

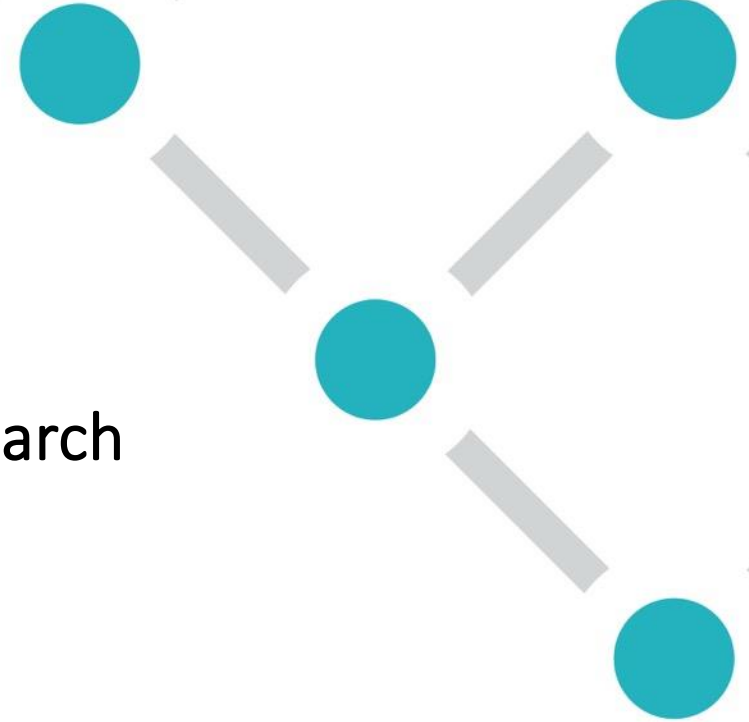


NARRATIVE
RESEARCH

2023 US Consumer Research Final Report

September 2023

Prepared for:





Background & Purpose



Background & Research Objectives

Tourism is a key driver and vital component of economic growth for the Atlantic Canadian region. Like economies around the world, Atlantic Canada has been profoundly impacted by the COVID-19 pandemic. The tourism sector in particular has been heavily impacted, facing significant uncertainty and chaotic conditions, with abrupt and massive falling revenues being reported, especially during the first few years of the pandemic. Encouragingly however, the industry appears to be rebounding. That said, there remains some uncertainty in the industry amid ongoing turmoil within the financial sector, high inflation, and lingering impacts of the pandemic.

With the pandemic reaching the end of its third year, it is important to better understand the factors that currently impact the way that Americans travel. Further, it is imperative to gain insight on how these factors may continue to impact travel intentions and behaviours over the next few years, given the ongoing, ever-changing pandemic dynamic. With this in mind, Tourism Industry Association of Prince Edward Island (TIAPEI), through the Atlantic Canada Agreement on Tourism (ACAT), commissioned Narrative Research to undertake quantitative research with Americans living in the Mid-Atlantic and New England regions to better understand this market's current mindset as it relates to travel intentions, choices and behaviours, and to assess visitor market potential from each of these two regions. Moreover, this study aimed to understand what factors may influence destination choice going forward. More specific research objectives included:

- Determine the incidence of out-of-state travel and future travel intentions;
- Examine where such visitors may have recently travelled to (e.g., where they travelled in 2022) and why;
- Explore travellers' mindset for upcoming travel (i.e., upcoming travel plans / travel destinations currently under consideration) and factors influencing travellers' choice of destination;
- Examine what information sources travellers use in aiding their choice of destination and in their vacation planning;
- Examine how travellers purchase travel and whether they use travel agents (and if so, what role they play);
- Explore what inspires or motivates this market to travel, including motivators for visiting Atlantic Canada;
- For those unlikely to visit Atlantic Canada, examine perceived obstacles, deterrents, or reasons against visiting;
- Assess the experiences and activities that motivate travel;
- Determine when travellers are most likely to take a vacation;
- Assess unaided and aided recall of advertising for the four individual Atlantic Canadian provinces;
- Assess awareness of, interest in and the likelihood of visiting each of the four Atlantic provinces, and determine reasons for their decisions; and
- Explore destination appeal and imagery that may inspire travel to the four Atlantic provinces.



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



Overview

To meet study objectives, an online survey was conducted with members of a general population online panel. A total of 2,402 travellers from the Mid-Atlantic (New York, New Jersey and Pennsylvania) and New England (Maine, Massachusetts, New Hampshire, Connecticut, Vermont and Rhode Island) regions took part in the study. 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.

The survey was based on ACAT's 2018 US Consumer Survey design, with several revisions made in consultation with the ACAT research team. Due to changes in the target audience's profile, comparisons to previous years are not provided.

The following presents a summary of results. A detailed set of data tables is provided which includes results broken down for each question by region (i.e., Mid-Atlantic and New England) and key demographics. Note: given that the online survey is a non-probability sample, a margin of error is not applied to results.



Study Highlights

Travel Activities

Ontario and Quebec are the Canadian provinces most visited by US travellers. There is familiarity of the Atlantic provinces, with nature, the ocean front and sightseeing being top expectations.

- Not surprisingly, domestic travel is most common among US travellers. However, one-quarter of US travellers have visited Canada in the recent past. Among specific travel destinations within the United States and Canada, Florida is top mentioned both among Mid-Atlantic and New England residents, with New York also cited as a key destination choice for those living in New England. Within Canada, the provinces of Ontario and Quebec are the most visited destinations — both among Mid-Atlantic and New England travellers. That said, a notable minority have visited Atlantic Canada in the past.
- In terms of awareness among non-visitors, Nova Scotia is the most heard of province within Atlantic Canada, with more than six in ten being at least aware of Nova Scotia, despite having never been there. At the same time, when it comes to familiarity, of the provinces visited or heard of, US Travellers are most familiar with what there is to see and do in Quebec and Ontario. Among the Atlantic provinces, familiarity is strongest for Nova Scotia, closely followed by Prince Edward Island, New Brunswick and Newfoundland and Labrador.
- When asked what they expect to see and do in the Atlantic provinces, US travellers cite nature, the ocean front and sightseeing in general as top answers. Indeed, a common theme among travellers is the ability to participate in outdoor activities and be around nature and the ocean. One quarter of travellers are not sure what there is to see and do in the provinces of Newfoundland and Labrador and New Brunswick, with numbers being slightly lower for the provinces of Nova Scotia and PEI. Altogether this underscores the importance of highlighting what each province has to offer in terms of experiences.

Factors Impacting Destination Choice

A variety of factors are rated as important with safety being most critical among them.

- All assessed factors are highly rated in terms of importance when choosing a location. When it comes to what is critically important, safety is most highly regarded. Following this is enjoyment, the ability to de-stress, having great things to see/do and value for money. Other mentions speak to the appeal of outdoor scenery, being in a friendly and welcoming environment, one that offers experiences (especially culinary and dining ones), and exploration/the atmosphere in general. While authentic experiences and culture are also areas of high importance among US travellers, the appeal of the outdoors and nature is highly rated. Access to nightlife and amusement parks are less important in location choice, although still an area of consideration, especially among younger travellers.



Study Highlights - *Continued*

Travel Intentions

June to September are peak travel times within Atlantic Canada. While air travel is most popular, visitors still turn to travel agents for support in planning their trip.

- Regarding travel intentions with booking, one-half of travellers have either already booked or plan to book a trip within the US in the next two years, with a similar percentage seriously considering doing so. When it comes to visiting Canada, most travellers are likely to consider the country as a destination, but there is less concrete activity in the planning of trips in the next two years.
- When looking at US or Canadian destinations likely to visit, Florida and New York are listed highly, while Ontario and Quebec are the top answers among Canadian provinces. Findings show that financial considerations and incentives are most likely to encourage visitation to the Atlantic region.
- Not surprisingly, the warmer summer months are most popular for travel to Atlantic Canada, with June to September considered peak travel months. US travellers plan their trips months in advance, spending on average 4.5 to 4.9 months to plan and research their trip. Bookings are typically made between 3.5 and 3.9 months in advance. In terms of *how* to book their trips, travel related websites and review sites (such as Expedia, Travelocity and Trip Advisor) are most commonly used when considering an Atlantic Canada vacation. While destination websites and advice from friends/word-of-mouth is moderately popular among travellers for information, younger travellers are more likely to rely on social media as an information source.
- Overall, air travel is the most common mode of transportation to Atlantic Canada for vacation, with only one-quarter of travellers indicating they would travel by car. That said, preference for car travel is more common among older travellers. Regardless of which Atlantic province they intend to visit, the majority of US travellers would use a travel agent or tour operator to assist with their planning, particularly to book air transportation, ask for recommendations and help book accommodations.
- While the bulk of US travellers anticipate the number of vacation trips they take this year to be the same or higher than the previous year, results suggest the number of trips they take to Canada will remain relatively stable.



Study Highlights - *Continued*

Ad Recall

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

- Perhaps unsurprising, US travellers are most likely to recall exposure to tourism advertising focused on their own domestic markets, with recall being strongest for Florida as a travel destination. When considering tourism advertising focused on the Atlantic Canada market, a significant minority have recently seen tourism advertising the region with recall for Nova Scotia generally on par with Ontario.
- Those living in the Mid-Atlantic are more likely than those living in New England to recall advertising for New Brunswick, Newfoundland & Labrador and Prince Edward Island.

Ad Evaluation

Atlantic Canada provincial ads performed well and were generally considered appealing and motivating.

- Overall, between 69% and 77% of US travellers found each series of ads to be *very* or *somewhat* appealing, while between 60% and 67% indicated the ads motivate them to travel to the respective province.
- For each province, more than six in ten US travellers overall agree the ads make them want to find out more about the respective province, with two-thirds agreeing that each of the ads include things of interest to them.
- Overall, ad exposure appears to positively impact likelihood to visit the Atlantic Canada region. Indeed, for each Atlantic Canada province, after seeing ads for the sights and activities, between 37% and 51% stated they *definitely* or *probably* will take a pleasure trip to that province in the next two years or so. Results are generally consistent across the Mid-Atlantic and New England.

An infographic summary of research results is presented on the following two pages.



ACAT – 2023 US Consumer Study

Key Highlights

Methodology: 2,402 online surveys with US travellers living in the Mid-Atlantic and New England States.
Data Collection: July 25 to August 1, 2023.



94%

Have taken an out of state vacation trip in past 3 years



With an average of 4–5 trips

Top 10 Factors *Critically* Important When Choosing a Pleasure Trip Destination

80% • Is a safe place to visit	58% • Has beautiful outdoor scenery and landscapes
65% • Is a place I can enjoy when I travel with friends/family	57% • Has people that are friendly and welcoming
64% • Is a place that allows me to de-stress	57% • Has great local dining and culinary experiences
63% • Is a place with a lot of great things to see and do	53% • Is a great place for exploring and soaking in the atmosphere
62% • Offers good value for money	49% • Is a place that offers a “real”/authentic experience

Intentions of Visiting Canada Over the Next 2 Years (Pre-Ad Exposure)

78%

Are open to taking a pleasure trip to Canada...

14%

Are currently gathering information/ planning their itinerary

While...

5%

Are currently making arrangements or have already booked their Canadian trip!

Top Destinations Travelled in Recent Years

74%	• Within the United States
27%	• Caribbean/Bermuda
24%	• Canada
22%	• Europe
14%	• Mexico

Key expectations of Atlantic Canada

NATURE
OCEAN FRONT
SIGHTSEEING



Of those, % Likely to Visit Atlantic Canada

NB: 11% NL: 8%
NS: 19% PEI: 14%

% Who Visited the Atlantic Region

NB: 13% NL: 7%
NS: 13% PEI: 9%

36%

would prefer Atlantic Canada over the Mid-Atlantic or New England region as a vacation destination

The Pleasure Trip Planning Cycle

Preferred Travel Months: June, July, August & September

Trip Planning: Plan/Research: 4–5 months; Book: 3–4 months

Portion of US Travellers Who EVER Visited Atlantic Canada

23%	16%	27%	20%
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Among *non-visitors* **47%–63%** have heard of each Atlantic Province

Top 5 Information Sources for Atlantic Canada

62%	Travel Websites (e.g., Expedia, Travelocity)
54%	Online Review Sites
38%	Destination Websites
36%	Social Media (e.g., Facebook, Instagram, TikTok, etc.)
33%	Advice of Friends/Family/Word-of-Mouth

Of those likely to consider visiting Atlantic Canada in the next 2 years, **55%–59%** would use a **travel agent/tour operator**



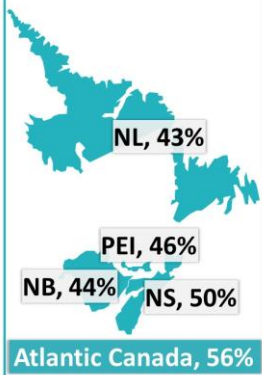
ACAT – 2023 US Consumer Study

Key Highlights: Ad Recall

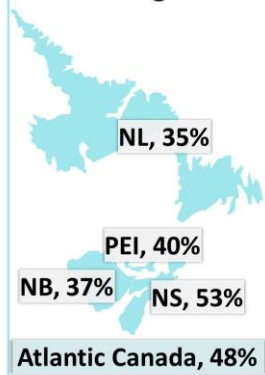
For each province, one digital banner ad and one 30-second video was presented.

General Recall of Tourism Related Ads By Destination

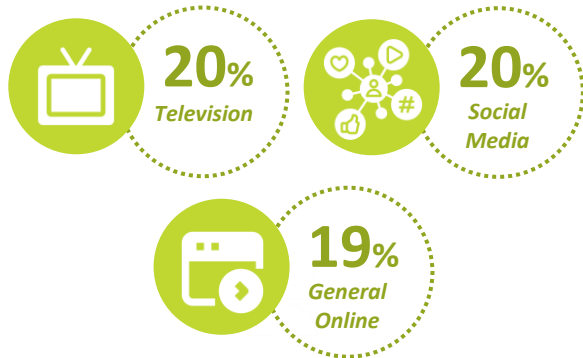
Mid-Atlantic



New England



Top Recalled Mediums for General Atlantic Canada Ads



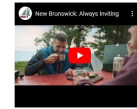
New Brunswick

The ads...

- Are Appealing: 69%
- Motivates Them to Travel: 60%



Likely to take a pleasure trip to NB after seeing ads



Agreement with Statements

- 75% • Make NB feel like a friendly/welcoming destination
- 63% • The ads 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

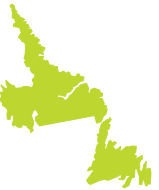
Newfoundland & Labrador

The ads...

- Are Appealing: 76%
- Motivates Them to Travel: 67%



Likely to take a pleasure trip to NL after seeing ads



Agreement with Statements

- 67% • The ads include things of interest to me
- 66% • Make me want to find out more about NL
- 64% • Make me want to visit NL
- 61% • Tell me you can do and see things in NL you that you can't elsewhere

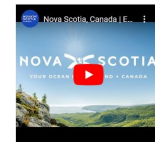
Nova Scotia

The ads...

- Are Appealing: 71%
- Motivates Them to Travel: 64%



Likely to take a pleasure trip to NS after seeing ads



Agreement with Statements

- 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% • The ads include things of interest to me
- 63% • Make me want to find out more about NS

Prince Edward Island

The ads...

- Are Appealing: 77%
- Motivates Them to Travel: 67%



Likely to take a pleasure trip to PEI after seeing ads



Agreement with Statements

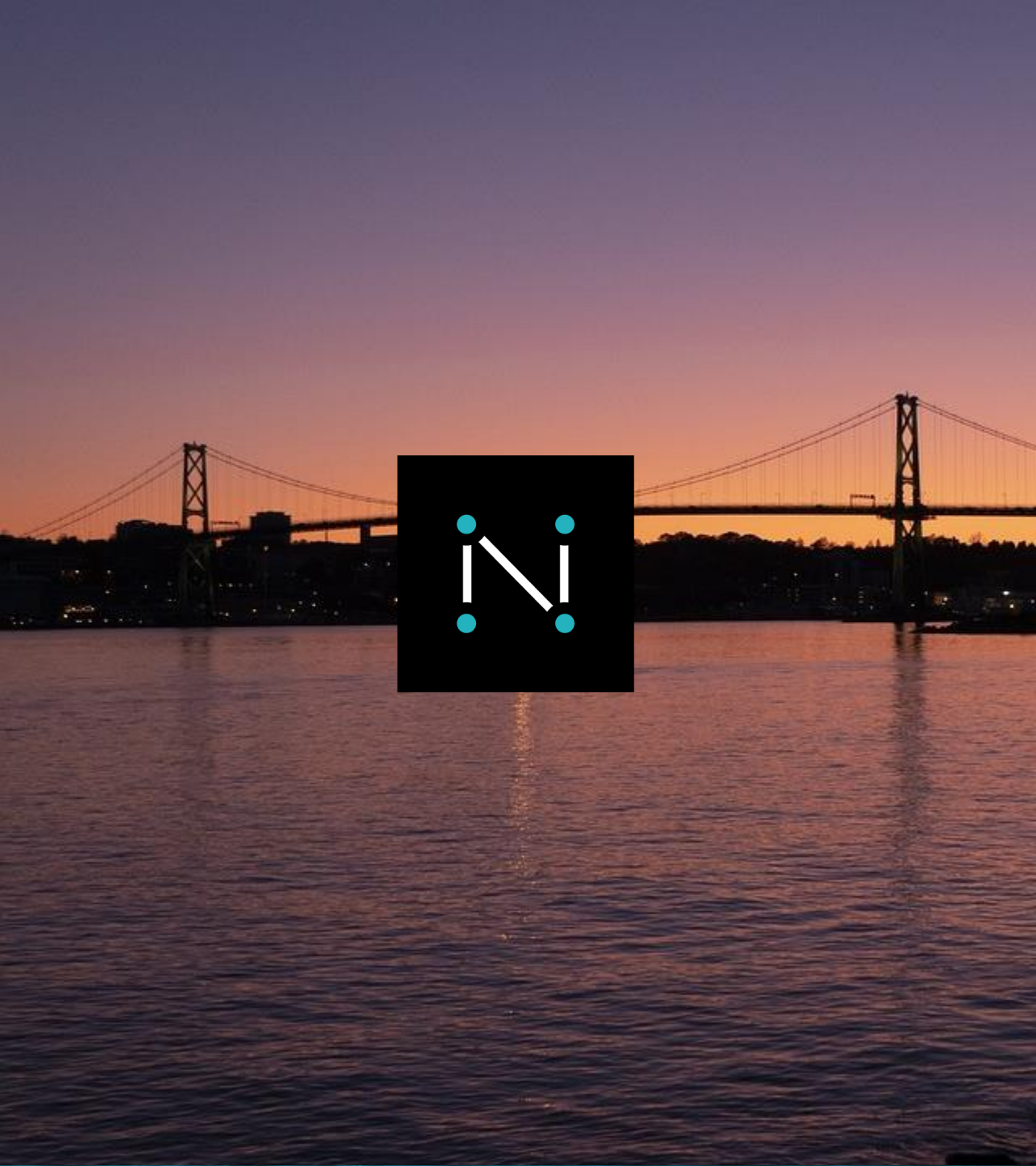
- 70% • The ads include things of interest to me
- 69% • Tell me whenever you visit, you'll feel lighter
- 67% • Make me want to find out more about PEI
- 66% • Tell me to come find your island



Looking Forward

Results suggest that US travellers are generally open to a wide variety of destination choices, and Atlantic Canada clearly holds appeal to many.

- In general, and consistent with previous study findings, **proximity between the New England region and Atlantic Canada appears to play a key role in destination choice**, with New England residents being notably more likely to have visited the Atlantic Canada region in the past and to express intentions to visit in the future.
- **Past experience in Atlantic Canada also clearly impacts behaviours.** Indeed, regardless of region, those who have visited Atlantic Canada in the past are notably more likely than non-visitors to express intention to revisit Atlantic Canada in the near future. As such, focusing marketing efforts on previous visitors, particularly those living in New England, will likely positively impact visitation.
- When it comes to destination choices, results show **Atlantic Canada faces tough competition when looking at the US market**, particularly US-domestic travel, and travel to Ontario and Quebec. Moreover, relatively limited awareness of and familiarity with the Atlantic Canada region and its offerings remains a key barrier when looking to attract US travellers. As such, to encourage US travellers to visit (or visit more often) for pleasure trips, further efforts are needed to build awareness of the region's unique and varied offerings, showing clear alignment between each Atlantic Province's offerings and the activities that hold greatest appeal to US travellers.
- **Future campaign efforts should focus on media buys in the early Winter and Spring months** as US travellers tend to spend multiple months planning and booking their pleasure trips. In addition, resources should focus on online mediums such as travel related websites, review sites, destination websites and social media, as they are all considered key information sources when considering an Atlantic Canada vacation.
- While it will be critical to **differentiate Atlantic Canada from other destination choices**, given the current state of the economy and the role cost plays in encouraging US travellers to select an Atlantic Canada pleasure trip over other destination choices, consideration should also be given on **highlighting the affordability of pleasure trips** to the Atlantic Canada region, including the impact of the Canadian dollar exchange. This may play a key role in **encouraging US travellers to select an Atlantic Canada pleasure trip over other destination choices.**
- Finally, **an air travel access solution is needed to meet the US travellers' needs.** Given the growing interest and prevalence of air travel as the preferred means of travel to Atlantic Canada, it will be important to focus efforts on finding an air travel access solution that effectively meets the changing needs of US travellers.



Travel Activities

The following section provides an overview of respondents' recent travel activities, specifically in relation to pleasure trips of 2 or more nights, where at least 1 night is spent in paid accommodations.



Recent Out of State Vacation

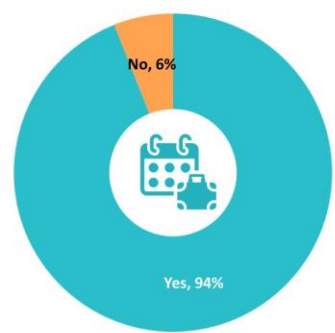
Nearly all US travellers surveyed have taken a recent out of state vacation. While the number of separate vacation trips recently taken varied across demographics, on average, travellers took four to five vacations over the last three years.

