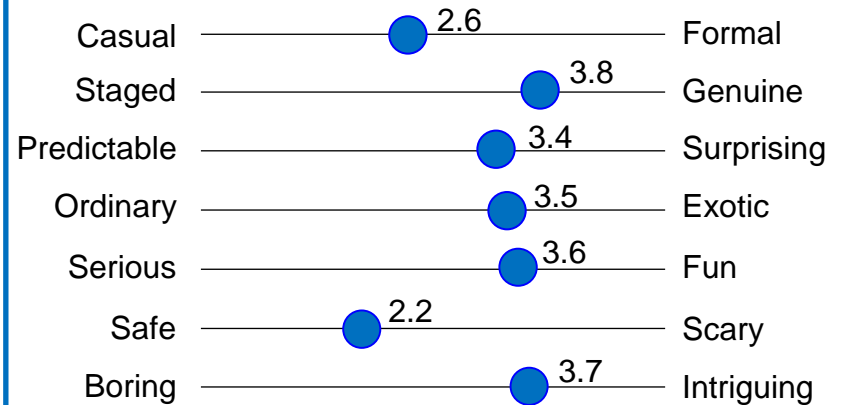
## Appeal



## Imagery (Top 2 Box)



## Opposite Traits



# Scorecard – Skyline Trail

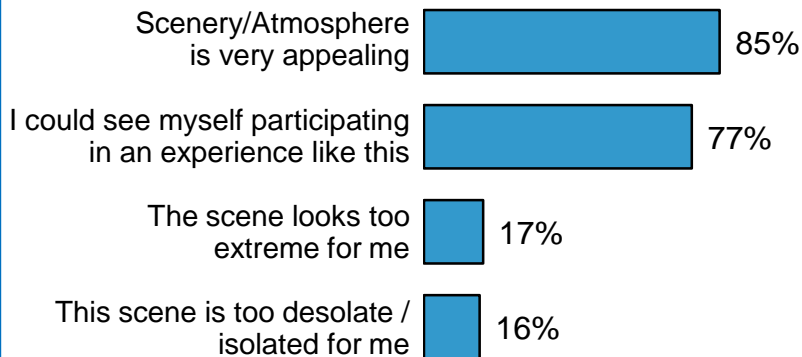
## Skyline Trail–Nova Scotia



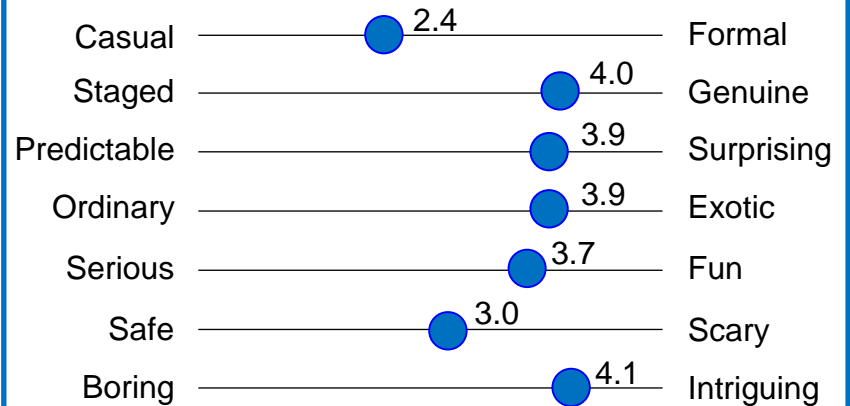
## Appeal



## Imagery (Top 2 Box)



## Opposite Traits



# Scorecard – Grand Manan

## Grand Manan–New Brunswick



## Appeal

Extremely Appealing



45%

Net: Very/Extremely Appealing



80%

## Imagery (Top 2 Box)

Scenery/Atmosphere  
is very appealing



82%

I could see myself participating  
in an experience like this



73%

The scene looks too  
extreme for me



10%

This scene is too desolate /  
isolated for me



11%

## Opposite Traits

Casual

2.4

Formal

Staged

3.9

Genuine

Predictable

4.0

Surprising

Ordinary

4.0

Exotic

Serious

3.9

Fun

Safe

2.9

Scary

Boring

3.9

Intriguing

# Highlighter Results

## Heat Maps Of Current Creative



# How To Interpret Highlighter Results

- In order to provide in-depth analysis of potential executions, a Highlighter exercise was employed.
- Highlighter is a visual tool that allows respondents to express their attitudes toward elements of a stimulus by colour-coding them.
- This provides an analytical framework to evaluate words, phrases, or images that contribute to positive or negative perceptions.

