

United States Consumer Research



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Context: Summary Report

Author: TNS Canadian Facts

Research Objectives & Methodology

Research Objectives

The following summary highlights the key findings from a research study undertaken for the Atlantic Canada Tourism Partnership (ACTP) in 2009 by TNS Canadian Facts. ACTP wanted to learn more about characteristics of pleasure travellers residing in the Mid Atlantic states (New York, Pennsylvania, and New Jersey) and the Pacific states (California, Oregon, and Washington) with a view to attracting more visitors to the four provinces comprising Atlantic Canada (Nova Scotia, Newfoundland, New Brunswick, and Prince Edward Island). Both markets are considered developmental, so the focus of this research was on market profiling and benchmarking.

The study was undertaken in two parts:

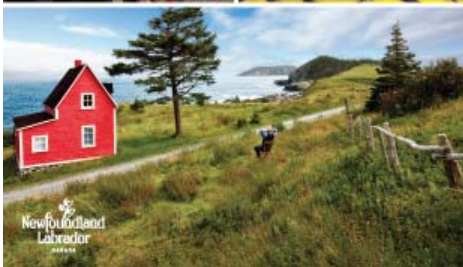
Part 1: analysis of existing data on known out-of-state travellers

(3+ nights) residing in the Mid Atlantic and Pacific states from a TNS US syndicated study, *Travels America*; and,

Part 2: a custom online study among known out-of-state Travels America travellers (3+ nights) residing in these regions. A total of 1,240 respondents (620 per region) participated in the online study between October 22-29, 2009. Data were weighted to their correct demographic proportions within the sampled markets.

The objectives of Part 2 included measuring:

- Past travel behaviour and future travel intentions;
- Awareness of, interest in, and likelihood of visiting each of the Atlantic Canada provinces;
- Factors influencing destination choice;
- Popular activities on pleasure trips;
- Advertising recall; and,
- Appeal of destination imagery.



Key Findings

Vacation Behaviour

- Travel within the US predominates in both regions with approximately 90% of all respondents travelling out-of-state having visited a US destination in the past 2 years. Travel tends to be intra-regional and to nearby sun states. Mid Atlantic travellers favour Florida, New Jersey, and Pennsylvania while those in Pacific states opt for Nevada, California, and Oregon.
- Canada is the 4th most visited destination overall. Again, travel patterns tend to be intra-regional with Mid Atlantic residents most likely to have visited Ontario and those living in the Pacific having a tendency to visit BC. Atlantic Canada attracts currently attracts only a small portion of visitors from either market – 3% of Mid Atlantic travellers report a visit to Atlantic Canada in the past 2 years while just 1% of those living in the Pacific region visited during this timeframe.

Top Destinations – Past 2 Years

Mid Atlantic states (n=620)	Pacific states (n=620)
United States 88%	United States 91%
Europe 15%	Europe 15%
Caribbean / Bermuda 21%	Mexico 15%
Canada 13%	Canada 14%
Mexico 9%	Asia 8%

How Vacation Destinations are Chosen

- When planning out-of-state trips, travellers in both regions seek destinations that offer relaxation, beautiful scenery, and are welcoming and friendly. Value for money offered by the destination is also important.
- Weather is also a major consideration for Mid Atlantic travellers while this factor appears less of an issue for those in the Pacific states.

Top Factors Impacting Destination Selection – Past 2 Years

Mid Atlantic states (n=620)	Pacific states (n=620)
Relaxing place 66%	Relaxing place 57%
Welcoming and friendly 58%	Beautiful scenery 56%
Beautiful scenery 56%	Welcoming and friendly 49%
Great weather 54%	Good value for money 47%
Good value for money 47%	Good restaurants 42%

- Travellers in both regions appreciate experiential opportunities, escape, and the freedom that travel offers.