After being provided with a clear definition of a vacation trip (as noted below), US travellers were asked if they had taken a vacation trip in the past three years. As per screening criteria, all survey respondents indicated they held a valid passport, and had either taken at least one vacation trip outside their home state within the past three years or had definite plans to do so over the next year.

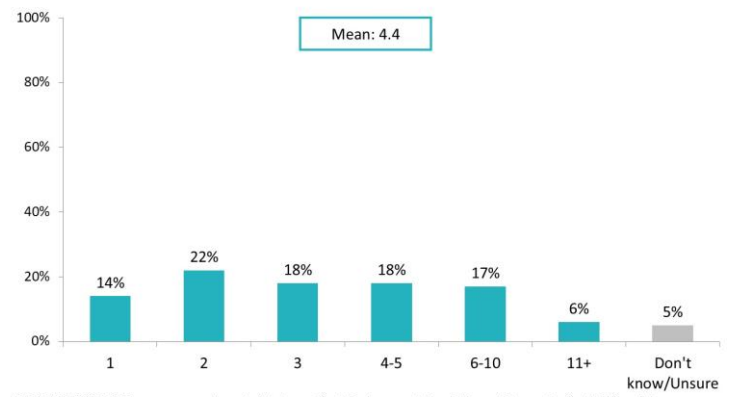
- Nearly all respondents surveyed (94%) **had taken a recent out of state vacation**. As previously noted, among the few who had not travelled (6%), all expressed definite plans to travel in the near future. (Tables 4 & 6)
- Among those who recently travelled, the number of vacations taken ranged from one trip (14%) to more than eleven (6%). On average, travellers took **four to five trips** during this time. Few (5%) were unable to recall the number of vacations they took over the last three years.
- Across demographics, US travellers with a higher household income are more likely to have had multiple recent vacation trips. (Table 5)

Taken a Recent Out of State Vacation

By vacation trip, we mean a pleasure trip of 2 or more nights, where at least 1 night is spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips. Please exclude any travel that was solely for business purposes, trips to your own cottage, and trips for personal reasons (e.g., to attend wedding/funerals, for medical reasons, etc.).

Number of Separate Recent Trips



Q.4: In the past 3 years, have you taken an out of state vacation trip on which you spent 2 or more nights away from home where at least 1 night was spent in paid accommodations? (n=2,402)

Q.5: [IF 'YES' IN Q.4] How many separate out of state vacation trips have you taken in the past 3 years (again, thinking of those pleasure trips of 2 or more nights, where at least 1 night was spent in paid accommodations)? (n=2,265) Note: Responses of 'Don't know/Unsure' have been removed from the calculation of the mean score.



Destination Country of Recent Travellers

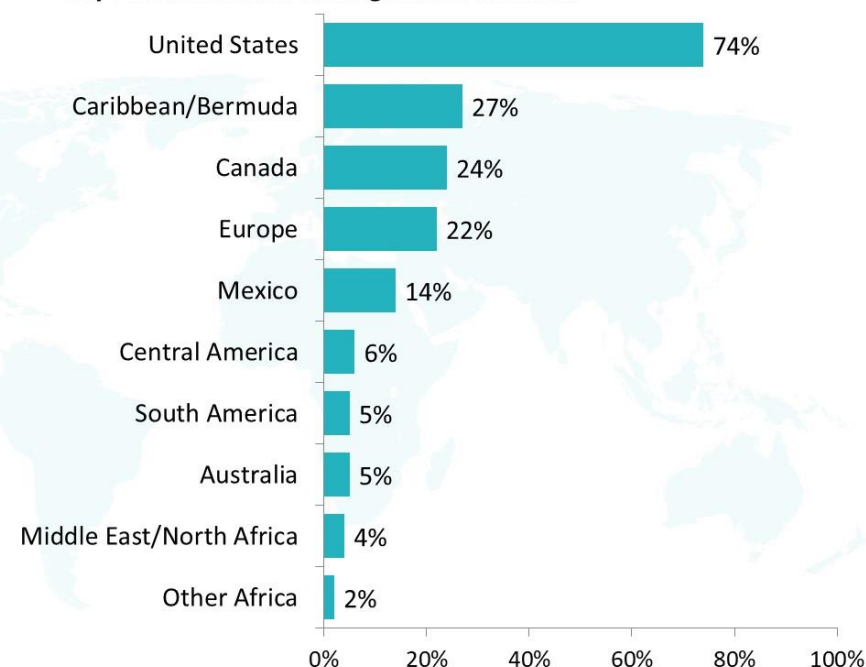
Domestic travel is most common among US travellers.

Those who have travelled for out of state pleasure trips of 2 or more nights within the past three years (where at least one night was in paid accommodations) were asked which destinations they visited during this period.

- As may be expected, the **United States** (74%) is the most often visited destination, distantly followed by the **Caribbean/Bermuda** (27%), **Canada** (24%), **Europe** (22%) and **Mexico** (14%).
- Fewer than one in ten each cite the destinations of **Central America** (6%), **South America** (5%), **Australia** (5%), the **Middle East/North Africa** (4%) and **other destinations in Africa** (2%).
- Older US travellers are more likely to have taken a domestic vacation within the United States in recent years (18-34: 62%, 35-54: 77%, 55-75: 87%). At the same time, across genders, while women are slightly more likely to have taken a domestic vacation (76% vs. men: 70%), men are more likely to have recently vacationed in Canada (30% vs. women: 21%).
- US travellers with higher household incomes are more likely to have traveled to Europe compared to their counterparts. (Table 8)



Destination Country
Key Aided Mentions Among Recent Travellers



Q.8: [IF 'YES' IN Q.4] Now we would like you to consider the vacation trips for pleasure purposes that you have taken in recent years. Again, please think for a moment about all of the out of state pleasure trips of 2 or more nights you have taken in the past 3 years where you spent at least 1 night in paid accommodations. What destinations did you visit on these trips? (n=2,265)

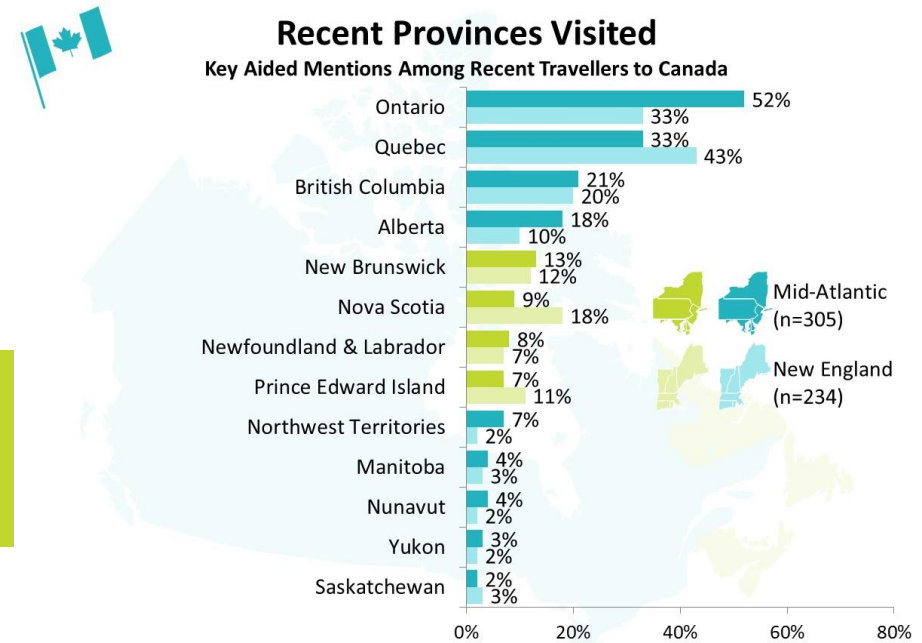
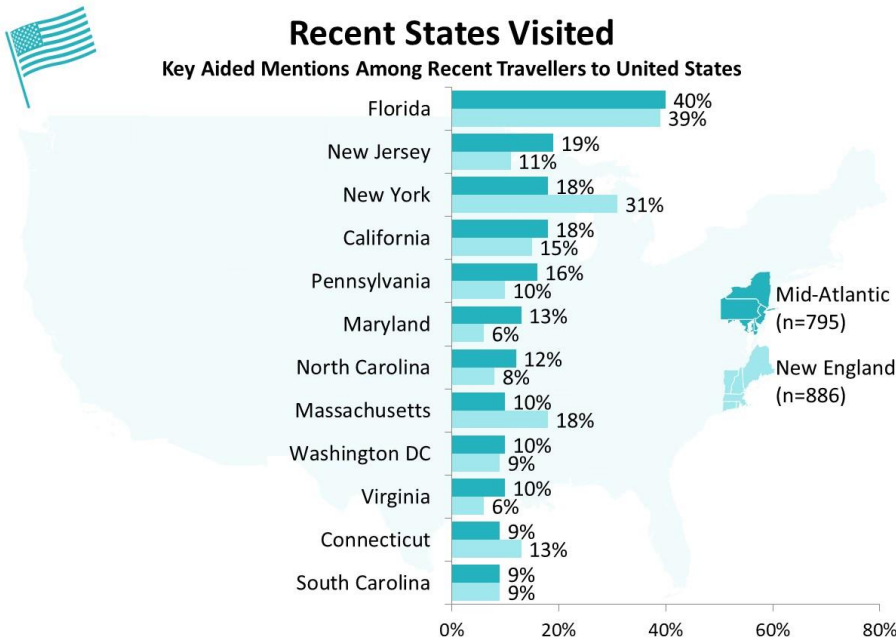


United States and Canadian Travel Destinations

While Florida is the most visited state in the United States among Mid-Atlantic and New England residents, while trips to Ontario and Quebec are also common.

Travellers who recently visited either the United States or Canada were asked to specify the states or provinces/territories they went to.

- While a wide range of destinations were mentioned, **Florida** is most often named among both **Mid-Atlantic** (40%) and **New England** (39%) travellers. Of note, **New York** is also often selected as a destination among **New England travellers** (31%).
- Overall, in terms of Canadian destinations, US travellers most commonly travelled to **Ontario** and **Quebec**. Visitation is highest in Ontario amongst those living in the Mid-Atlantic region (52% and 33%, respectively) while travel to Quebec is highest amongst those in the New England region (43% and 33%, respectively). As may be expected, visitation to each Atlantic province varies (NL 7%, PE 9%, NS 13%, NB 13%), with New England travellers being more likely than Mid-Atlantic travellers to have visited NS and PE. (Tables 9 and 10)



Older US travellers are more likely to have visited Nova Scotia compared to their younger counterparts (18-34: 7%, 35-54: 13%, 55-75: 23%).

Q.9: [IF 'UNITED STATES' IN Q.8] Which US States have you visited on an out of state vacation trips of 2 or more nights in the past 3 years?

Q.10: [IF 'CANADA' IN Q.8] Which Canadian provinces/territories have you visited on a pleasure trip of 2 or more nights in the past 3 years?





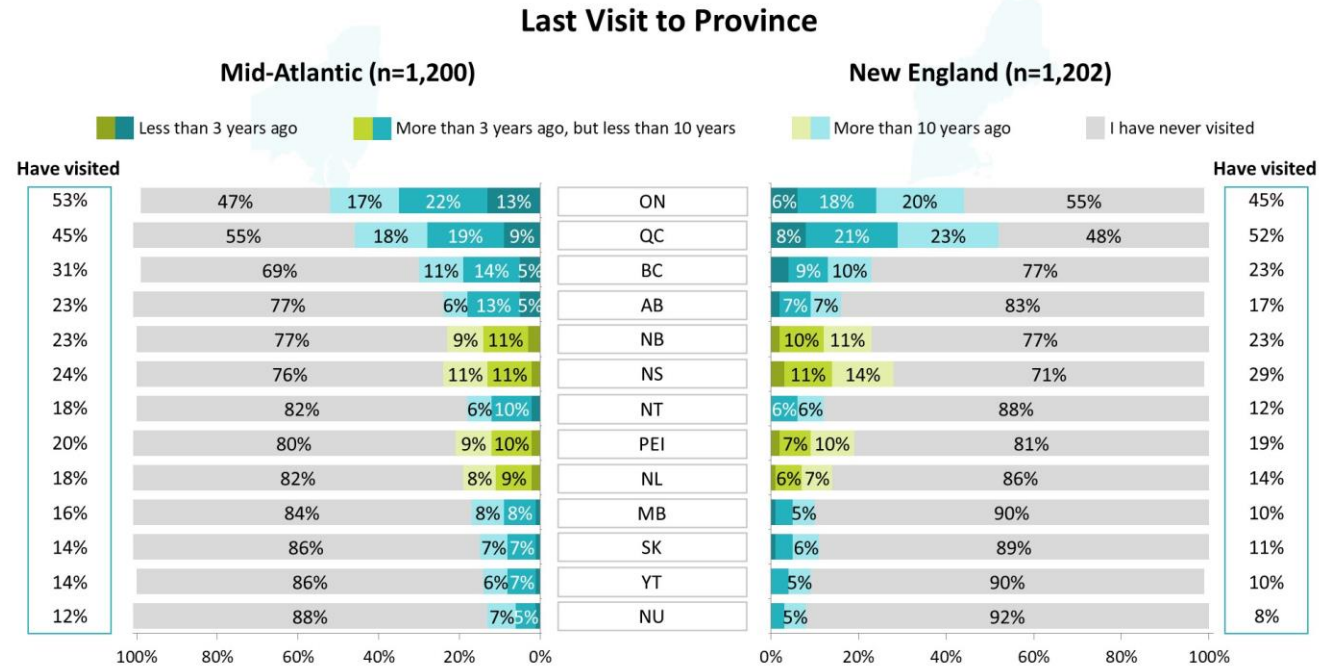
Past Visitation

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.

To better understand US travellers’ past vacation travel to Canada, those who had not visited specific provinces/territories in the recent past, were asked when, if ever, they last visited each province/territory. Results were then extrapolated to look at past visitation across the full survey base.

- Overall, US travellers most commonly report having visited Ontario and Quebec sometime in the past (49% for each). Results vary somewhat by region with those living in the Mid-Atlantic being more likely to have visited Ontario (53% vs. 45%), while those living in New England being more likely to have visited Quebec (52% vs. 45%).
- Between 16 and 27 percent of US travellers report to have visited each Atlantic Canada province sometime in the past, with most having visited at least more than three years ago. (Table 11)

Results are generally consistent across regions. Those living in the Mid-Atlantic are marginally more likely to have visited NL (18% vs. 14%), while those in New England are marginally more likely to have visited NS (29% vs. 24%).



Q.11: [And w/W]hen, if ever, did you last visit each of the following [other] Canadian provinces/territories, for a pleasure trip of 2 or more nights? *Due to rounding. Note: Mentions of 4% or less are represented by a bar.





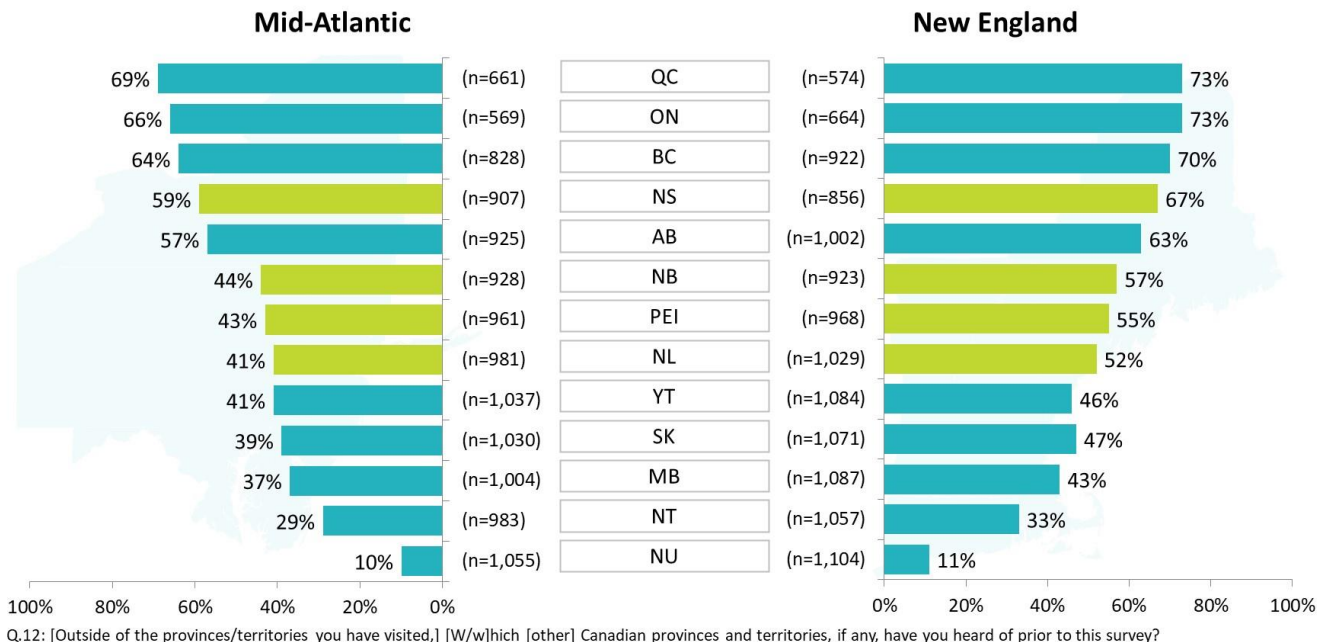
Awareness of Provinces Among Non-Visitors

Nova Scotia is the most heard of Atlantic Canadian province among non-visitors.

Outside of the specific provinces/territories they had previously visited, US travellers were asked which provinces/territories they had previously heard of.

- Among non-visitors, residents of New England are generally more likely than those living in the Mid-Atlantic to be aware of each Canadian province or territory, especially when it comes to the Atlantic region.
- Overall, **Quebec** (71%), **Ontario** (70%), **British Columbia** (67%) and **Nova Scotia** (63%) are the most common provinces non-visitors are aware of, closely followed by **Alberta** (60%).
- Other provinces/territories mentioned by approximately one-half of non-visitors include **New Brunswick** (51%), **Prince Edward Island** (49%), and **Newfoundland and Labrador** (47%), while slightly fewer have heard of **Saskatchewan** (43%), **Yukon** (43%), and **Manitoba** (40%).
- While three in ten (31%) of non-visitors have heard of the **Northwest Territories**, far fewer (10%) non-visitors to **Nunavut** have heard of the territory.
- In addition to the regional differences previously noted, older individuals, those with higher levels of education and those who are more affluent are also more likely than their respective counterparts to report awareness of each Canadian province or territory, except for Nunavut where awareness is generally consistent across these demographics. (Table 12)

Which Provinces Heard of Total Aided Mentions Among Non-Visitors





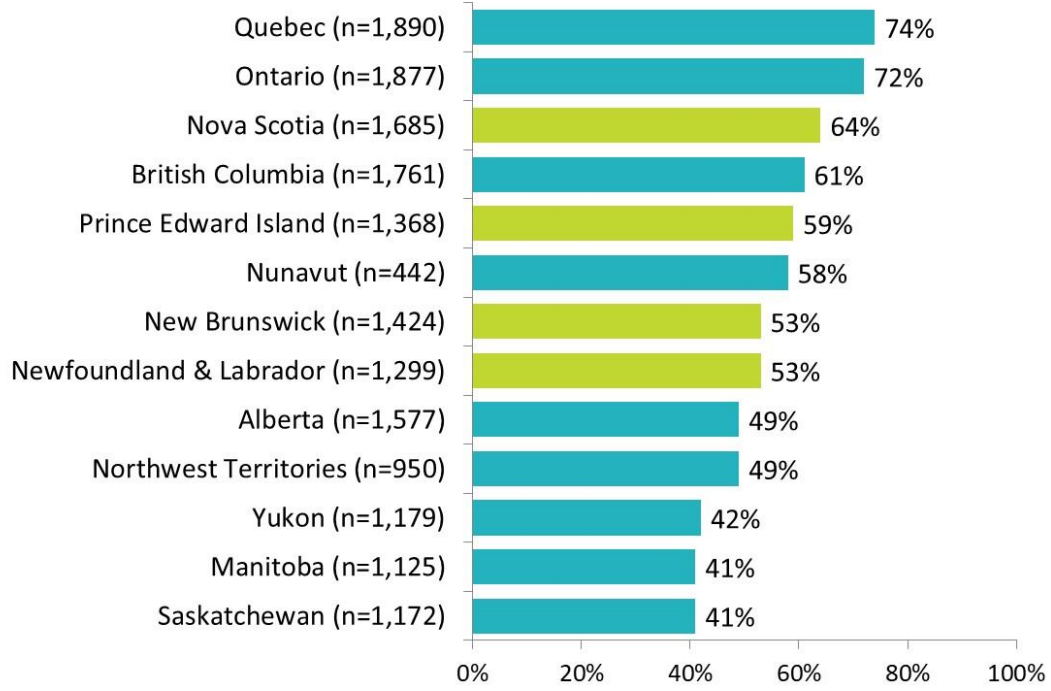
Familiarity with Provinces and Territories in Canada

Familiarity is highest with the provinces of Quebec and Ontario.

Of those provinces US travellers visited or heard of, respondents were asked how familiar they were with what to see and do while on vacation in these areas.