# ACTP Consumer Ad

- = Strongly like (Net 20% +)
- = Like (Net 10% - 20%)
- = Neutral (Net under 10%)
- = Dislike (Net negative)

**Quote:** "The welcome is warm and the coastline, spectacular."

**Net Sentiment Data:**

Element	Net Score
Main Image (Camera View)	+41 / -15
Quote Box	+26 / -3
QR Code	+2 / -8
Scenic Image 1 (Sunset)	+47 / -5
Scenic Image 2 (Beach)	+46 / -8
Scenic Image 3 (Barn)	+43 / -7
Scenic Image 4 (Whale)	+59 / -4
Canada Logo	+4 / -2
Holiday Package Text	+7 / -3
Atlantic Canada Logo	+9 / -3

**Holiday Package Text:** TWO-WEEK SEACOAST HOLIDAY PACKAGES start at just £969\*  
\*Price based per person, double occupancy and includes car rental, accommodations & activity

**Atlantic Canada Logo:** AtlanticCanadaHoliday.co.uk/FT

# CTC Consumer Ad

- = Strongly like (Net 20% +)
- = Like (Net 10% - 20%)
- = Neutral (Net under 10%)
- = Dislike (Net negative)

The image shows a social media video advertisement for Atlantic Canada. The video content features a whale tail breaching the ocean. The ad includes a video player interface, a comment section with two user comments, a promotional offer for 'Atlantic Canada Two-Week Seacoast Packages' starting at £969, a QR code, and a call to action to visit the website. Sentiment analysis callouts are placed over various elements, indicating positive and negative feedback scores.

Element	Score
Video Player (Overall)	+69 / +9
Video Title: 'Everyone waves for the camera.'	+9 / -2
Video Player (Progress Bar)	+4 / -1
Comment by Peterk45	+6 / -16
Comment by Hanna	+6 / -15
Promotional Offer: 'Atlantic Canada Two-Week Seacoast Packages'	+27 / -11
QR Code	+5 / -9
Call to Action: 'Explore more of Canada. Visit www.canada.travel/Atlantic to start planning your trip.'	+6 / -2
Canada Logo	+16 / -1

# Joint Marketing Ad - Travel trade

- = Strongly like  
(Net 20% +)
- = Like  
(Net 10% - 20%)
- = Neutral  
(Net under 10%)
- = Dislike  
(Net negative)