Top Benefits Sought From Travel – Past 2 Years

Mid Atlantic states (n=620)	Pacific states (n=620)
Chance to see and do new things 91%	Chance to see and do new things 91%
Escape ordinary routine 90%	Escape ordinary routine 89%
Do what I want, when I want 87%	Do what I want, when I want 87%
Relax and get rid of stress 86%	Relax and get rid of stress 87%
Create lasting family memories 83%	Renew mind, body, and soul 83%

Popular Vacation Activities

- The top activities pursued on vacation trips are consistent across regions, with shopping and dining being most popular.
- Mid Atlantic travellers rank the importance of beaches and swimming ahead of cultural attributes in destination selection. Their vacation activity pursuits are closely aligned with Atlantic Canada's offering.
- Travellers living in Pacific states seek different experiences on vacation, with cultural experiences outranking beach activities. Still, there are opportunities for Atlantic Canada to emphasize unique cultural experiences to this market.

Most Popular Vacation Activities On Out-of-State Trips – Past 2 Years

Mid Atlantic states (n=620)	Pacific states (n=620)
Shopping 62%	Dining 61%
Dining 62%	Shopping 59%
Beach / sunbathing 45%	Strolling around a city to see buildings and architecture 40%
Swimming 41%	Historic sites 38%
Strolling around a city to see buildings and architecture 38%	Museums 34%
Historic sites 38%	Swimming 33%
Visited national or state parks 30%	Visited national or state parks 33%
Museums 29%	Casino gambling 31%
Casino gambling 27%	Beach / sunbathing 30%
Zoos / aquariums 27%	Photography 26%

Awareness and Interest in Atlantic Canada Destinations

- Respondents in both regions were asked about awareness of individual Atlantic Canadian provinces. In general, those in the Mid Atlantic states have higher awareness of Atlantic Canadian provinces than those in the Pacific region which is not surprising given geographic proximity.
- In both regions, awareness of Nova Scotia substantially exceeds that of all other provinces.
- Those aware of specific provinces were asked about the likelihood of visiting those destinations on a pleasure trip in the upcoming 2 years. Stated intent to visit is low, with Nova Scotia emerging as the top draw for Mid Atlantic residents and Prince Edward Island of greatest interest to those in the Pacific region.

Atlantic Canada Awareness and Interest

	Mid Atlantic		Pacific	
	Aware	Definitely / Probably Consider – next 2 years	Aware	Definitely / Probably Consider – next 2 years
Nova Scotia	83%	20%	81%	16%
PEI	68%	13%	66%	20%
Newfoundland	68%	11%	61%	13%
New Brunswick	63%	12%	56%	12%

Atlantic Canada Versus New England States

- There are well established travel patterns to New England, especially in the Mid Atlantic market. Atlantic Canada's challenge is to tap into analogous interests while also identifying points of differentiation and capitalizing on them to draw visitors.
- Respondents were asked to rate Atlantic Canada provinces and the New England region on various attributes and characteristics. Note assessments were based on past experiences and general impressions.
- Atlantic Canada has several perceived advantages over New England states. The opportunity appears to lie in promoting the uniqueness (physical and culture) and relaxation / safety aspects of Atlantic Canada.

Atlantic Canada / New England Comparison

Atlantic Canada Advantages	New England Advantages
Culture	Beaches
Natural Wonders	Seafood
Authentic Maritime Experiences	Accessibility & Shorter Driving Distance
Friendly People	Urban Experiences
Safe	Easy to vacation
Rejuvenating Experiences	