- Familiarity (either *very* or *somewhat*) is highest among the provinces of **Quebec** (74%) and **Ontario** (72%), followed by **Nova Scotia** (64%), **British Columbia** (61%), **Prince Edward Island** (59%) and **Nunavut** (58%). At the same time, approximately one-half of respondents express familiarity with the provinces/territories of **New Brunswick** (53%), **Newfoundland & Labrador** (53%), **Alberta** (49%) and the **Northwest Territories** (49%), while familiarity is slightly lower with regards to the **Yukon** (42%), **Manitoba** (41%) and **Saskatchewan** (41%).
- Across demographics, US travellers aged 54 years and younger are more likely to be familiar with the Atlantic provinces (PEI, NS, NL and NB) compared to travellers aged 55 years and older. Familiarity of all four Atlantic provinces is higher among men than women. (Table 13)

Very/Somewhat Familiar with Provinces Among Past Visitors and Non-Visitors Who Are Aware



Q.13: [NOT IF 'NONE OF THE ABOVE' IN Q.12] How familiar are you with what there is to see and do in [this/these] provinces/territories while on vacation



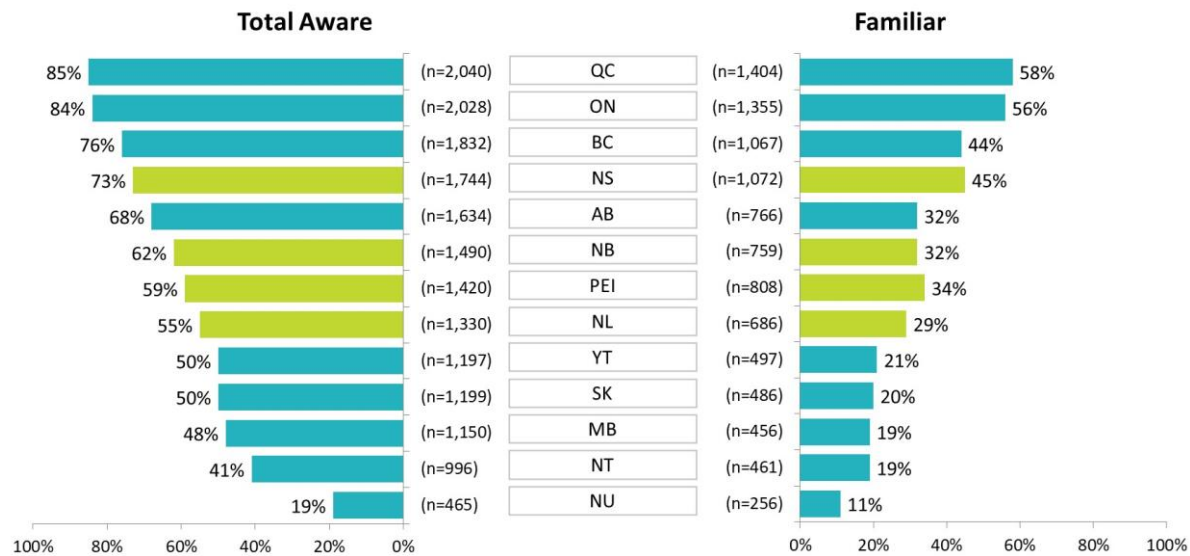
Awareness & Familiarity Overall

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

Extrapolating results to the broader population, the following provides a summary of total awareness and familiarity of the US Traveller market.

- As noted, **Quebec** and **Ontario** enjoy the highest level of overall awareness (visited/heard of), with more than eight in ten US travellers being aware of each province (85% and 84%, respectively), closely followed by **British Columbia** (76%), and **Nova Scotia** (73%). At the same time, more than one-half of US travellers overall are aware of each of the other Atlantic Canadian provinces (NB: 62%; PEI: 59%; NL: 55%).
- Familiarity is highest for the two central provinces, Quebec and Ontario, with more than one-half being familiar with what there is to see and do in each. Nearly one-half (45%) of US travellers overall consider themselves familiar with what **Nova Scotia** has to offer, while approximately one-third of US travellers overall consider themselves familiar with each of the other three Atlantic provinces (PEI: 34%; NB: 32%; NL:29%).

Total Awareness and Familiarity of the US Travellers' Market





What Travellers Expect to See and Do in New Brunswick

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

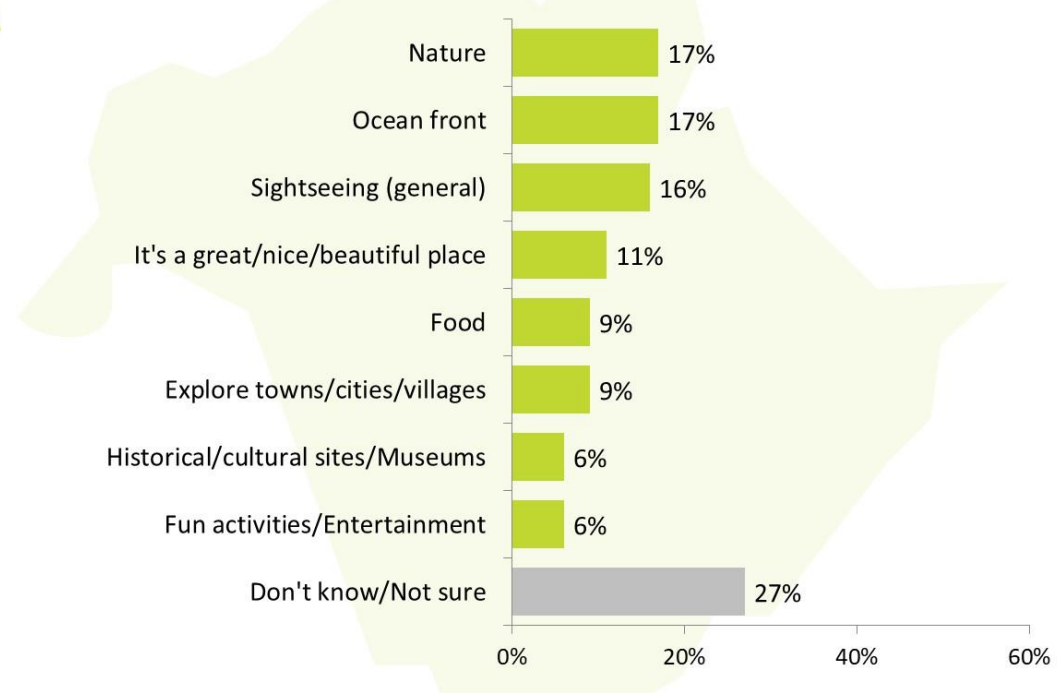
US travellers who were *somewhat* or *very* familiar with each Atlantic province were asked what they would expect to see and do in that province based on what they have previously seen, heard of, or know.

New Brunswick

- **Nature** (17%), the **ocean front** (17%) and **sightseeing in general** (16%) are listed as top expectations of what to see and do in New Brunswick. This is followed by the expectation of the province being a **great/nice/beautiful place** (11%) with the ability to explore the **food** (9%), **towns/cities/villages** (9%), **historical/cultural sites/museums** (6%) or **fun activities/entertainment** (6%).
- Interestingly, despite having some level of familiarity with the province, a large minority (27%) are **not sure** as to what there is to see/do while vacationing in New Brunswick.
- US travellers from New England are more likely than those living in the Mid-Atlantic to expect the ocean front, including the coastline and beaches (23% vs 11%, respectively). (Table 14)



Expect to See/Do in NB Key Unaided Mentions Among Those Familiar with NB



"Drink craft beer and see a lighthouse."

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

"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."

Q.14: IF 'SOMEWHAT' OR 'VERY FAMILIAR' WITH NEW BRUNSWICK IN Q.13D] Based on what you have seen, heard and know, what would you expect to see and do during a vacation in New Brunswick? (n=759)





What Travellers Expect to See and Do in Newfoundland & Labrador

Outdoor activities are highly aligned with what to see or do in Newfoundland & Labrador.

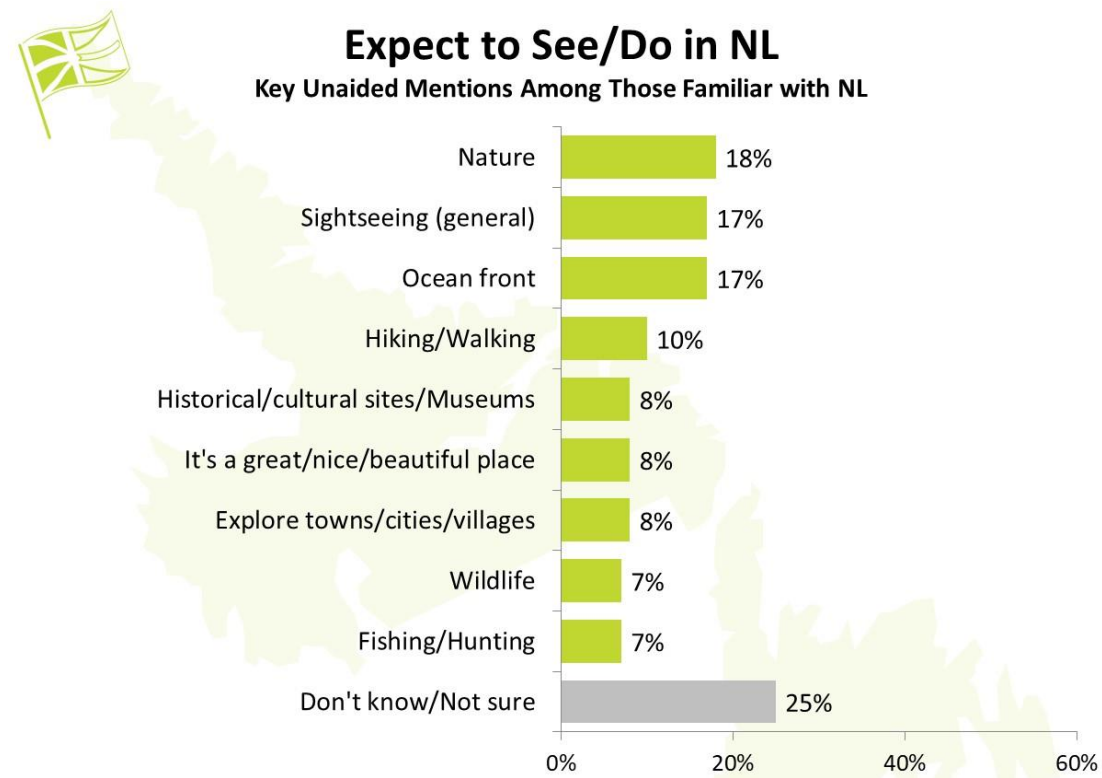
Newfoundland & Labrador

- Expectations of Newfoundland & Labrador tend to focus on the outdoors, specifically in relation to **nature** (18%), **general sightseeing** (17%), and the **ocean front** (17%).
- Other expectations mentioned by fewer than one in ten travellers include **hiking/walking** (10%), **historical/cultural sites/museums** (8%), being a **great/nice/beautiful place** (8%), exploring **towns/cities and villages** (8%), the ability to see **wildlife** (7%), and participate in **fishing/hunting** (7%).
- As with New Brunswick, a notable minority (25%) of those familiar with Newfoundland and Labrador are still **not sure** what there is to see/do while vacationing there.
- Younger US travellers (aged 18-34) are more likely to express uncertainty or have no expectations when it comes to the province (18-34: 35%, 35-54: 20%, 55-75: 20%). (Table 15)

"Visit parks and see amazing wildlife. Mostly outdoor activities."

"I'd expect to take scenic drives along the coast and enjoy the local dishes (e.g., Figgy Duff pudding)."

"I would want to experience the unique culture and hospitality of Newfoundland by visiting charming fishing villages, attending lively local festivals, and enjoying traditional music and cuisine."



Q.15: IF 'SOMEWHAT' OR 'VERY FAMILIAR' WITH NEWFOUNDLAND & LABRADOR IN Q.13E] Based on what you have seen, heard and know, what would you expect to see and do during a vacation in Newfoundland & Labrador? (n=686)





What Travellers Expect to See and Do in Nova Scotia

The ocean front, sightseeing in general and nature are top expectations of what to do and see in Nova Scotia.

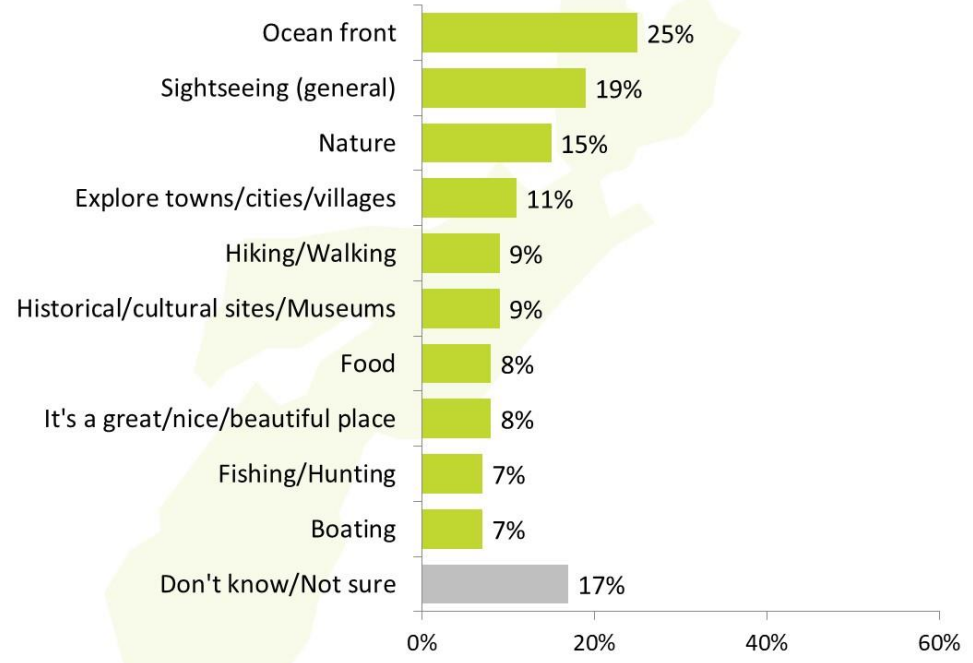
Nova Scotia

- Similar to other provinces, the **ocean front** (25%), **sightseeing in general** (19%), and **nature** (15%) are rated highly for what is expected to see/do when visiting Nova Scotia.
- One in ten travellers expect to **explore towns/cities/villages** (11%) when visiting the province, while similar portions express expectations related to **hiking/walking** (9%), being able to explore **historical/cultural sites/museums** (9%), **food** (8%), or Nova Scotia being **great/nice/a beautiful place** (8%). A few expect activity-based excursions such as **fishing/hunting** (7%) and **boating** (7%).
- Fewer than two in ten (17%) US travellers familiar with Nova Scotia **are not sure** (17%) what there is to see and do in the province.
- New England travellers are more likely than those living in the Mid-Atlantic to expect to see the **ocean front**, including **coastline** and **beaches**. (Table 16)



Expect to See/Do in NS

Key Unaided Mentions Among Those Familiar with NS



Q.16: IF 'SOMEWHAT' OR 'VERY FAMILIAR' WITH NOVA SCOTIA IN Q.13G] Based on what you have seen, heard and know, what would you expect to see and do during a vacation in Nova Scotia? (n=1,072)

"Mining towns, scenic drives, historic villages."

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

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

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





What Travellers Expect to See and Do in Prince Edward Island

The ocean front is most often cited regarding what to see/do in PEI, followed by sightseeing in general and nature.

Prince Edward Island

- When asked what they would expect to see and do in Prince Edward Island, once again a common theme among US travellers is exploring the **ocean front** (31%), followed by **sightseeing in general** (19%).
- At the same time, expectations related to **nature** (14%), PEI being a **great/nice/beautiful place** (11%), and access to **seafood** (10%) or **food** (9%) are each mentioned by at least one in ten travellers, closely followed by **historical/cultural sites/museums** (8%), the **Green Gables Heritage Place/Anne of Green Gables House** (8%), and **boating** (8%).
- One in six (16%) US travellers familiar with the province are **unsure** as to what visitors can see or do during a Prince Edward Island vacation.
- Once again, residents from New England are more likely than those living in the Mid-Atlantic to expect to see the **ocean front**, including the **coastline** and **beaches**. (Table 17)

“Enjoy the ocean views and spend family time in a nice cabin.”

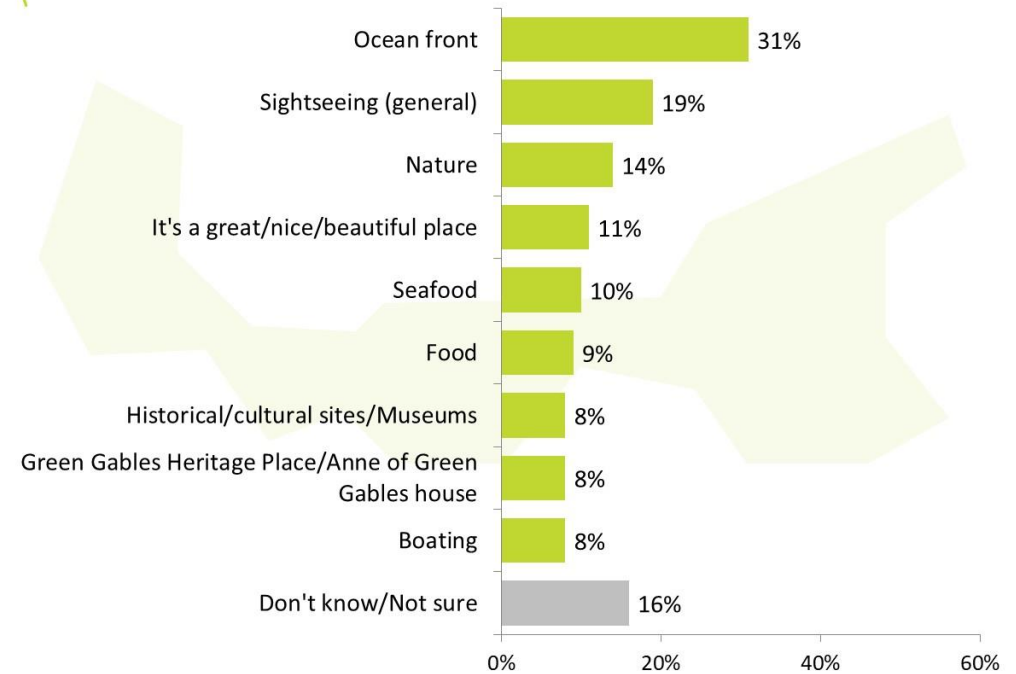
“Visit antique historic sites and building, hike, visit sites relating to the famous book Anne Of Green Gables. Visit estate sales, antiques shops, yard sales and flea markets. Patronize small, quirky local restaurants for off beat food. See what the locals do.”

“Eat lots of PEI mussels, sightseeing boats, shop.”



Expect to See/Do in PEI

Key Unaided Mentions Among Those Familiar with PEI



Q.17: IF 'SOMEWHAT' OR 'VERY FAMILIAR' WITH PRINCE EDWARD ISLAND IN Q.13J] Based on what you have seen, heard and know, what would you expect to see and do during a vacation in Prince Edward Island? (n=808)



Factors Impacting Destination Choice

The following section provides an overview of respondents' decision-making process when choosing a pleasure trip destination.



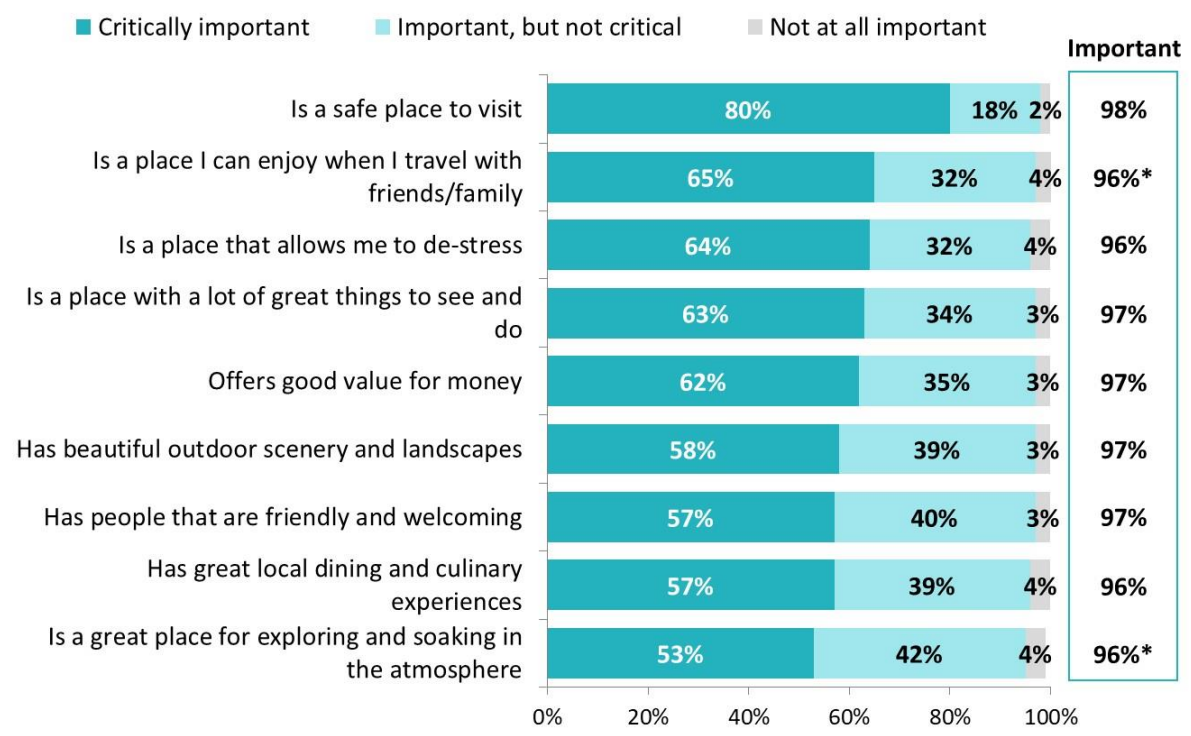
Important Factors When Choosing a Location

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

All respondents were asked to think about all the places they travelled to on pleasure trips over the past year years and indicate the level of importance placed on various factors when considering a destination for a pleasure trip, by indicating whether they felt the factor was 'critically important', 'important, but not critical', or 'not at all important'.