# Demographic Profile Of Those Drawn To Atlantic Canada



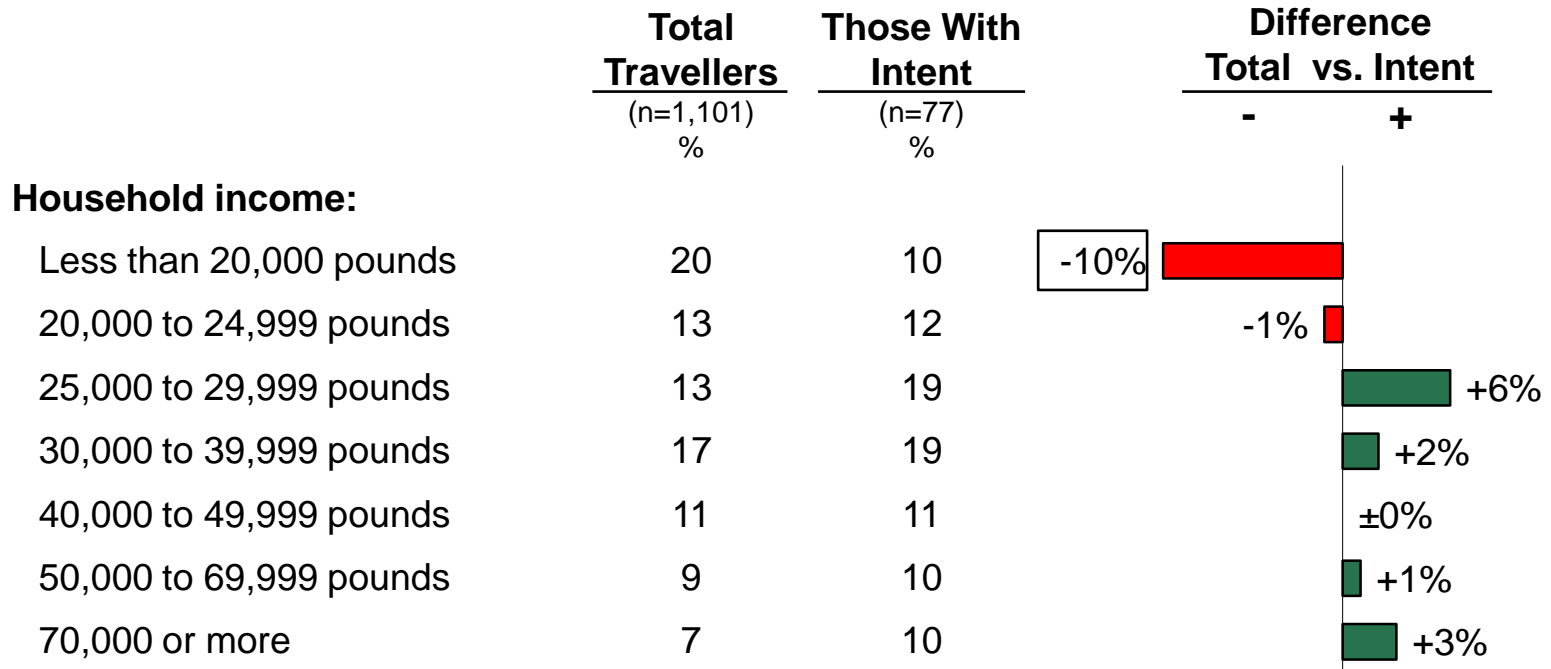
# Demographic Profile

## Household size / Marital status / Employment status

	Total Travellers	Those With Intent	Difference Total vs. Intent	
	(n=1,101)	(n=77)	-	+
<b>Household Size:</b>				
	#	#		
Average household size	2.6	2.8		+0.2
Average number of children in household	0.4	0.6		+0.2
<hr/>				
<b>Marital Status:</b>				
	%	%		
Married/living with someone	71	69	-2%	
Single (never married) living on your own	10	16		+6%
Single (never married) living with parents/other family	5	6		+1%
Separated / divorced	9	5	-4%	
Widowed	4	4		±0%
<hr/>				
<b>Employment Status:</b>				
Working full-time (30+ hours per week)	42	49		+7%
Working part-time (8 to 29 hours per week)	13	14		+1%
Self employed	6	4	-2%	
Stay-at-home parent not employed outside the home	4	3	-1%	
Retired	26	25	-1%	
Other	9	5	-4%	

