

United Kingdom Consumer Research



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Context: Summary Report

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Research Objectives & Methodology

Research Objectives

The purpose of the study was to assist the ACTP in developing a communication strategy for the U.K. Market.

Methodology

The project involved a comprehensive review of existing data on the U.K. Market, followed by a quantitative survey among long haul travelers in the U. K.

The survey was nationwide, conducted during October, 2009, and among a cross section of individuals age 18+ who took a leisure trip between May and October of 4 nights or more outside of Western Europe during the past 3 years .

The sample size was n=1,000. The survey was conducted via a nationwide, representative online panel.

Key Findings

Situation Analysis

Awareness of “Atlantic Canada” is low with only 15% of U.K. long haul travelers having heard of the destination.

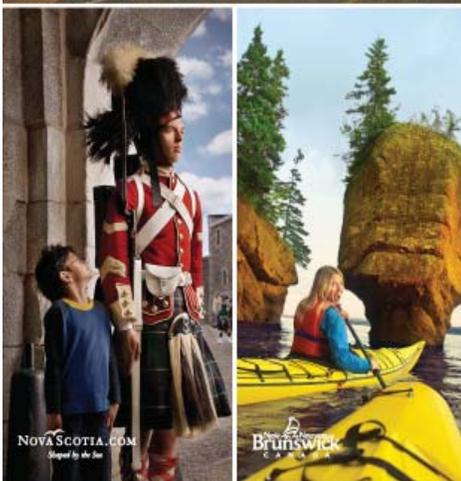
For Canada destined travelers, Atlantic Canada is rarely a stand-alone destination—typically it is only one component of a more extensive trip that includes Central Canada.

For the majority who are unfamiliar with the region, expecta-

tions of Atlantic Canada is that it will be not too dissimilar from Southwest England or Scotland. Hence, current interest in the region as a travel destination is low.

The Opportunity

After exposure to a series of images and descriptions to familiarize prospective travelers with the region, interest in Atlantic Canada jumped sharply --21% of close to 15 million long haul



travelers claimed they would be very interested in visiting Atlantic Canada in the near future.

Given that the current visit level is only in the 65,000 range, this implies that there is more than enough latent demand to make the U.K. a very serious market opportunity.

With such a high potential demand, the industry should focus on marketing the type of product that would appeal to the majority of the market.

Recommendations

Develop The Right Product

The majority want to travel on a package,. Developing and promoting the right type of package is the first step. This will involve working closely with tour operators.

Hotel and resort operators, as well as attractions, need to integrate themselves into these U.K. market packages.

Direct promotion on their own by individual operators would be far less impactful because the U.K. traveler is unfamiliar with the area, and needs the sense of organization that a complete holiday package can provide.

The ideal package design:

- One and two week packages
- Fly Drive
- June to September
- Tells a story about a broader range of experiences beyond coastal scenery, too heavily focused on in existing packages.
- Build in wildlife viewing (e.g. whales, moose), warm beaches, quaint seaside towns, culture, socializing and seafood dining--all of which are of great interest, as the top 10 images (next page) reveal .
- Limited to the region, using Halifax, St John's and Fredericton as gateways and departure points.

The British are very open to accommodation beyond traditional hotels/motels—including cottages, cabins, B&B's, authentic lighthouses, country inns, etc.

They are also highly social people and would enjoy "having a pint" in the company of locals. Hence, the people side of an Atlantic Canada visit is important to project.

Positioning Atlantic Canada

Atlantic Canada should be positioned as a true nugget, a unique region of Canada so easily reached from the U.K.

Beyond dramatic scenery, whale watching, broad sandy beaches and World Heritage Sites, immerse your self in a unique culture , socialize with friendly, hospitable people, enjoy their incredible seafood, music, and culture and quaint towns.

The key is to communicate that their one or two week holiday will be filled with a full spectrum of sights, activities, stimuli and lasting memories.

Always communicate Atlantic Canada with a map. Only 15% know what and where it is.

The British are always on the lookout for deals, so promoting package and air deals is important.

Communication Channels

- The best channels are co-op programs with tour operators who are prepared to promote the region to their clientele.
- Partner with the CTC programs to reach prospects tuning in to Canada advertising and promotion.
- Partner with air carriers prepared to promote the route, especially with packages.
- Take the Atlantic Canada culture to the U.K. -- creating programs at the grass roots community level--pub promotions, participating in local cultural/music festivals, etc. The key is to give them an opportunity to appreciate the warmth and uniqueness of Atlantic Canadians and their lifestyle.

- Create an interactive Facebook web page. This can be interactive with, for example, past visitors providing testimonials.
- Online ads linked into general travel websites or travel browsers on general search engines.

Top Ten Images That Appeal to U.K. Travelers

	81%	Some of the finest whale watching in the world is in Atlantic Canada.
	81%	The spectacular beauty of Gros Morne National Park, a UNESCO World Heritage Site is awe inspiring. Experience a glacier-carved fjord at Western Brook Pond.
	74%	The changing colours are spectacular in autumn.
	72%	Broad sandy beaches with warm water swimming.
	72%	Fundy National Park is a UNESCO Biosphere Reserve. It has the world's highest tides. Walk on the ocean floor at Hopewell Rocks and kayak in the very same spot just six hours later.
	71%	The Cabot Trail is one of the world's most scenic drives.
	66%	The quaint seaside towns and villages are unique and colourful.
	66%	A stone's throw from nature are galleries, museums and nightlife.
	66%	Lunenburg is a UNESCO World Heritage Site. Its colourful waterfront, narrow streets and captivating architecture radiate the flavour of the town's seafaring past.
	64%	Enjoy succulent, fresh seafood in a unique coastal setting.