- While all factors assessed held some level of importance in their decision by a majority of US travellers, a location being a **safe place to visit** is clearly seen as key, with eight in ten (80%) considering this to be *critical* factor in their decision.
- Other factors considered critically important to nearly two-thirds of travellers include the destination being **a place they can enjoy when travelling with friends/family** (65%), **a place that allows them to de-stress** (64%), **a place with a lot of great things to see/do** (63%), and a place that **offers good value for money** (62%). Slightly fewer place the same level of importance on a destination having **beautiful outdoor scenery and landscapes** (58%), **people that are friendly and welcoming** (57%), **dining and culinary experiences** (57%) and the location being great for **exploration/the atmosphere** in general (53%). (Table 18a-y)

Importance of Factors When Choosing Location



Q.18a-y: Please think for a moment about all the places you have traveled to on pleasure trips over the past few years. When selecting a destination, please identify the level of importance placed on each of the following factors in your decision. (n=2,402)
*Due to rounding.



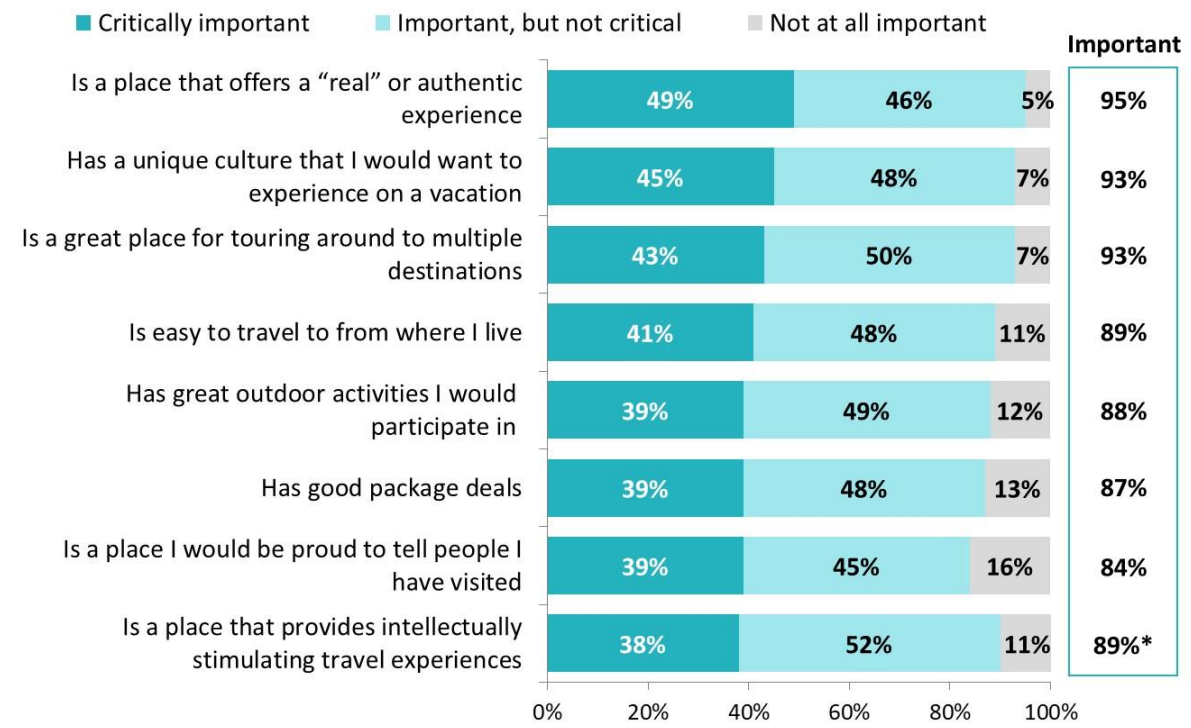


Important Factors When Choosing a Location – *Continued*

Authentic experiences and culture are also areas of high importance among US travellers.

- At the same time, one-half (49%) of travellers place critical importance on a place offering a **“real” or authentic experience** when choosing a destination, while slightly fewer place the same level of importance on choosing a destination with a **unique culture** (45%) or being able to **tour around to multiple destinations** (43%).
- **Ease of travel from home** (41%), **having great outdoor activities of interest** (39%), offering **good package deals** (39%), being a **proud place to visit** (39%), and having an **intellectually stimulating travel experience** (38%), are all factors considered critically important to four in ten US travellers. (Table 18a-y)

Importance of Factors When Choosing Location



Q.18a-y: Please think for a moment about all the places you have traveled to on pleasure trips over the past few years. When selecting a destination, please identify the level of importance placed on each of the following factors in your decision. (n=2,402)
 *Due to rounding.

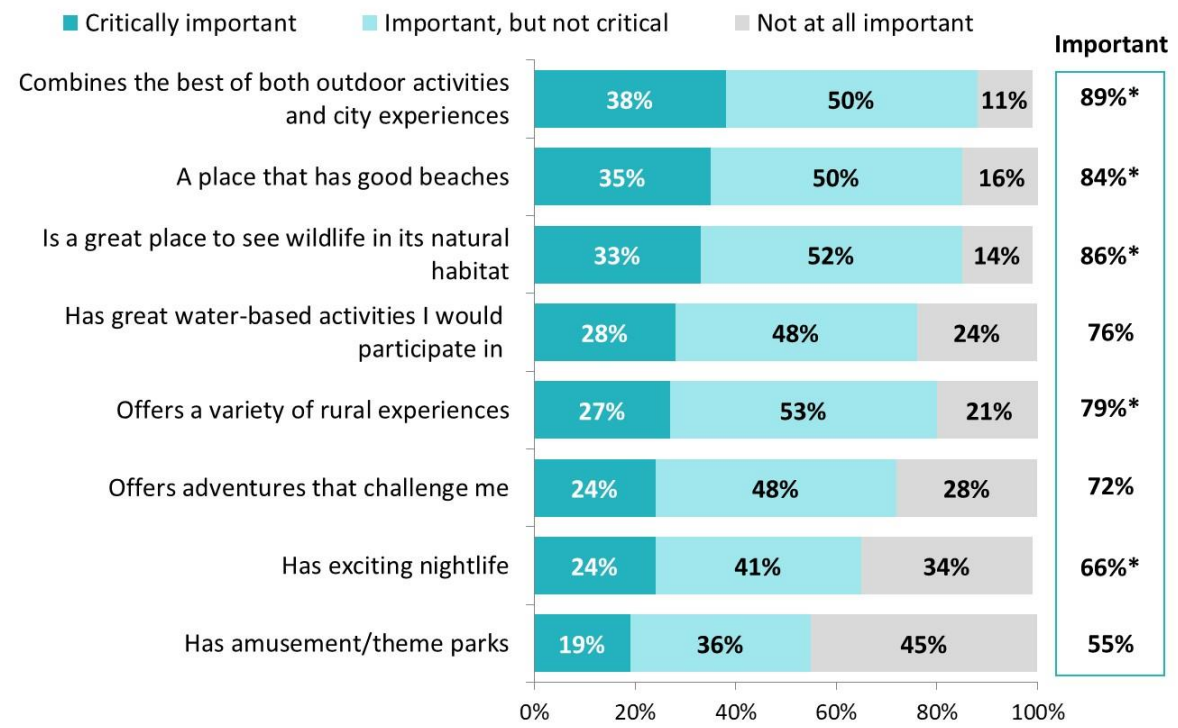


Important Factors When Choosing a Location – *Continued*

Appeal of the outdoors and nature is also rated highly, while nightlife and amusement parks are considered less critical in destination choice.

- Other factors, while clearly seen as important, are less critical in travellers’ choice of destination. These include the ability to be around **outdoor activities and city experiences** (38%) and access to outdoor spots including, **good beaches** (35%), the ability to see **wildlife in its natural habit** (33%), and the access of **water-based activities** (28%).
- Just over one-quarter (27%) of travellers consider having a **variety of rural experiences** to be critically important in their decision, while similar portions place the same level of importance on having **challenging adventures** (24%), and an **exciting nightlife** (24%).
- Having **amusement/theme parks** (19%) has the least critical importance in a traveller’s choice of destination; however, more than one-half (55%) place some level of importance on this factor.
- Younger travellers and those from the Mid-Atlantic region are more likely than their respective counterparts to place importance on a place having an exciting nightlife.
- Regionally, Mid-Atlantic travellers are also more likely than those living in New England place importance on amusement/theme parks (61% vs. 50%). (Table 18a-y)

Importance of Factors When Choosing Location



Q.18a-y: Please think for a moment about all the places you have traveled to on pleasure trips over the past few years. When selecting a destination, please identify the level of importance placed on each of the following factors in your decision. (n=2,402)
 *Due to rounding.



Travel Intentions

The following section provides an overview of respondents' future travel intentions for pleasure purposes, including considerations of Atlantic Canada.



Intentions to Visit the US

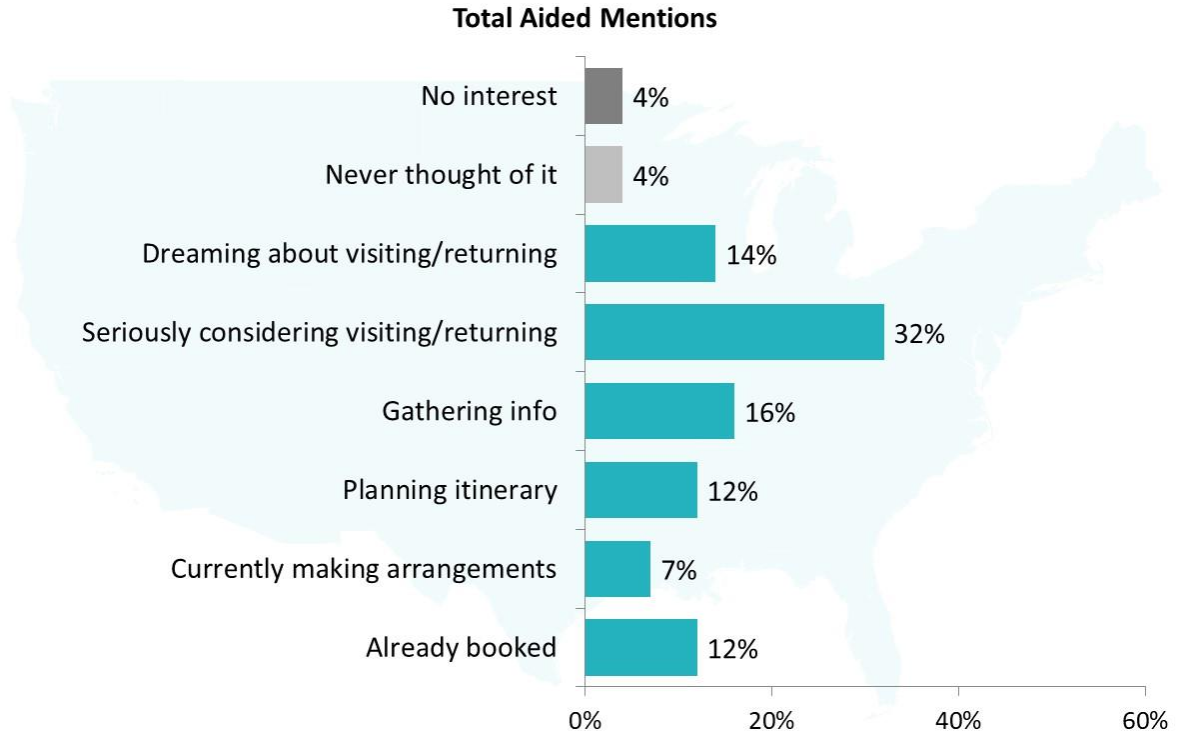
While one-half of travellers have either already booked or plan to book a trip within the US in the next two years, a similar percentage are seriously considering doing so.

Again, regardless of future vacation intentions, all respondents were asked to indicate their intentions of taking a pleasure trip to specific regions in the next two years, including domestic trips (outside their home State, but within the US), trips to Canada, Mexico and Europe.

Domestic Travel / Within the United States

- Nearly all US travellers express some level of intention to take a pleasure trip within the US over the next two years, with nearly one-half of travellers having active travel plans by already **gathering information** (16%), **planning their itinerary** (12%), **being in the process of making arrangements** (7%) or **having already booked** (12%).
- A similar percentage indicate they are **dreaming** (14%) or **seriously considering visiting/returning** (32%) of taking a domestic pleasure trip in the next two years.
- Fewer than one in ten cite they have **never thought of taking a domestic pleasure trip outside their home state** (4%) or **have no interest** in doing so (4%).
- Older US travellers are more likely to be seriously considering visiting/returning compared to their younger counterparts (18-34: 27%, 35-54: 30%, 55-75: 40%).
- Travellers with higher household incomes are more likely to have already made arrangements (\$150K+: 20% vs. >\$75K: 10% and \$75-150K: 12%). (Table 19a)

Intentions to Visit Within US in Next 2 Years



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



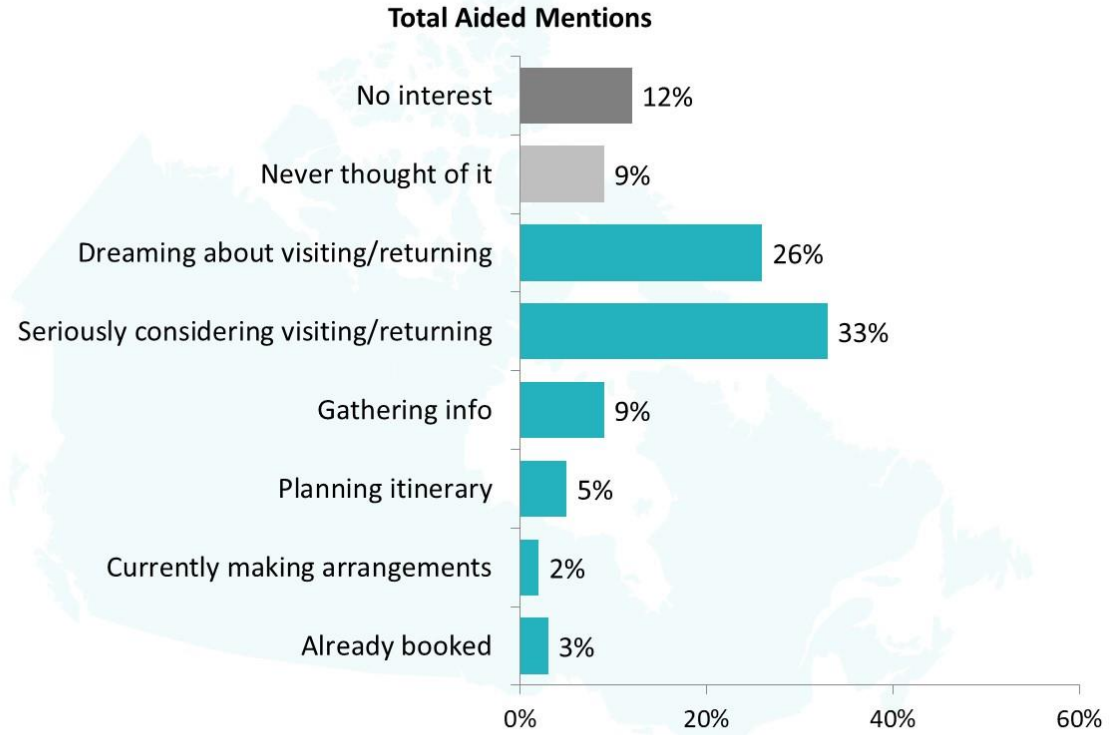
Intentions to Visit Canada

While more travellers are likely to consider Canada as a destination, there is less concrete activity in the planning of trips in the next two years.

Canada

- When compared to United States travel intentions, two in ten US travellers are actively planning to visit Canada, by **gathering information** (9%), **planning their itinerary** (5%), **currently making arrangements** (2%), or having **already booked** (3%) their trip.
- That said, even those not in the active planning stage largely appear open to the idea of taking a trip to Canada, with six in ten indicating they are either **dreaming** (26%) or **seriously considering visiting/returning** to Canada (33%).
- Two in ten travellers have **never thought of Canada as a destination** (9%) or **have no interest** (12%) in visiting Canada.
- Once again, older travellers are more likely to indicate they are seriously considering visiting/returning to Canada compared to younger travellers (18-34: 27%, 35-54: 35%, 55-75: 39%) (Table 19b)

Intentions to Visit Canada in Next 2 Years



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)



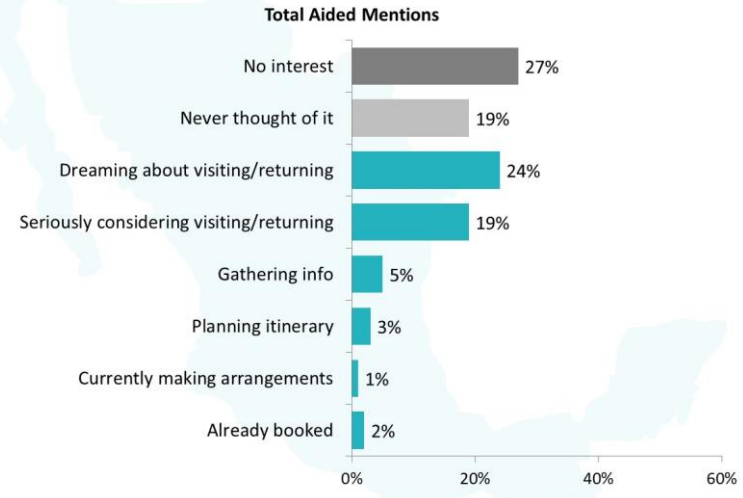
Intentions to Visit Mexico & Europe

While few have made arrangements for trips to Mexico or Europe, Europe holds broad appeal to US travellers.

Mexico

- Nearly one-half of travellers have *never thought of visiting Mexico* (19%) or *have no interest* (27%). While a strong minority are *dreaming about such a trip* (24%) or are *seriously considering visiting/returning* (19%), only a small percentage are actively planning for such a trip by *gathering information* (5%), *planning their itinerary* (3%), *currently making arrangements* (1%), or having *already booked* (2%).
- New England travellers (31%) and older travellers are less likely than their respective counterparts to visit Mexico. (Table 19c)

Intentions to Visit Mexico in Next 2 Years

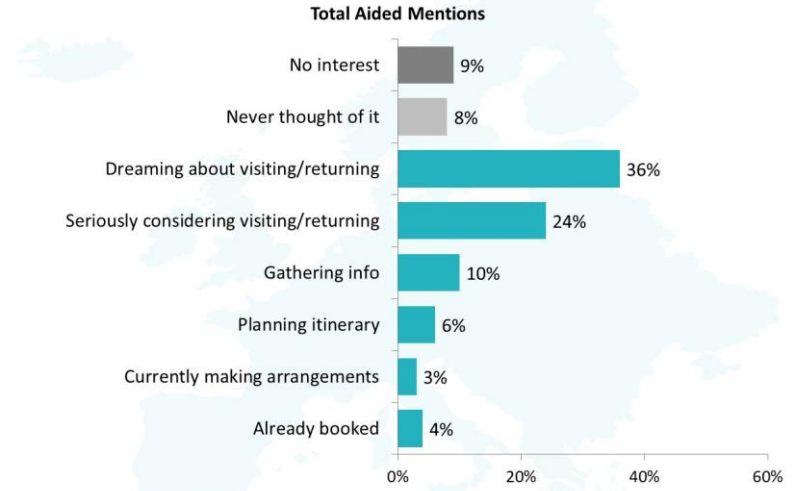


Q.19c: Please indicate which statement best describes your intentions to visit Mexico for a pleasure trip of 2 or more nights in the next 2 years? (n=2,402)

Europe

- Six in ten travellers reportedly are *dreaming about visiting Europe* (36%) or are *seriously considering visiting/returning* to the region (24%), while nearly one-quarter are actively planning such a trip by *gathering information* (10%), *planning their itinerary* (6%), *currently making arrangements* (3%), or *have already booked* (4%). Fewer than two in ten have *never thought of visiting Europe* (8%) or *have no interest* (9%).
- Of note, women are more likely than men to dream about visiting or returning to Europe (40% vs 28%). (Table 19d)

Intentions to Visit Europe in Next 2 Years



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

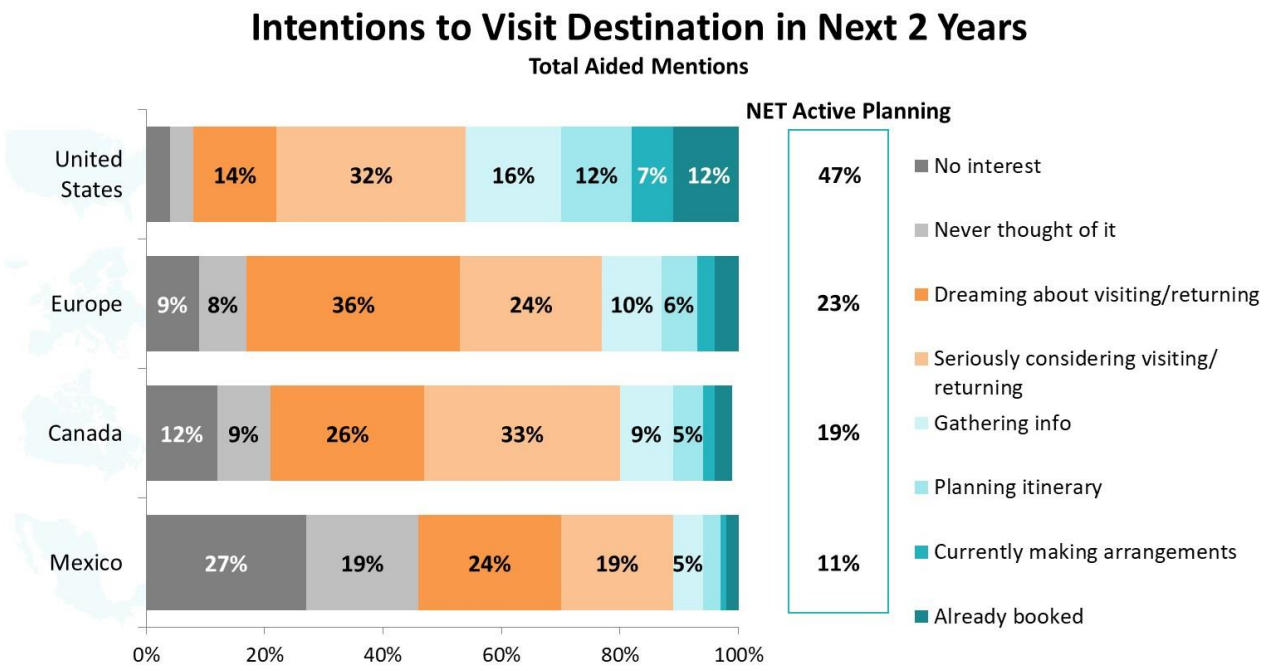




Intentions to Visit – Destination Comparison

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

- Overall, US travellers are notably more likely to express definite travel plans when thinking of vacationing within their own country, while Europe and Canada tend to be more 'dream' destinations. Conversely, Mexico appears to be least popular as a pleasure trip destination.
- Results are generally consistent between those living in the Mid-Atlantic and New England regions. That said, those living in New England are less likely than those living in the Mid-Atlantic to express any level of interest in taking a pleasure trip to Mexico. (Tables 19a-d)



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.