# Demographic Profile

## Household income



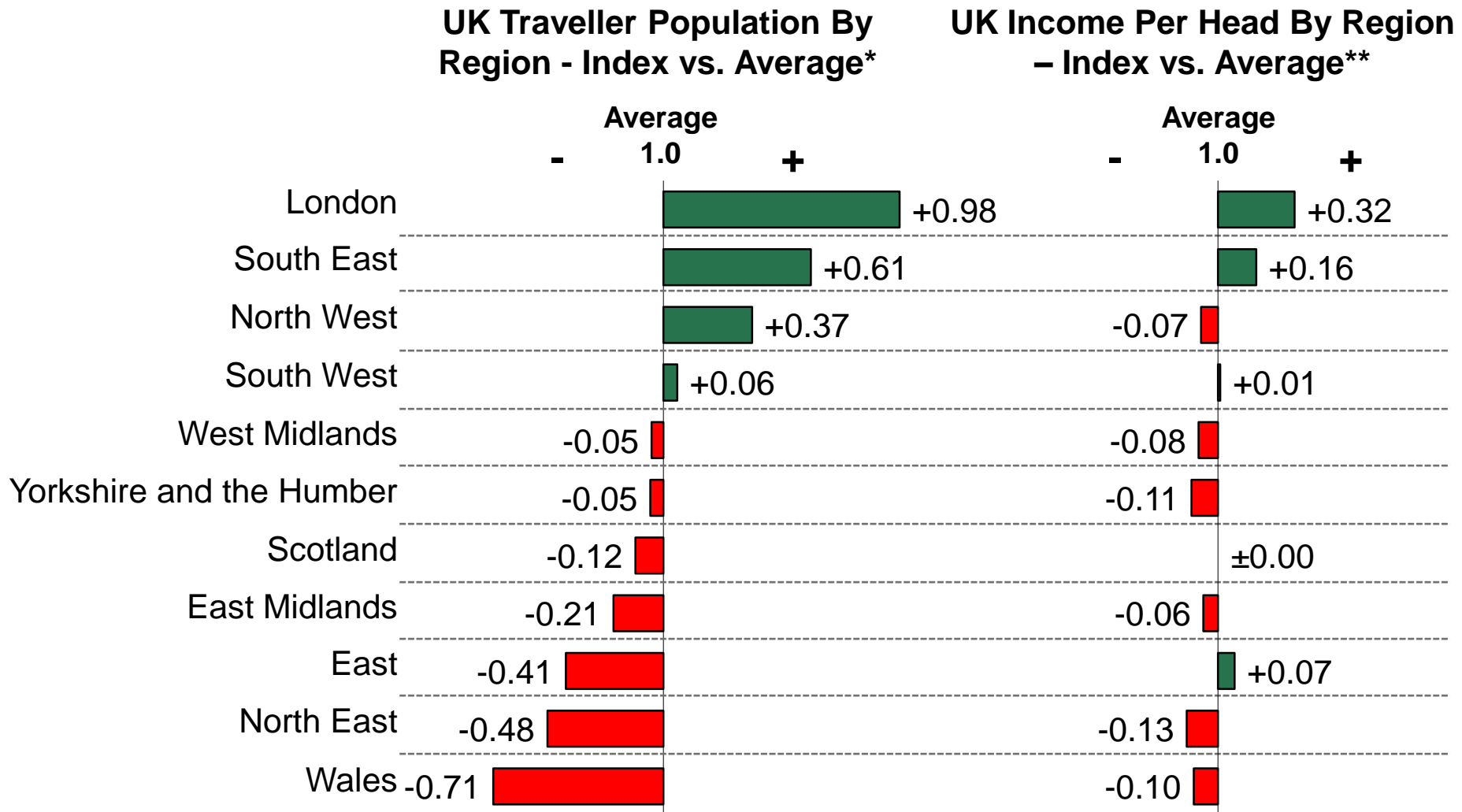
Statistically significant difference at 95%

# Demographic Profile

## Education / Region

	<u>Total Travellers</u>	<u>Those With Intent</u>	<u>Difference Total vs. Intent</u>	
	(n=1,101) %	(n=77) %	-	+
<b>Level Of Education:</b>				
Secondary school	38	37	-1%	
Post-secondary, not university	21	16	-4%	
University / college	37	45		+8%
<hr/>				
<b>Region:</b>				
North East	4	3	-1%	
Yorkshire / Humberside	9	11		+3%
East Midlands	7	9		+2%
Eastern	9	12		+3%
South Eastern	14	10	-3%	
Greater London	9	15		+6%
South West	9	10		+1%
Wales	12	7	-5%	
West Midlands	5	3	-2%	
North West / Merseyside	13	8	-5%	
Scotland	9	11		+2%

# UK Traveller Population And Income By Region



\* Total UK Traveller population by region with average standardized to 1.0 based on UK census data

\*\* Average Income per head by region with average standardized to 1.0 based on UK census data

# Index Of Net Opportunity For Atlantic Canada\*

Interest in Atlantic Canada weighted by population size and income



\* Total UK Traveller population interested in Atlantic Canada (very or somewhat interested) multiplied by index of average income per head with average standardized to 1.0. Based on UK census data and survey data.