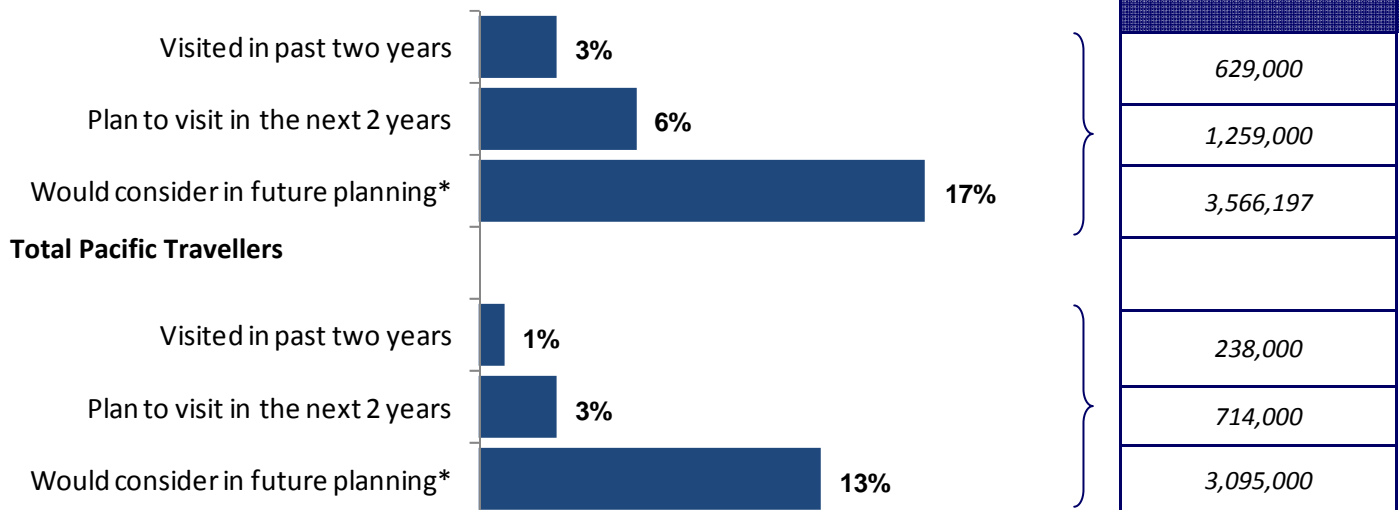
Potential Market for Atlantic Canada

- The US remains the #1 destination for future out-of-state trips. Future travel intentions appear to mimic past behaviour with a stated preference for sun destinations within the US (Florida and California). Canada emerges as the #2 destination for a pleasure trip within the next 2 years in both the Mid Atlantic and Pacific regions.
- Using past visitation figures and future inten-

tion to visit, it is possible to estimate the potential market for Atlantic Canada in the Mid Atlantic and Pacific regions. Combined, this market is approximately 6.6 million when those considering a trip to Atlantic Canada are included in the calculation.

The target market is middle-aged couples (47 years on average), moderate to high income, and well educated.

Total Mid Atlantic Travellers



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

** From US Census figures and TAMS '06

Advertising Recall and Imagery Assessment

- Few respondents recalled seeing advertising for any Atlantic Canadian destination.
- Respondents were asked to assess photos and sample advertisements for Atlantic Canada destinations to guide future advertising efforts.
- The most appealing images tended to instill a feeling of serenity often in the context of a natural outdoor activity theme. Such images

were typically more powerful when tied to a sense of drama or uniqueness. Evidence suggests that enjoyment needs to be overtly underscored with virtually no ambiguity presented in this respect.

- Potential visitors preferred advertisements with limited copy and imagery emphasizing the themes noted above, particularly when linked to the notion of authenticity.

Conclusions and Implications

The potential market in the Mid Atlantic and Pacific states is substantial (estimated at 6.6 million), yet Atlantic Canada faces considerable challenges to capitalize on this opportunity.

The following section identifies next steps for building Atlantic Canada's market-share in these two regions.

- **Build awareness of Atlantic Canada as a whole as well as on the provincial level. Focus on distinctiveness / differentiation from New England destinations.**
 - **Stress that Atlantic Canada is not New England and the region offers something different than other parts of Canada**
 - **Stress authenticity**
 - **Leverage the region's reputation for being friendly and welcoming**
- **Capitalize on alignment between Atlantic Canada's offering and the benefits these travellers are seeking from vacations, namely:**
 - **Escape and freedom**
 - **Stress relief and spiritual renewal**
 - **New and different experiences**
 - **A safe environment**
- **Key Activities to highlight:**
 - **Outdoor activities that illustrate serenity and relaxed enjoyment**
 - **The area's unique culture, history, and museums**
 - **Don't forget the universal appeal of shopping and dining (not as central themes, but as hygienic 'cost of entry' factors providing secondary support)**
- **Imagery and messaging:**
 - **Use images that support physical and cultural distinctiveness**
 - **Copy should be brief and to the point**
- **The Mid Atlantic states likely represent a better short-term opportunity due to closer proximity and greater familiarity with the region.**
- **Focus on the market displaying the greatest interest (middle-aged, middle to high income, well educated).**