States and Provinces Likely to Visit

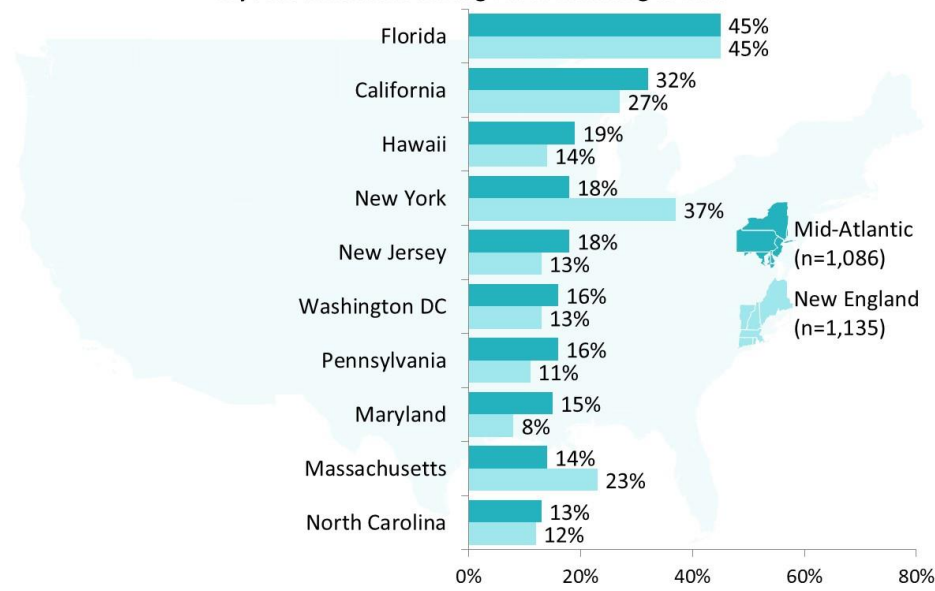
Similar to recent states and provinces visited, Florida and New York are listed highly among US states, while Ontario and Quebec remain top answers among provinces likely to visit.

US travellers who intend to visit a US state, outside their home state, or Canadian province/territory in the next two years were asked where this would be. Note this did not include travellers who indicated they never thought of visiting either country or who were not interested.

- Among **US states**, Florida is the most selected state by both **Mid-Atlantic** (45%) and **New England** (45%) travellers, with **New York** (37%) also being a top mention by **New England** residents. Among **Canadian provinces**, Ontario and Quebec are top mentions among both **Mid-Atlantic** (39% and 32%, respectively) and **New England** travellers (27% and 39%, respectively) intending to visit in the next two years.
- Overall, intentions to visit Atlantic Canadian provinces vary (NL 6%, PE 11%, NS 15%, NB 9%), with New England travellers being more likely than Mid-Atlantic travellers to visit NS and PE. (Tables 20-21)

States Likely to Visit in Next 2 Years

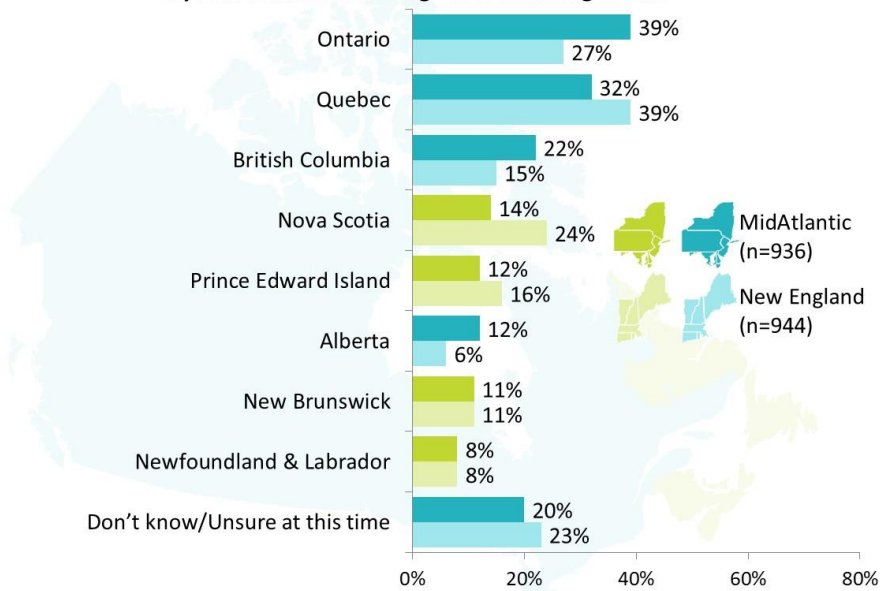
Key Aided Mentions Among Those Intending to Visit



Q.20: [NOT IF 'NEVER THOUGHT OF IT/NO INTEREST' IN Q.19] Which US states, excluding your home state, are you likely to visit in the next two years?

Provinces Likely to Visit in Next 2 Years

Key Aided Mentions Among Those Intending to Visit



Q.21: [NOT IF 'NEVER THOUGHT OF IT/NO INTEREST' IN Q.19] Which Canadian provinces/territories are you likely to visit in the next 2 years?





Preferred Regional Destination

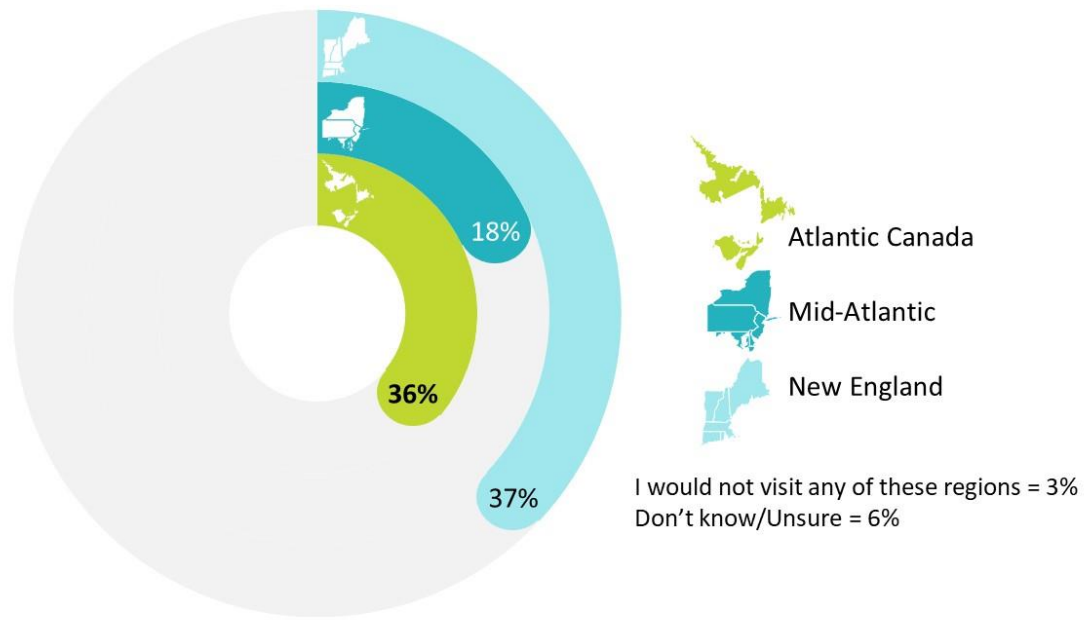
Overall, Atlantic Canada and New England are equally preferred regional destinations.

To better understand overall appeal of each region, respondents were asked to identify which region (New England, Mid-Atlantic or Atlantic Canada) they would ultimately choose as a vacation destination, given a choice between the three.

- Overall, travellers express equal preference for **New England** (37%) and **Atlantic Canada** (36%), while far fewer would choose to visit the **Mid-Atlantic** (18%). While Mid-Atlantic residents similarly express equal preference for **New England** or **Atlantic Canada** (34% and 32%), perhaps unsurprisingly, they are also more likely than those living in New England to choose the **Mid-Atlantic** as their preferred regional destination (24% vs. 12%).
- Those with previous experience visiting Atlantic Canada, those who typically travel with children, and those with higher levels of education are more likely to choose **Atlantic Canada** as the preferred vacation destination. (Table 22)

Preferred Region

% Selected



Q.22: Assuming you had a choice of visiting New England, the Mid-Atlantic States, or Atlantic Canada for a vacation, but you could only choose one of these regions, which would you choose to visit for a vacation? (n=2,402)



Preferred Regional Destination - *Continued*

Reasons for preferring Atlantic Canada most commonly center around a desire to go somewhere new/far from home

Reasons for Preferring Atlantic Canada

- For those who would choose Atlantic Canada as a vacation destination over New England and the Mid-Atlantic (n=869), reasons for their preference were primarily driven by a ***desire to go somewhere new/far from home/already familiar with the other regions*** (43%), distantly followed by having ***heard good things/wanting to visit/it being more interesting than other regions*** (22%), ***scenery/nature/wildlife*** (18%), and ***liking the area/having enjoyed previous trips to the region*** (11%). Alternative reasons mentioned less often include, ***lots of attractions*** (9%), the ***people/culture/atmosphere*** (8%), and a ***general desire for exploration/adventure*** (6%). (Table 23: Atlantic Canada)

Reasons for Preferring the Mid-Atlantic or New England

- For those who would choose the Mid-Atlantic over Atlantic Canada and New England (n=434), reasons most commonly center around a ***desire to be close to home/convenience/affordability to travel to the destination*** (19%), ***liking the region/enjoying previous trips to the region*** (15%), and ***lots of attractions*** (12%). (Table 23: Mid-Atlantic)
- Alternatively, those preferring New England over the other two regions (n=880) most commonly attribute this to ***scenery/nature/wildlife*** (22%), a ***desire to be close to home/convenience/affordability to travel to the destination*** (19%), ***lots of attractions*** (18%), and ***liking the region/enjoying previous trips to the region*** (16%). (Table 23: New England)

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





Ways to Encourage Travel to the Atlantic Canada Region

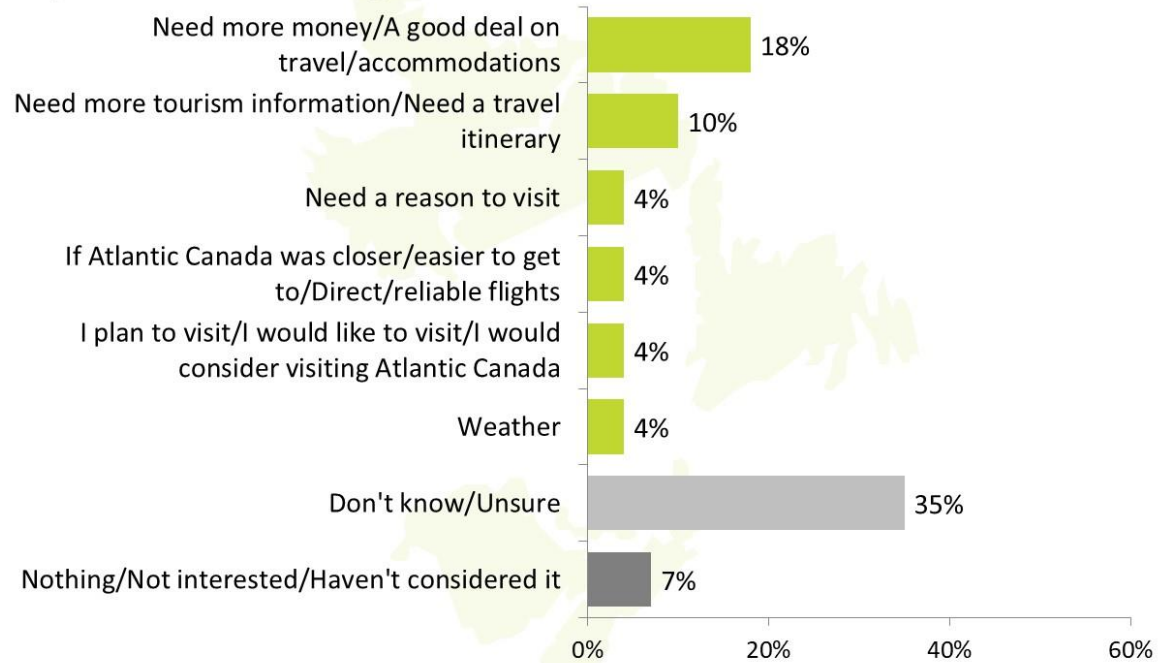
Those who prefer the Mid-Atlantic or New England as a destination location over Atlantic Canada most commonly express uncertainty as to what it would take for them to choose Atlantic Canada instead. Of those who did provide a response, financial considerations / the availability of a good deal are most likely to impact consideration to visit Atlantic Canada.

Those who selected the Mid-Atlantic or New England regions as their preferred vacation destination over Atlantic Canada (n=1,533) were subsequently asked, what would need to change for them to choose Atlantic Canada instead.

- Respondents provided a variety of motivators that would encourage them to choose Atlantic Canada over their preferred choice, with *improved finances/financial incentives* (18%) mentioned most often, followed by the *need for additional tourism information/travel itinerary* (10%). Other factors mentioned by fewer than five percent of travellers included *needing a reason to visit, improved/easier access, and weather*. In addition, a few (4%) noted that, while not their preferred destination choice out of the three options presented, they had an *intention or desire to visit Atlantic Canada*.
- One-third of travellers were *unsure* (35%) what would encourage them to choose Atlantic Canada over the Mid-Atlantic or New England. (Table 24)

What Would Need to Change for You to Select Atlantic Canada

Key Unaided Mentions Among Those Who did not Choose Atlantic Canada to Visit for Vacation



Q.24: [IF 'ATLANTIC CANADA' NOT CHOSEN AT Q.22] What would need to change for you to choose Atlantic Canada as a vacation destination? (n=1,533)





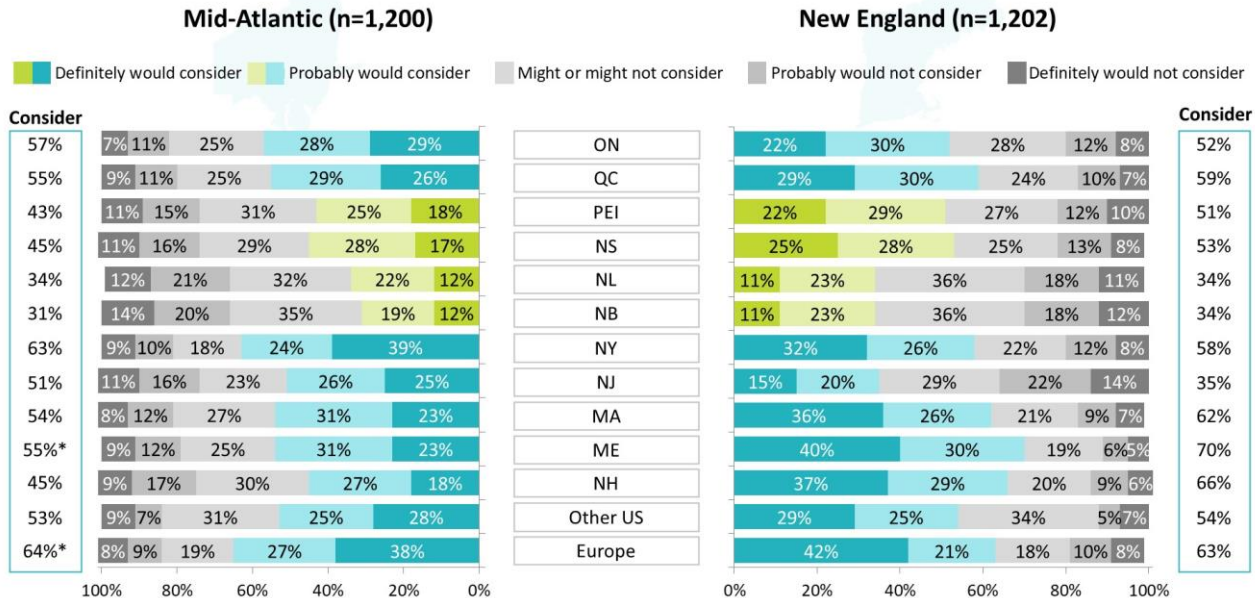
Consideration of Specific Travel Destinations

A notable minority of US travellers would consider travelling to each Atlantic province for vacation purposes within the next couple of years.

Respondents were asked how likely they would be to consider various destination locations for vacation purposes, within the next two years.

- When it comes to Atlantic Canada, overall, US travellers are most likely to indicate they would definitely or probably consider visiting **Nova Scotia** (49%) or **Prince Edward Island** (47%), while one-third of travellers expressed the same level of consideration to visiting **Newfoundland & Labrador** or **New Brunswick** (34% and 33%, respectively). Willingness to consider Newfoundland & Labrador and New Brunswick is generally consistent across the two US markets; however, those living in New England are more likely than those living in the Mid-Atlantic region to consider Nova Scotia (53% vs. 45%) or Prince Edward Island (51% vs. 43%).
- Propensity to consider various vacation destinations vary across demographics. In particular, those who travel with children tend to be more likely than others to express consideration to travel to a wide-range of destinations for vacation, while those with higher household incomes are generally more likely to consider vacation destinations outside the United States. (Table 25)

Likely to Consider Each Vacation Destination in the Next 2 Years



Q.25: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following destinations as part of a vacation trip of 2 or more nights away from home, where at least 1 night is spent in paid accommodations? (Again, this excludes any travel that would be solely for business purposes, trips to your own cottage, and trips for personal reasons such as attending a wedding/funeral, for medical reasons, etc.). *Due to rounding.





Likelihood to Consider Atlantic Canada

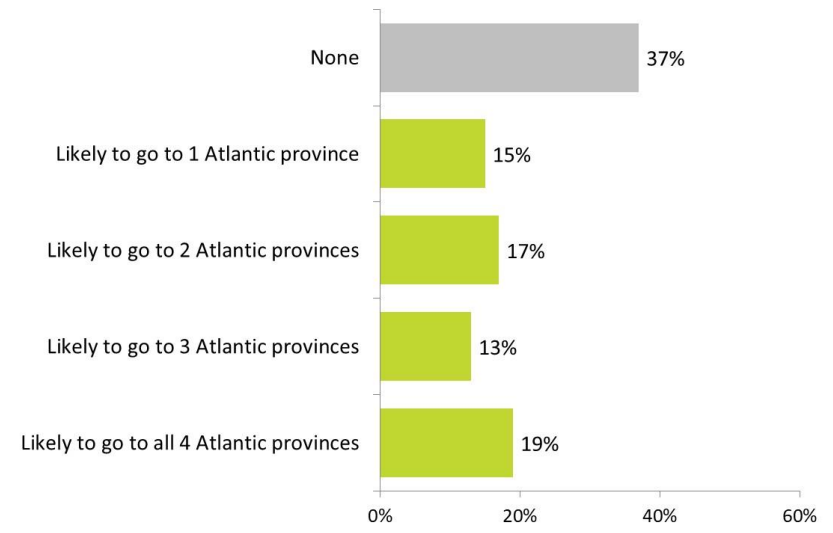
A clear majority of US travellers are likely to consider visiting the Atlantic Canada region over the next two years.

In order to further assess the likelihood of travel to the Atlantic Canada region over the next two years, the number of Atlantic Canada provinces travellers reported they would *definitely* or *probably* consider in the next two years was calculated.

- Overall, the bulk of travellers indicate they would likely consider visiting the Atlantic Canada region in the near future, with nearly two-thirds (63%) expressing some likelihood of visiting at least one Atlantic province over the next two years, while two in ten (19%) expressed some level of consideration in visiting **all four** Atlantic Canada provinces.
- Again, travel intentions vary somewhat by location with those living in New England being slightly more likely than those living in the Mid-Atlantic region to consider at least one Atlantic Canada province in the near future (66% vs. 60%). At the same time, those who visited Atlantic Canada in the past and those with children at home are notably more likely than their respective counterparts to express consideration of visiting at least one Atlantic Canada province for vacation in the next two years. (Table 25a-c,e combined)

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



Q.25a, b, c, & e [COMBINED]: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following destinations as part of a vacation trip of 2 or more nights away from home, where at least 1 night is spent in paid accommodations? Number of Atlantic Provinces Definitely or Probably would consider visiting. (n=2,402)



Trip 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.