# Implications



# Implications

## Is it worth the effort?

- Yes.
- Canada is a strong contender within the consideration set of UK travellers.
- The volume potential is significant.
  - 2.6 million UK travellers would consider Atlantic Canada in future planning.
- Atlantic Canada is likely to attract the high-end UK traveller.
- The Atlantic region can act as a generator of renewed enthusiasm for Canada.
  - This suggests an argument to position Atlantic Canada more centrally in the CTC's UK marketing efforts.

# Implications (Cont'd)

## What are the barriers?

- There is a lack of basic awareness and full appreciation of Atlantic Canada.
- There is a need to build the brand's standing virtually from the ground up :
  - Awareness profile and appreciation of distinctiveness.
- There is also a need to overcome inertia associated with Canada generally.
- The competition is intense.
  - Those currently drawn to Atlantic Canada are attracted to a wide range of other destinations as well.

# Implications (Cont'd)

## How do we motivate UK travellers to choose Atlantic Canada?

- Marketing efforts will be aimed at the mainstream at this early stage rather than at niche opportunities.
  - Adventure travel and other narrowly appealing elements of the Atlantic Canada offering should not assume centre stage.
- Focus on their core needs and drivers.
  - They want new and different experiences.
- But generally want to engage in them at low risk
  - They don't want to stray too far from the familiar and want assurance of success.
- Escape, renewal and low stress are also widely appealing travel motivators.
- Diversity of experience is important.
  - UK travellers want a variety of appealing choices available to them.
  - This provides further assurance of enjoyment and reduces risk.

# Implications (Cont'd)

## What does this say about positioning and communication focal points to realize opportunity?

- There is an opportunity to combine assurance/familiarity with new/different/unique.
- Comfort, assurance and a sense of connection :
  - Reinforcement of Atlantic Canada's British heritage
  - Association with "Canada" as a known entity (friendly and welcoming).
- A sense of uniqueness of experience can be stimulated by:
  - Using images of the landscape and nature to establish drama.
  - These are focal points for reinforcing the message that Atlantic Canada is unique and interesting.
  - But "nature" must be balanced with a diversity linked to culture, history, towns/villages, the traditional fishing lifestyle, and the notion of quaintness.
  - The universal desire for shopping and entertainment experiences should be tied to the key differentiating elements.

# Implications (Cont'd)

- For Atlantic Canada, authenticity will be core to the offer.
  - Particularly true given the need to develop the essence of “place” literally from the ground up.
  - Differentiating experiences become meaningless if they come across as overly commercialized, standardized or stereotypical.

# Implications (Cont'd)

## What next?

- Recognize that you are in for the long-haul.
- Media strategies should focus on increasing awareness and brand understanding...
  - Follow-up tactics will drive traffic with special buyable packages.
- Creative should utilize dramatic but relatable visuals.
- Ensure that online media has a central place in the communications effort alongside more traditional vehicles such as print.
- It is recommended to buy into CTC print campaigns with links to CTC digital packages that offer opportunities to broadcast video content of the region.
  - Promote the argument that Atlantic Canada can be leveraged by the CTC to support Canada generally.
- Use search optimization to target the higher end of the UK traveller spectrum.
  - SEO and SEM should be targeted to drive core consumer to the offerings and packages.

# Implications (Cont'd)

- Assume that the consideration set is fixed before a travel agent or tour operator is brought into the picture.
- Travel agents should be equipped not to introduce potential visitors to Atlantic Canada, but to “close the deal” ...
  - by imparting an understanding of specific differentiators versus competitive destinations in Canada and the US...
  - by educating on the specifics of the offer...
  - by educating on regional nuance within Atlantic Canada ...
  - and by equipping them with the knowledge and tools to package and customize the Atlantic Canada experience to the specific needs of each traveller.
- Efforts might focus initially on London and the South East.
  - Where prospects are best for reaching large numbers of travellers with congruent profile characteristics and interests.

# UK Consumer Research

Presented: September 20, 2011

Survey Conducted: March, 2011