To better understand the planning process, US travellers expressing some level of consideration in visiting each Atlantic province were subsequently asked which month(s) they would be most likely to visit, and how long they would expect their planning process to be.

- As may be expected, for all Atlantic Canadian destinations, the months of **June to September** hold the greatest appeal to US travellers.
- Regardless of which Atlantic province US travellers were interested in visiting, the planning cycle is generally expected to last several months. Depending on the Atlantic province they wish to visit, US travellers expect to spend between 4.5 and 4.9 months on average **planning and researching** their trip and would expect to **book** their trip between 3.5 and 3.9 months in advance. As such, the winter and early springtime appear to be a key time for research and booking activities for potential visitors to Atlantic Canada.
- Of note, for each Atlantic province, approximately one-half of US travellers note they would take between one and six months **planning and researching** their trip, while more than four in ten report that they would **book** their trip within a three-month window.
- Overall, the planning cycle is generally consistent across New England and Mid-Atlantic travellers. (Tables 26-28)



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				
January	7%	6%	6%	5%
February	5%	7%	5%	4%
March	7%	7%	7%	5%
April	10%	11%	9%	11%
May	16%	16%	15%	16%
June	25%	25%	27%	27%
July	26%	30%	30%	30%
August	24%	26%	27%	27%
September	19%	17%	20%	19%
October	11%	11%	13%	12%
November	4%	4%	5%	6%
December	4%	5%	6%	6%
Don't know at this time	18%	18%	17%	18%
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

[IF 'LIKELY TO CONSIDER TRAVEL TO ATLANTIC PROVINCE' IN Q.25] Q.26: Thinking about a future trip to [INSERT ALL RELEVANT ATLANTIC PROVINCES MENTIONED], during which month(s) would you likely take this trip? | Q.27: How many months in advance would you start planning/researching this trip? | Q.28: How many months in advance would you start booking this trip? Note: Responses of 'Don't know/Unsure' have been removed from the calculation of the mean score.



Information Sources

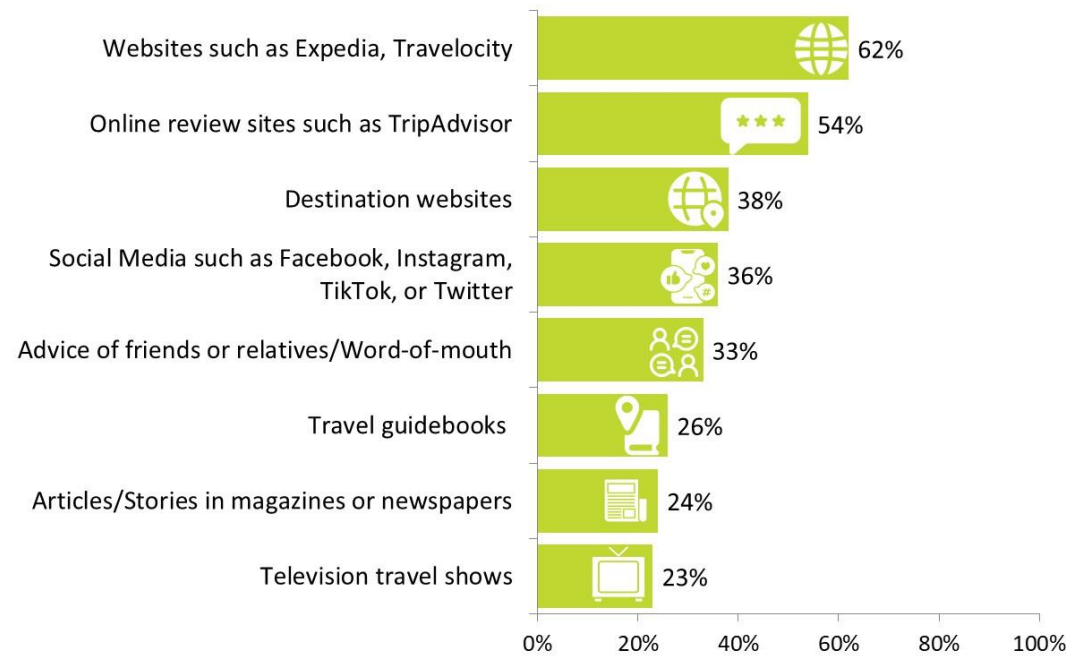
Travel related websites and review sites are key sources for information when considering an Atlantic Canada vacation.

Regardless of which Atlantic province they expressed interest in visiting, all potential visitors were asked to identify where they would look for information.

- Overall, a wide-range of information sources are considered, with online tools being fundamental sources. **Travel related websites** (e.g., Expedia, Travelocity) being mentioned most often (62%), followed by **online review sites** (e.g., TripAdvisor) (54%). At the same time, **destination websites** (38%), **social media** (e.g., Facebook, Instagram, TikTok, or Twitter) (36%) and **advice/word-of-mouth from friends/family** (33%) are each identified as information sources by at least one-third of potential travellers, while fewer indicate they would look for information in **travel guidebooks** (26%), **articles/stories in magazines/newspapers** (24%), and **television travel shows** (23%).
- Usage of the various information sources varies across regions and demographics. In particular, those living in New England are more likely than those living in Mid-Atlantic to report using AAA/CAA (22% vs. 12%). At the same time, usage of non-online information sources (i.e., **advice/word-of-mouth, travel guidebooks, AAA/CAA** and **official travel guides/brochures**) increases with age, while younger travellers are notably more likely to report using **social media** to look for information on an Atlantic Canadian province of interest (18-34: 49% vs. 35-54: 38% and 55-75: 14%). (Table 29)

Information Sources

Key Aided Mentions Among Those Likely to Consider Travel to Atlantic Provinces



Q.29: [IF 'LIKELY TO CONSIDER TRAVEL TO ATLANTIC PROVINCE' IN Q.25] Where would you look for information on [name provinces selected at Q.25]? (n=2,071)














Preferred Modes of Travel

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

To better understand modes of travel amongst potential US visitors, those who express likelihood of visiting at least one Atlantic province were asked which modes of travel they would likely take.

- Regardless of home region or province of interest, US travellers are most likely to express intention to travel to Atlantic Canada via **air**, distantly followed by **car**. Propensity to travel via **air** is highest amongst those living in Mid-Atlantic. At the same time, those living in New England are more likely than those living in Mid-Atlantic to indicate they would travel by car to Atlantic Canada.
- Those living in New England are more likely than those living in the Mid-Atlantic to express intention to travel to Atlantic Canada via **ferry**, particularly if travelling to Nova Scotia or PEI for vacation.
- Regardless of which Atlantic Canada province of interest, propensity to travel via **car** increases with age, while younger travellers are more likely to express intentions to travel via **air**. (Table 30)

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%

Q.30: [IF 'LIKELY TO CONSIDER TRAVEL TO ATLANTIC PROVINCE' IN Q.25] How would you likely travel from your home to [this/these] destination[s]?



Travel Agent/Tour Operator

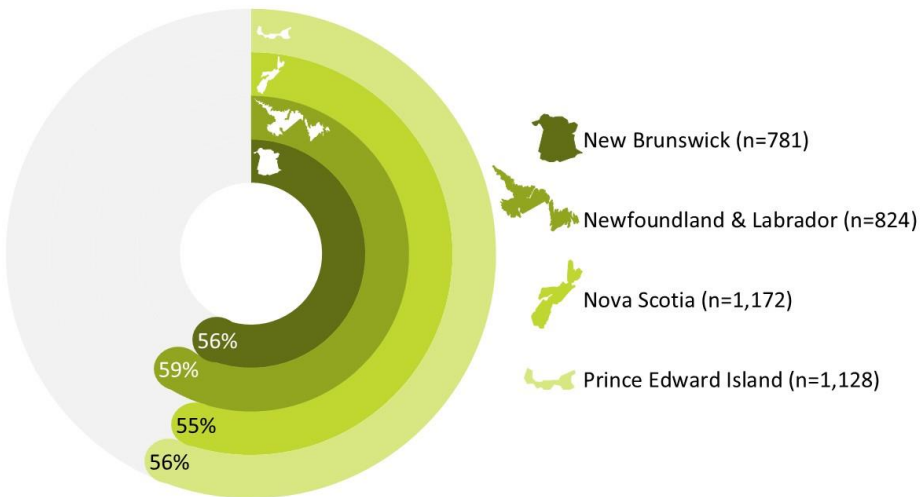
Regardless of which Atlantic province they intend to visit, the majority of potential US visitors would use a travel agent or tour operator to assist with their planning.

After being provided with a definition of the types of activities/supports performed by a travel agent/tour operator, potential visitors were asked if they would use such a service when planning a trip to the specific Atlantic province they would visit. Those who intended to use such a service were subsequently asked what specific services they would use.

- For all Atlantic provinces, more than one-half of potential US travellers indicated they would use a travel agent/tour operator. (Table 31)
- Overall, those who would use such services are looking for a range of services, with booking of *air transportation*, *recommendations for places to visit*, *booking of accommodations* and booking of a *complete package* being most common. (Table 32)

Use of Travel Agent/Tour Operator

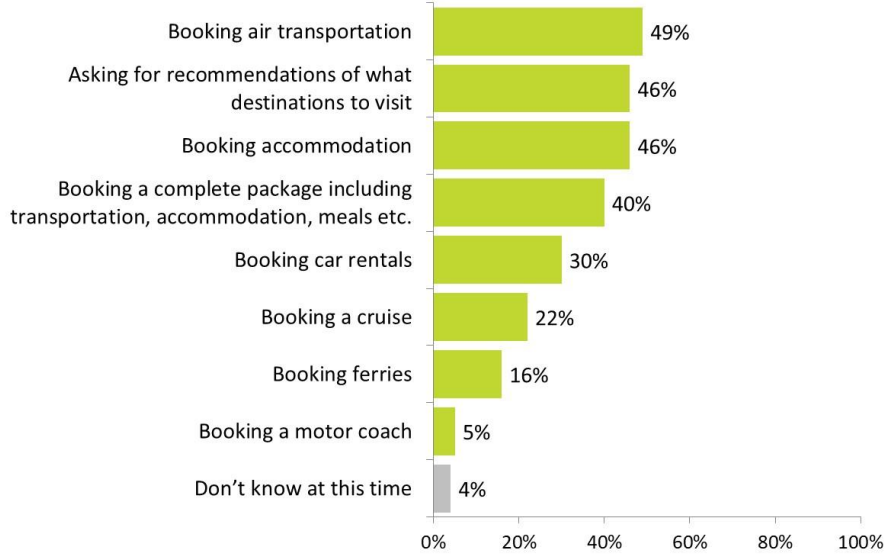
% 'Yes' Among Those Likely to Consider Visit to Atlantic Provinces



Q.31: [IF 'DEFINITELY/PROBABLY CONSIDER VISIT' IN Q25A-C, E] When thinking about planning a trip to [PROVINCE], would you use a travel agent/tour operator (this would exclude online travel booking websites such as Expedia). Note: A travel agent/tour operator assists individuals or groups in planning, organizing, and booking various aspects of their travel arrangements (e.g., booking flights, accommodations, ground transportation, excursions).

Travel Agent/Tour Operator Services Likely to Use

Total Aided Mentions Among Those Who Would Use Travel Agent/Tour Operator



Q.32: [IF 'YES' IN Q.31] What travel agent/tour operator services would you likely use to plan a trip to [this/these] destination[s]? (n=918)





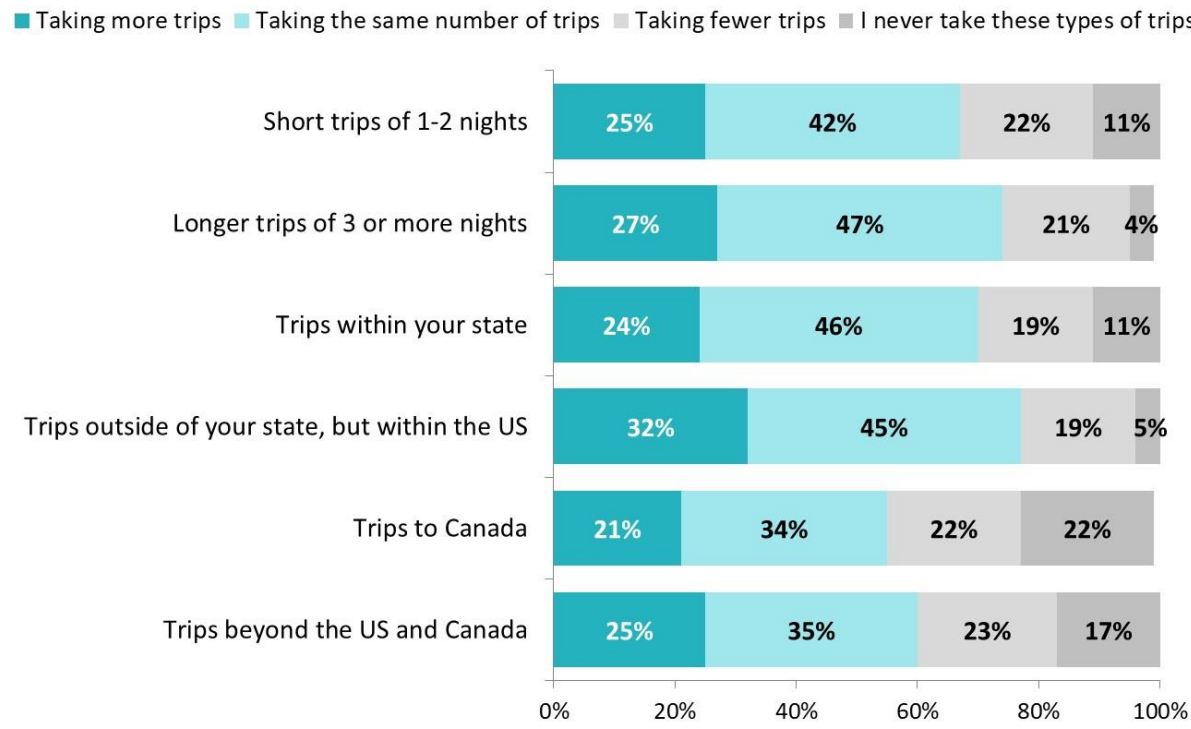
Future Travel Intentions

While the bulk of US travellers anticipate the number of vacation trips they take this year to be the same or higher than the previous year, results suggest the number of trips they take to Canada will remain relatively stable.

To better understand potential changes in travel behaviours, US travellers were asked how the nature of their travel may change this year compared to the previous year in terms of duration and choice of destination.

- With regards to duration, nearly one-half (47%) of US travellers expect to take the same number of **extended trips** (i.e., 3 or more nights), while slightly fewer (42%) expect to take the same number of **short trips** (i.e., 1–2 nights) in the coming year. At the same time, a notable minority anticipate the number of trips they take this year to be higher, with more than one-quarter (27%) considering taking more extended vacations this year, while a similar portion (25%) are considering more shorter duration trips.
- Overall, results suggest potential growth in US domestic travel, particularly as it relates to out-of-state domestic travel. While one-third (32%) anticipate taking more trips outside their home state but within the US, only two in ten (19%) anticipate taking fewer such trips.
- When it comes to international travel, US travellers are more conservative in their predictions, particularly when considering trips to Canada. While two in ten (21%) state they will take more trips to Canada this year, a similar portion (22%) indicate they will take fewer of these trips compared to last year.
- Note, expected travel changes to Canada are generally consistent across regions and demographics, with those with higher household incomes and higher education being more likely to anticipate taking more trips to Canada this year. (Table 33)

Future Travel Intentions



Q.33: For each of the following types of travel, are you considering taking more trips or fewer trips this year compared to last year? (n=2,402)





Ad Recall & Evaluation

The following section provides an overview of recall of tourism related advertising for various destinations, along with respondents' perceptions of the 2023 advertising campaign for each Atlantic province. For each province, one digital banner ad and one 30-second video was shown.

As the ads had different messaging and intent, results are not meant to be comparative, rather results are intended to provide direction in terms of how each ad was received and its impact on traveller perceptions. Note, provincial ads were shown and evaluated one at a time, with the presentation order rotated across surveys to minimize biases.

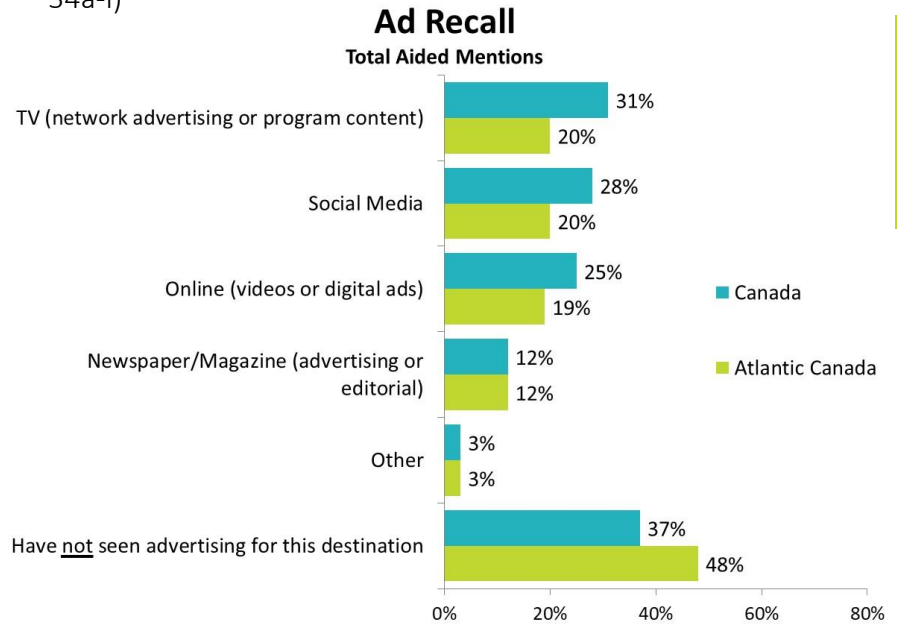
After reviewing the advertisements for each province, US travellers were subsequently asked to evaluate the campaign on various attributes.



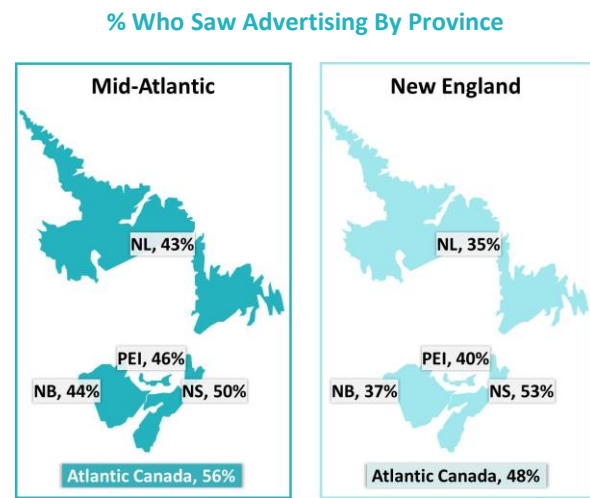
Overall Ad Recall By Destination

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

- Nearly two-thirds of US travellers have had recent advertising exposure related to Canadian tourism, while just over one-half report having seen tourism advertising specifically related to the Atlantic Canada region in general. Overall, US travellers most commonly report seeing Atlantic Canada advertising through a variety of mediums, with **TV, social media** and **general online advertising** being equal sources of exposure (20%, 20%, and 19%, respectively), followed by **newspaper/magazine ads**.
- When it comes advertising focused on the specific Atlantic provinces, recall is highest for **Nova Scotia** advertising. Across regions, those living in Mid-Atlantic are more likely than those living in New England to recall advertising specifically related to **New Brunswick, Newfoundland & Labrador**, and **Prince Edward Island**, while results are slightly more comparable for Nova Scotia. (Tables 34a-l)



Overall, ad recall for Atlantic Canada and each Atlantic Canadian province is strongest amongst younger US travellers. Younger travellers are also more likely to report exposure via social media and general online mediums.



Regions	Social media	TV	Online	Newspaper	Other	Have <u>not</u> seen advertising for this destination
Canada						
ON	21%	19%	18%	12%	3%	50%
NS	19%	20%	18%	12%	3%	49%
PEI	16%	15%	15%	11%	3%	57%
NB	15%	13%	15%	9%	3%	59%
NL	15%	13%	14%	9%	2%	61%
United States						
FL	34%	41%	29%	17%	4%	41%
ME	20%	25%	18%	12%	4%	43%
MA	20%	24%	18%	13%	5%	46%
NH	19%	20%	17%	11%	4%	49%
VT	18%	21%	17%	13%	5%	48%

Q.34a-b: Please think about travel advertising or promotions you may have seen on TV, the Internet, billboards, or in newspapers or magazines. During the past 12 months where do you recall having seen or heard advertising for any for the following destinations? (n=2,402)

Q.34c-l: Please think about travel advertising or promotions you may have seen on TV, the Internet, billboards, or in newspapers or magazines. During the past 12 months where do you recall having seen or heard advertising for any for the following destinations? (n=2,402)



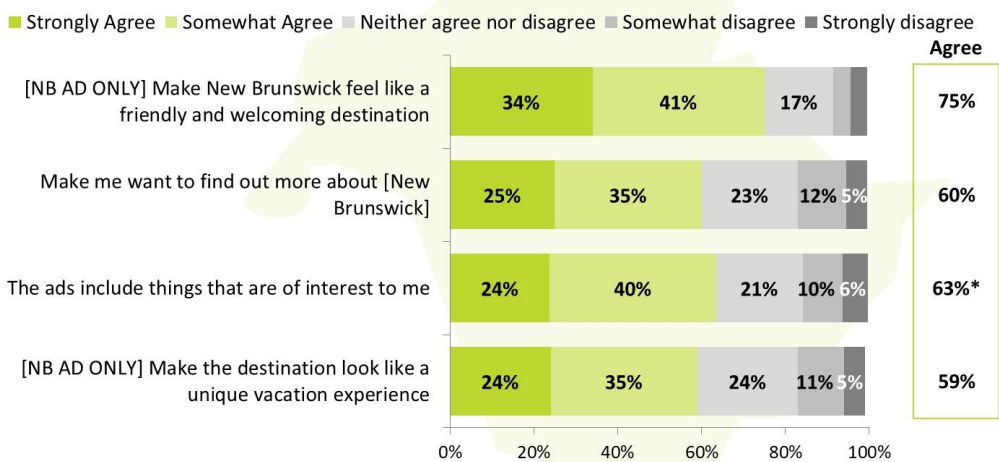
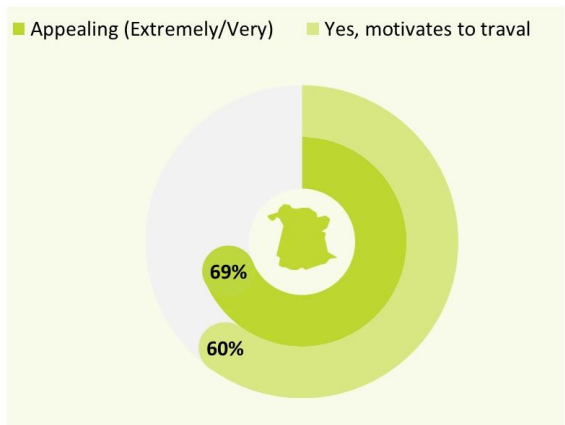


Ad Evaluation: New Brunswick

The NB ads are generally considered appealing and motivating, leaving the impression NB is a friendly and welcoming destination.

- Seven in ten (69%) US travellers considered the NB ads **appealing**, with one-quarter (26%) deeming them to be *extremely* appealing. Across regions, those living in New England are marginally more likely than those living in the Mid-Atlantic to find the NB ads appealing (71% vs. 67%).
- Six in ten (60%) US travellers felt these ads would **motivate them to travel to NB** in the future, with results consistent between US markets (New England: 60% and Mid-Atlantic: 59%).
- The NB campaign performed very well across presented attributes with three-quarters (75%) expressing some level of agreement that the ads make **NB feel like a friendly and welcoming destination**. At the same time, a clear majority felt the ads encouraged them **to find out more about NB, included things of interest to them**, and made the **destination look like a unique vacation experience**, with each statement receiving some level of agreement from at least six in ten US travellers. (Tables 35–37: NB)

New Brunswick Ad Evaluation



Q.35: Please indicate how appealing the ads make [NEW BRUNSWICK] as a place to visit on vacation. (n=2,402) Q.36: Do these ads motivate you to want to travel to [NEW BRUNSWICK] in the future? (n=2,402) | Q.37: To what extent do you agree or disagree with each of the following statements about the ads for [NEW BRUNSWICK]? (n=2,402) Note: Mentions of 4% or less are represented by a bar. *Due to rounding.



Across the attributes assessed, results were generally consistent across US markets, with those in New England being slightly more likely than Mid-Atlantic residents to agree the NB campaign included things of interest to them (66% vs. 60%).

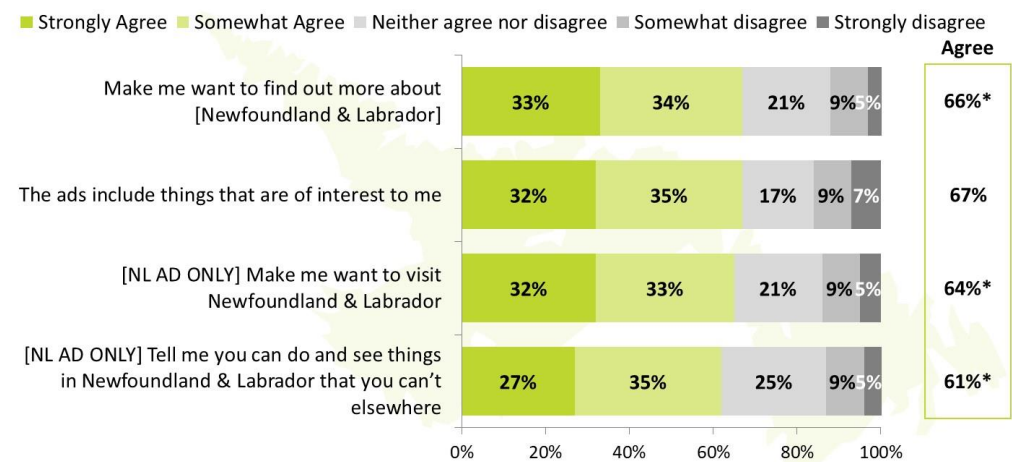
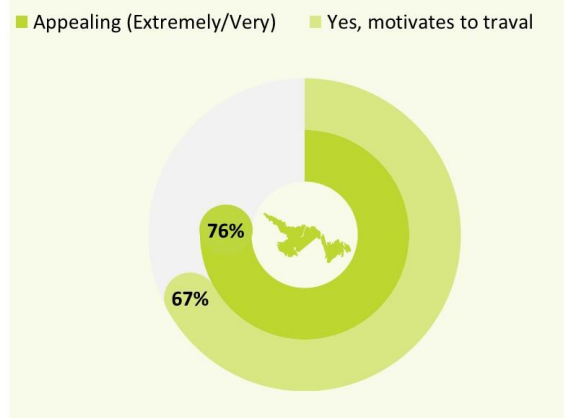


Ad Evaluation: Newfoundland & Labrador

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

- Three-quarters (76%) of US travellers found the NL ads to be **appealing**, with nearly four in ten (37%) considering them *extremely* appealing. The ads hold strong appeal across both markets, with results marginally higher among Mid-Atlantic travellers (78% vs. NE: 74%).
- Two-thirds (67%) of US travellers felt these ads would **motivate them to travel to NL** in the future, with those living in Mid-Atlantic being marginally more inclined to be motivated to visit (69% vs. NE: 65%).
- The NL campaign performed very well across presented attributes with two-thirds (66%) agreeing the ads make them **want to find out more about NL**, while similar portions agree the ads **include things of interest to them** (67%) or **makes them want to visit NL** (64%). Six in ten (61%) agree the ad tells them **you can do and see things in NL that you can't do elsewhere**. (Tables 35–37: NL)

Newfoundland & Labrador Ad Evaluation



Across assessed attributes results were generally consistent across US markets.

Q.35: Please indicate how appealing the ads make [NEWFOUNDLAND & LABRADOR] as a place to visit on vacation. (n=2,402) | Q.36: Do these ads motivate you to want to travel to [NEWFOUNDLAND & LABRADOR] in the future? (n=2,402) | Q.37: To what extent do you agree or disagree with each of the following statements about the ads for [NEWFOUNDLAND & LABRADOR]? (n=2,402) *Due to rounding.

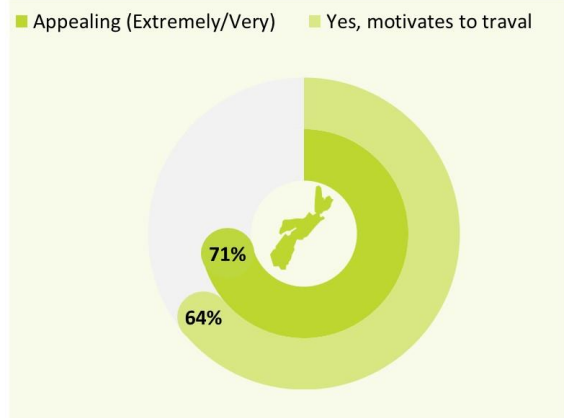




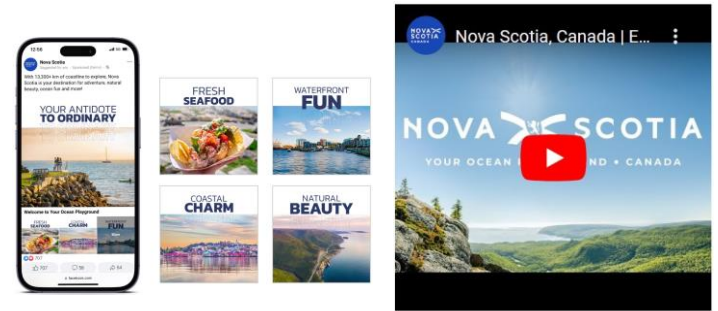
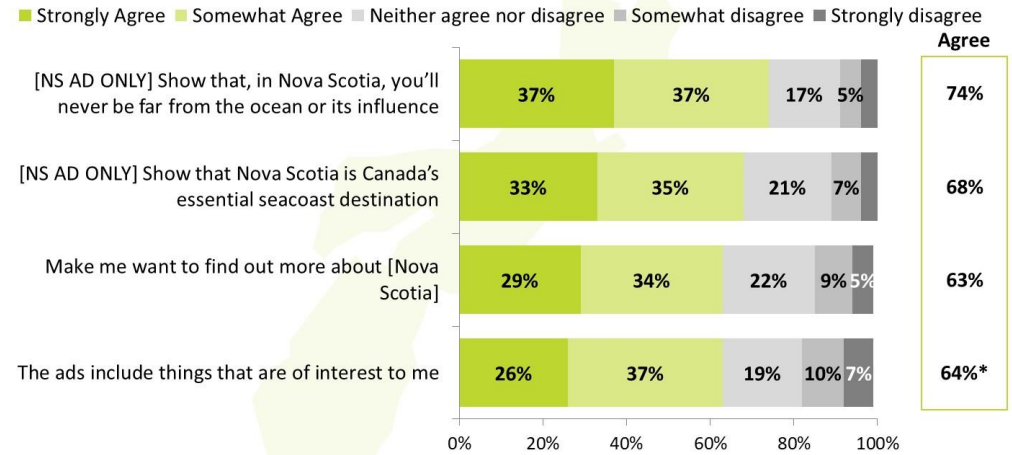
Ad Evaluation: Nova Scotia

The NS ads are largely considered appealing and motivating, showcasing the proximity of the ocean and NS' place as Canada's essential seacoast destination.

- Seven in ten (71%) US travellers found the NS ads to be **appealing**, with three in ten (29%) deeming them to be **extremely** appealing. Once again, across regions, those living in New England are marginally more likely than those living in the Mid-Atlantic to find the NS ads appealing (73% vs. 69%).
- Nearly two-thirds (64%) of US travellers felt these ads would **motivate them to travel to NS** in the future, with results consistent between US markets.
- The NS campaign performed very well across presented attributes with three-quarters (74%) expressing some level of agreement that the ads **show that, in NS, you'll never be far from the ocean or its influence** while slightly fewer (68%) agree the ads show that **NS is Canada's essential seacoast destination**. At the same time, nearly two-thirds (63%) agree the ads **make them want to find out more about NS**, while a similar portion agree the ads **include things that are of interest to them**. (Tables 35–37: NS)



Nova Scotia Ad Evaluation



Across the attributes assessed, those living in New England generally offer slightly more positive assessments compared to those living in the Mid-Atlantic. That said, the ads perform equally with regards to encouraging travellers to find out more about the province.

Q.35: Please indicate how appealing the ads make [NOVA SCOTIA] as a place to visit on vacation. (n=2,402) | Q.36: Do these ads motivate you to want to travel to [NOVA SCOTIA] in the future? (n=2,402) | Q.37: To what extent do you agree or disagree with each of the following statements about the ads for [NOVA SCOTIA]? (n=2,402) Note: Mentions of 4% or less are represented by a bar. *Due to rounding.



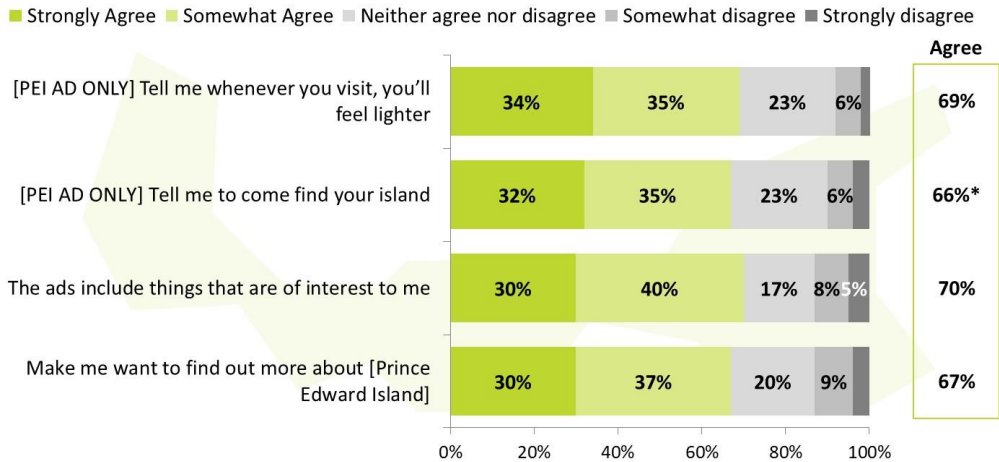
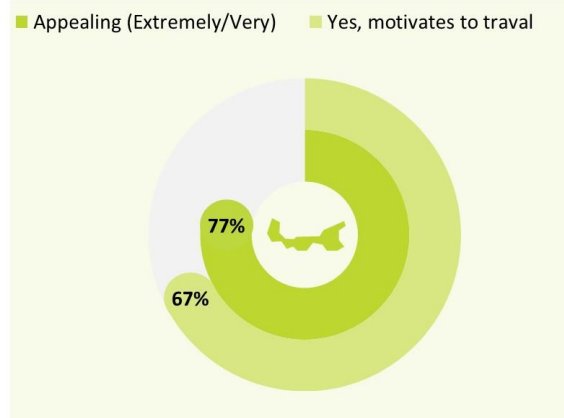


Ad Evaluation: Prince Edward Island

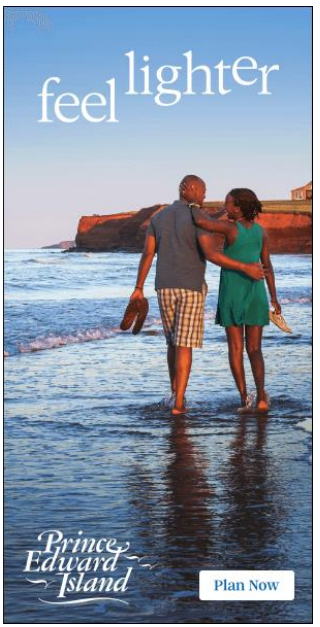
The PEI ads hold wide appeal and are considered motivating, and generally leaves the impression you'll feel lighter when visiting.

- More than three-quarters (77%) of US travellers found the PEI ads to be **appealing**, with one-third (34%) deeming them to be **extremely** appealing. At the same time, two-thirds (67%) felt these ads would **motivate them to travel to PEI** in the future. Of note, results on these two factors are consistent across both the Mid-Atlantic and New England markets.
- The PEI campaign performed very well across presented attributes with most agreeing the ads tell them that **whenever you visit, you'll feel lighter, tells viewers to come find your island, includes things of interest to them, and makes them want to find out more about PEI**. Indeed, at least two-thirds of US travellers offered some level of agreement on each of the statements. (Tables 35–37: PEI)

Prince Edward Island Ad Evaluation



Q.35: Please indicate how appealing the ads make [PRINCE EDWARD ISLAND] as a place to visit on vacation. (n=2,402) | Q.36: Do these ads motivate you to want to travel to [PRINCE EDWARD ISLAND] in the future? (n=2,402) | Q.37: To what extent do you agree or disagree with each of the following statements about the ads for [PRINCE EDWARD ISLAND]? (n=2,402) Note: Mentions of 4% or less are represented by a bar. *Due to rounding.



Across the attributes assessed, results were generally consistent across US markets.





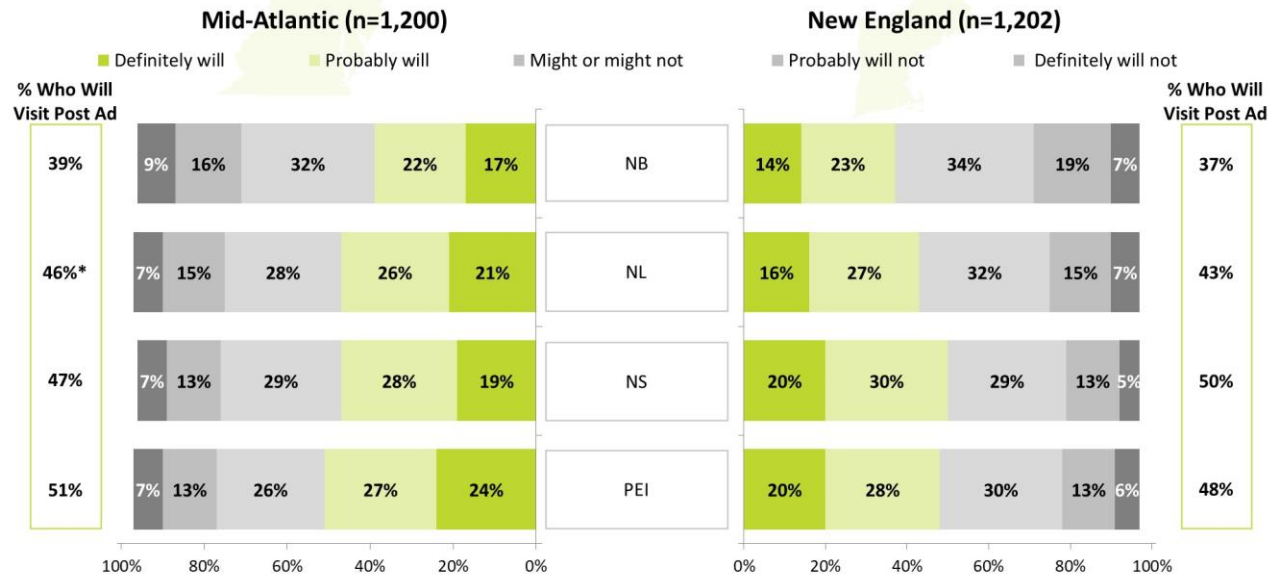
Likelihood to Consider Atlantic Canada After Seeing Ads

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

In order to gauge the potential impact these ads would have on influencing travellers' propensity to visit each Atlantic Canada province, after all ads were assessed, US travellers were once again asked their likelihood of taking a pleasure trip to each province in the next two years.

- Results show that the ads positively impact travellers' intentions of taking a pleasure trip to each Atlantic Canada province. Indeed, between more than one-third and one-half of US travellers indicate they *definitely* or *probably* will visit in the next two-years, with results generally consistent across the two markets.
- In both markets, those under 55 years of age, those with children living in the home, and those who have visited Atlantic Canada in the past are more likely than their respective counterparts to express some likelihood of taking a pleasure trip to each Atlantic Canada province. Moreover, men are more likely than women to indicate intention to take a trip to New Brunswick (43% vs. 35%) and Newfoundland and Labrador (49% vs. 41%). (Tables 38a-d)

Likelihood of Travelling to Each Province in the Next 2 Years After Seeing Ads



Q.38a-d: Now that you have seen ads for the regions' sights and activities, how likely are you to take a pleasure trip to the following destinations in the next 2 years or so? *Due to rounding.



Likelihood to Consider Atlantic Canada After Seeing Ads - *Continued*

Likelihood to visit at least one Atlantic Canada province went up slightly following ad exposure.

In order to further assess the impact exposure to the campaigns had on likelihood of travelling to the Atlantic Canada region over the next two years, the number of Atlantic Canada provinces travellers reported they would *definitely* or *probably* visit in the next two years was again calculated.

- Overall, results suggest that exposure to the campaigns had an incremental impact on travel intentions, with the proportion of travellers expressing some likelihood of visiting at least one Atlantic province over the next two years increasing from 63 percent to 68 percent. In addition, after seeing the ads for all four provinces, one-quarter (24%; up 5 points from pre-ad exposure) expressed some level of intention in visiting **all four** Atlantic Canada provinces.
- Interestingly, while residents of New England were slightly more likely than those living in the Mid-Atlantic to express likelihood to visit pre-ad exposure, after seeing all the ads, likelihood to visit at least one Atlantic Canada province in the near future was consistent across both regions (New England: 67% vs. Mid-Atlantic: 68%). (Table 38a-d combined)



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

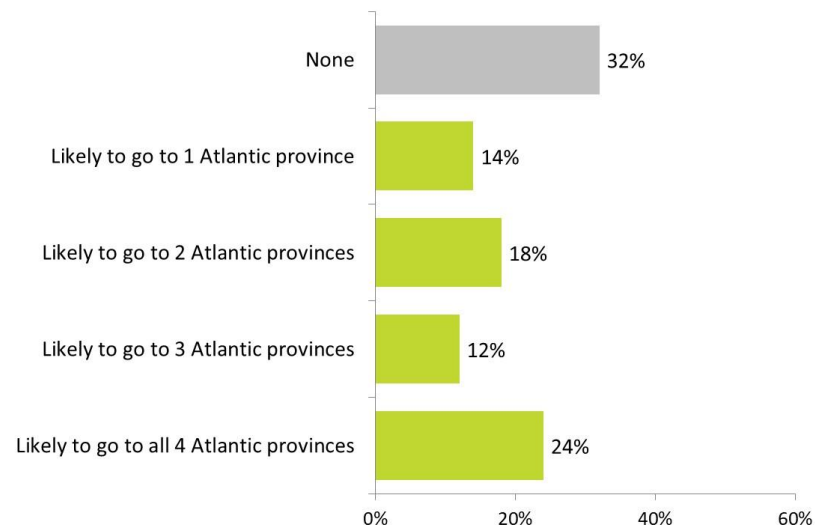


68%



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 Take a Pleasure Trip Post Ads



Q.38a-d [COMBINED]: Now that you have seen ads for the regions' sights and activities, how likely are you to take a pleasure trip to the following destinations in the next 2 years or so? New Brunswick, Newfoundland & Labrador, Nova Scotia, and Prince Edward Island. Number of Atlantic Provinces definitely or probably (n=2,402)



Motivating Factors to Visit: New Brunswick

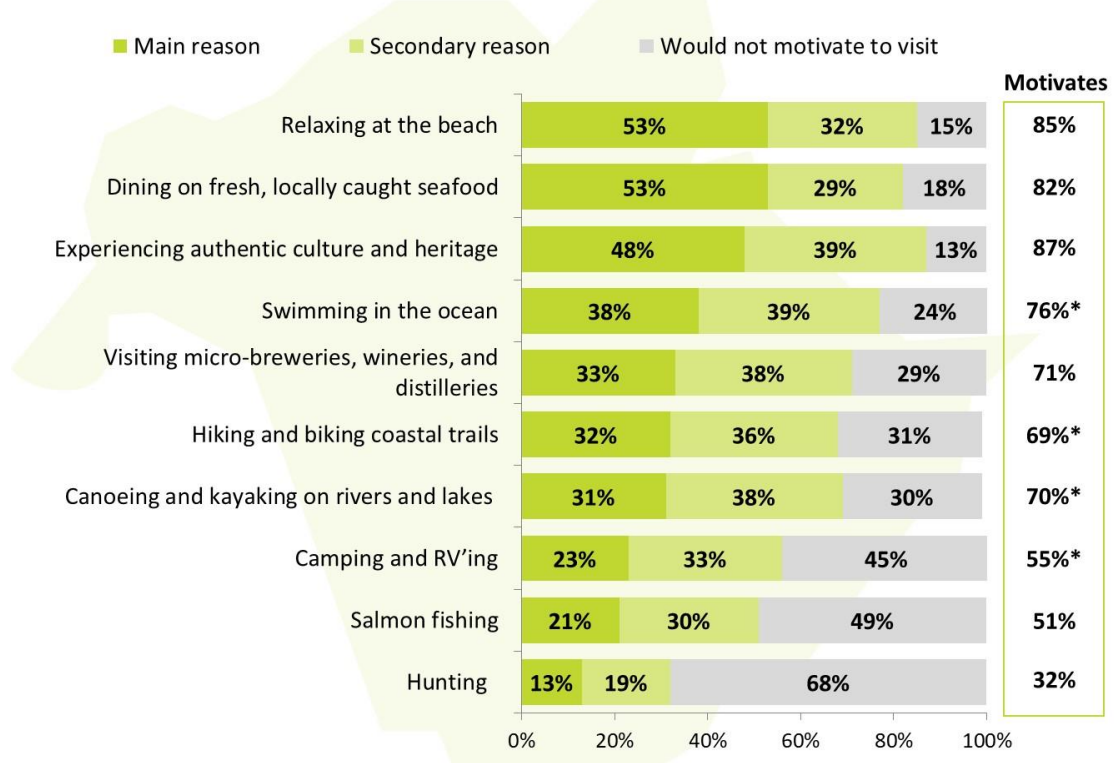
A wide-variety of factors are considered motivators for visiting Atlantic Canada.

Finally, after each provincial campaign was tested, US travellers were also asked whether specific attributes of each province would be a *main reason for them to visit*, a *secondary reason*, or would *not motivate them* to visit the province.

New Brunswick

- Overall, **relaxing at the beach** (53%) and **dining on fresh, locally caught seafood** (53%) hold the greatest draw for US travellers in visiting New Brunswick, with more than one-half considering these to be a *main reason* for visiting the province, while slightly fewer consider **experiencing authentic culture and heritage** (48%) as a main reason for visiting.
- Other factors considered to be *main reasons* for visiting New Brunswick mentioned by approximately one-third of US travellers or more include **swimming in the ocean** (38%), **visiting micro-breweries/wineries/distilleries** (33%), **hiking and biking coastal trails** (32%) and **canoeing and kayaking on rivers and lakes** (31%).
- Overall, factors motivating visitation are generally consistent across markets. Those living in the Mid-Atlantic are notably more likely than those living in New England to be motivated by **salmon fishing** (57% vs. 44%) and **hunting** (38% vs. 27%). At the same time, US travellers under the age of 55 and those with children living in the household are more likely to identify many of the factors assessed as being motivators for encouraging visitation to New Brunswick. (Tables 39a-j)

Motivating Factors to Visit NB



Q.39a-j: Below is a selection of things to see and do in New Brunswick. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,402) *Due to rounding.

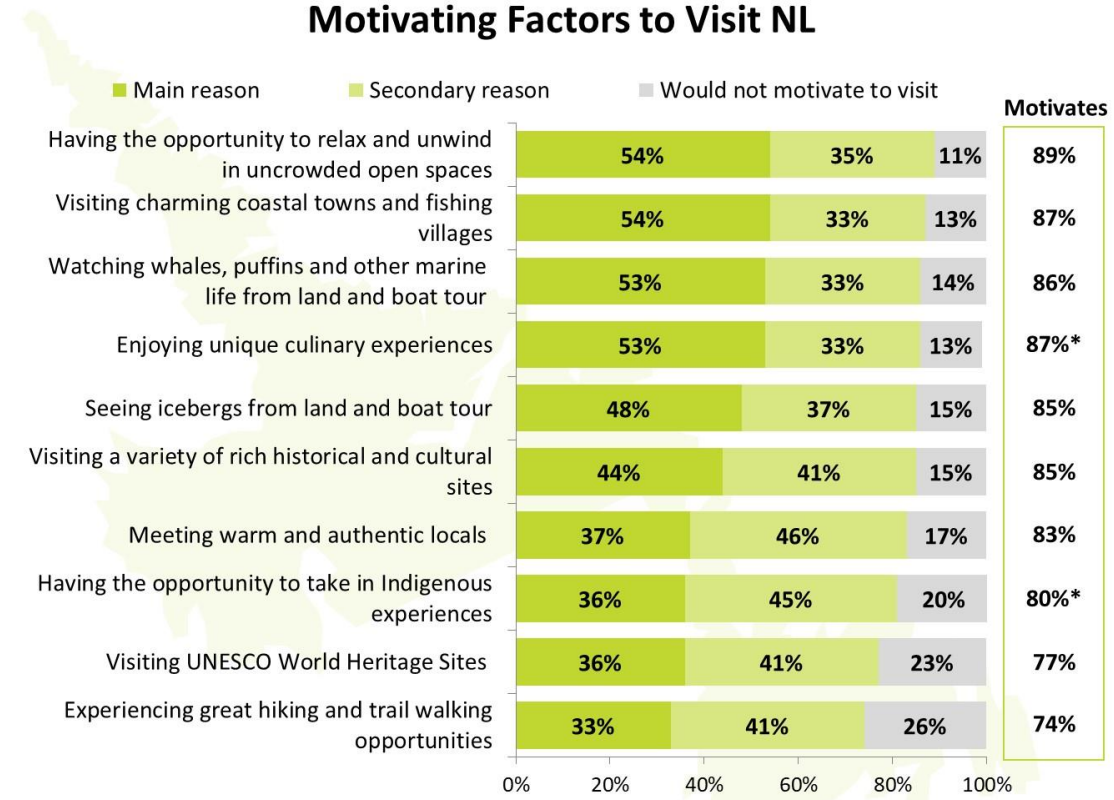


Motivating Factors to Visit: Newfoundland & Labrador

Newfoundland & Labrador

- *Having the opportunity to relax and unwind in uncrowded open spaces* (54%), *visiting charming coastal towns and fishing villages* (54%), *watching whales/puffins/marine life from land and boat tour* (53%), and *enjoying unique culinary experiences* (53%) hold the greatest draw for US travellers in visiting Newfoundland & Labrador, with more than one-half considering each of the factors to being *main reasons* for visiting the province. At the same time, all other factors assessed are considered main factors for visiting Newfoundland & Labrador by at least one-third of US travellers or more.
- Overall, factors motivating visitation are generally consistent across markets and demographics. Those under the age of 55 are more likely to consider *experiencing great hiking and trailing walking opportunities* (18-34: 81% and 35-54: 78% vs. 55-75: 58%) as a main or secondary factor to visit the province. Younger travellers are also slightly more likely to report being motivated by *having the opportunity to take in Indigenous experiences* (18-34: 83% and 35-54: 82% vs. 55-75: 74%). (Tables 40a-j)

Motivating Factors to Visit NL



Q.40a-j: Below is a selection of things to see and do in Newfoundland & Labrador. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,402) *Due to rounding.

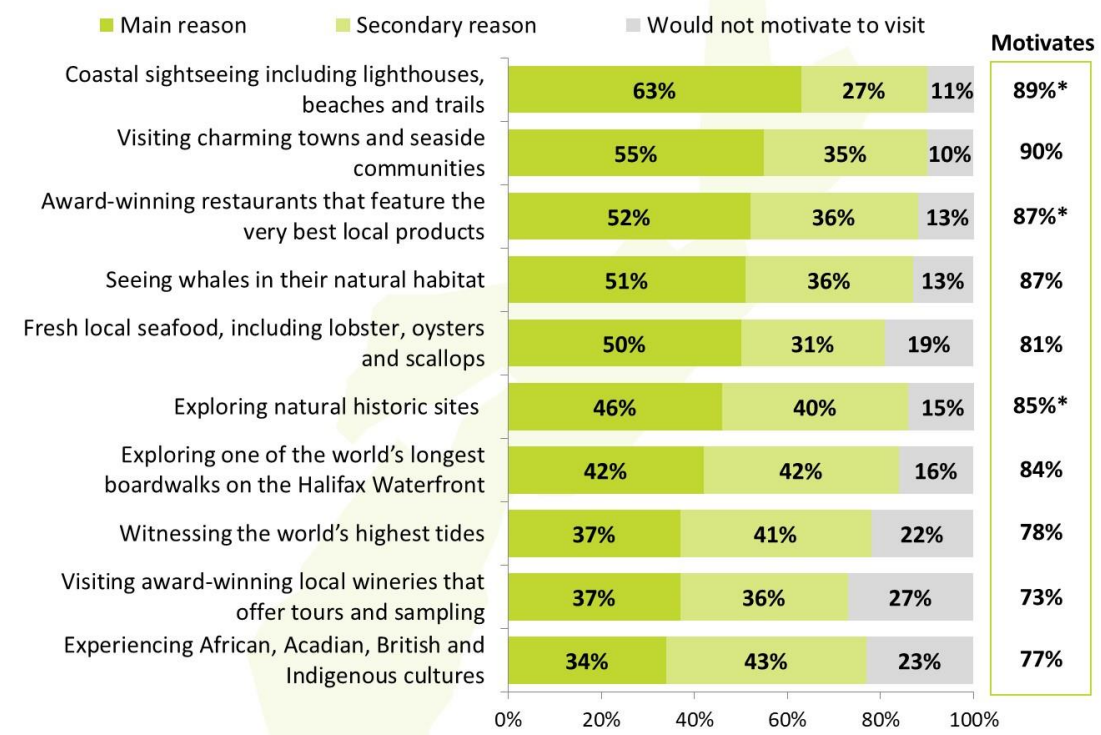


Motivating Factors to Visit: Nova Scotia

Nova Scotia

- Overall, *coastal sightseeing (including lighthouses, beaches and trails)* (63%), *visiting charming towns and seaside communities* (55%), *award-winning restaurants that feature the very best local products* (52%), *seeing whales in their natural habitat* (51%), and *fresh local seafood (including lobster, oysters and scallops)* (50%) are key drivers, with at least one-half of US travellers or more considering these to be a *main reason* for visiting the province. All other factors assessed are considered main factors for visiting Nova Scotia by at least one-third of US travellers or more.
- Overall, factors motivating visitation are generally consistent across markets and demographics, with minor variations noted. US travellers under the age of 55 are more likely than their older counterparts to consider *experiencing African, Acadian, British and Indigenous cultures* as a main or secondary reason for visiting Nova Scotia (18-34: 80% and 35-54: 81% vs. 55-75: 68%). (Tables 41a-j)

Motivating Factors to Visit NS



Q.41a-j: Below is a selection of things to see and do in Nova Scotia. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,402) *Due to rounding.

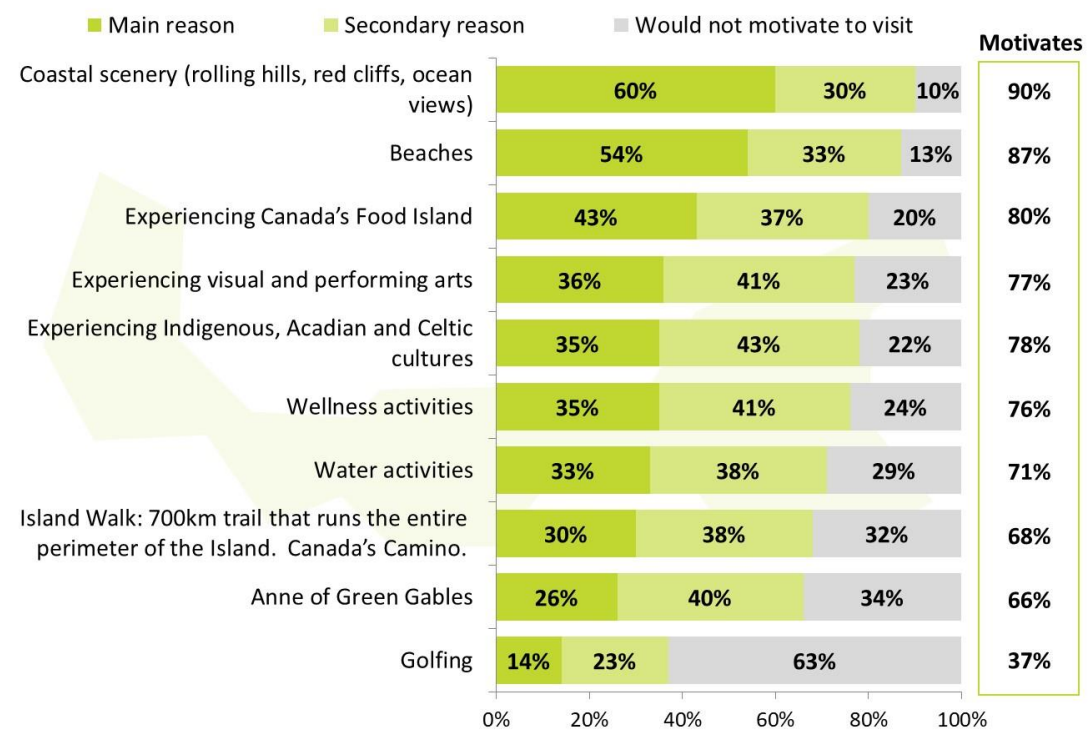


Motivating Factors to Visit: Prince Edward Island

Prince Edward Island

- *Coastal scenery (rolling hills, red cliffs, ocean views)* and *beaches* holds the greatest allure for US travellers visiting PEI, with more than one-half (60% and 54%, respectively) citing these to be a main motivator for visiting the Island.
- Other factors considered to be *main* reasons for visiting PEI mentioned by approximately one-third of US travellers or more include *experiencing Canada’s Food Island* (43%), *experiencing visual and performing arts* (36%), *experiencing Indigenous/Acadian/Celtic cultures* (35%), *wellness activities* (35%), and *water activities* (33%).
- Across markets, those living in the Mid-Atlantic are notably more likely than those living in New England to be motivated by *golfing* (43% vs. 31%). Motivating factors also vary somewhat across demographics. In particular, those under the age of 55 and those with children living in the household are more likely to identify many of the factors assessed as being motivators for encouraging visitation to PEI. Further, as may be expected, men and those with higher annual household incomes are more likely than their respective counterparts to identify golfing as a factor that would encourage them to visit the Island. (Tables 42a-j)

Motivating Factors to Visit PEI



Q.42a-j: Below is a selection of things to see and do in Prince Edward Island. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,402)



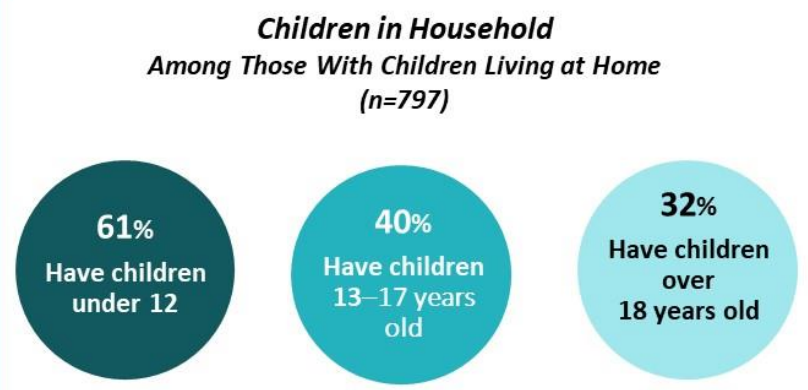
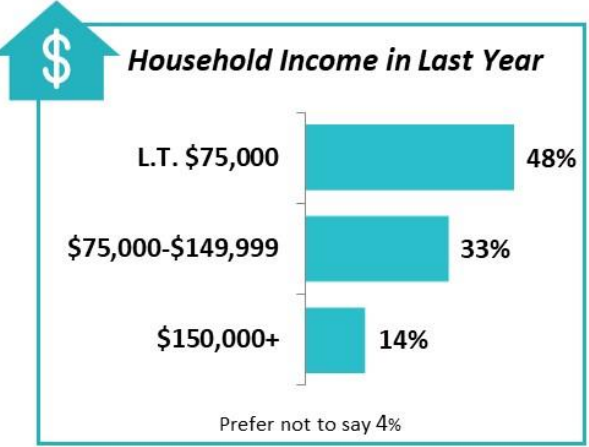
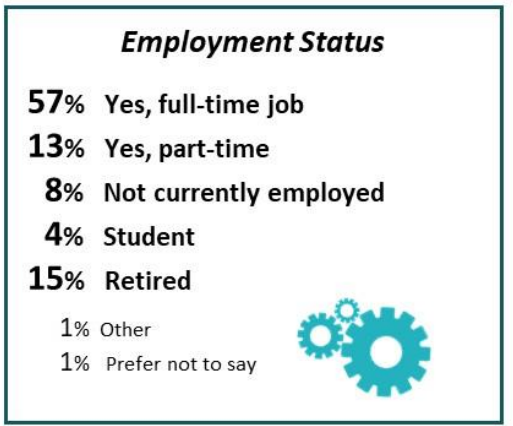
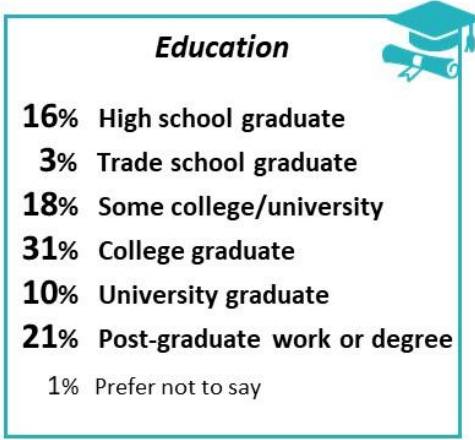
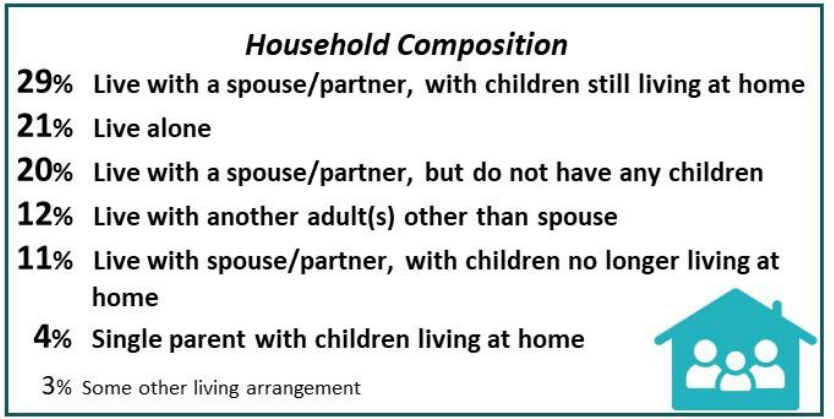
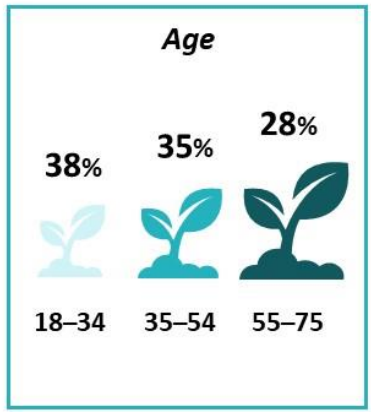
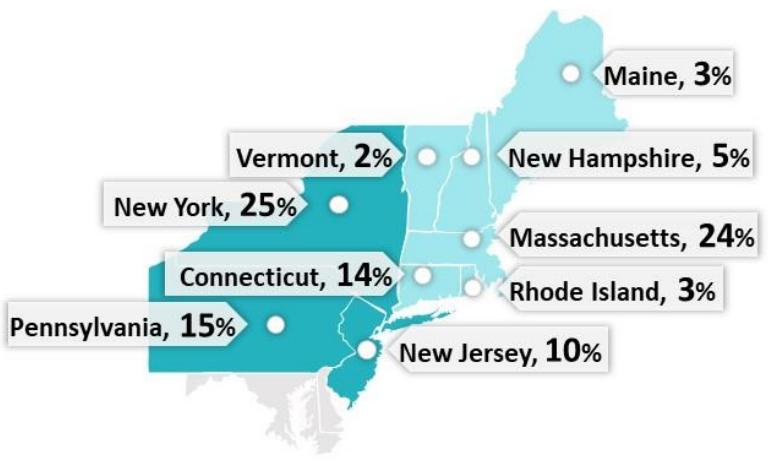
Respondent Profile

The following outlines the demographic and regional breakdown of respondents.



Respondent Profile

The following provides a profile of survey respondents (n=2,402).



every insight tells a story.

