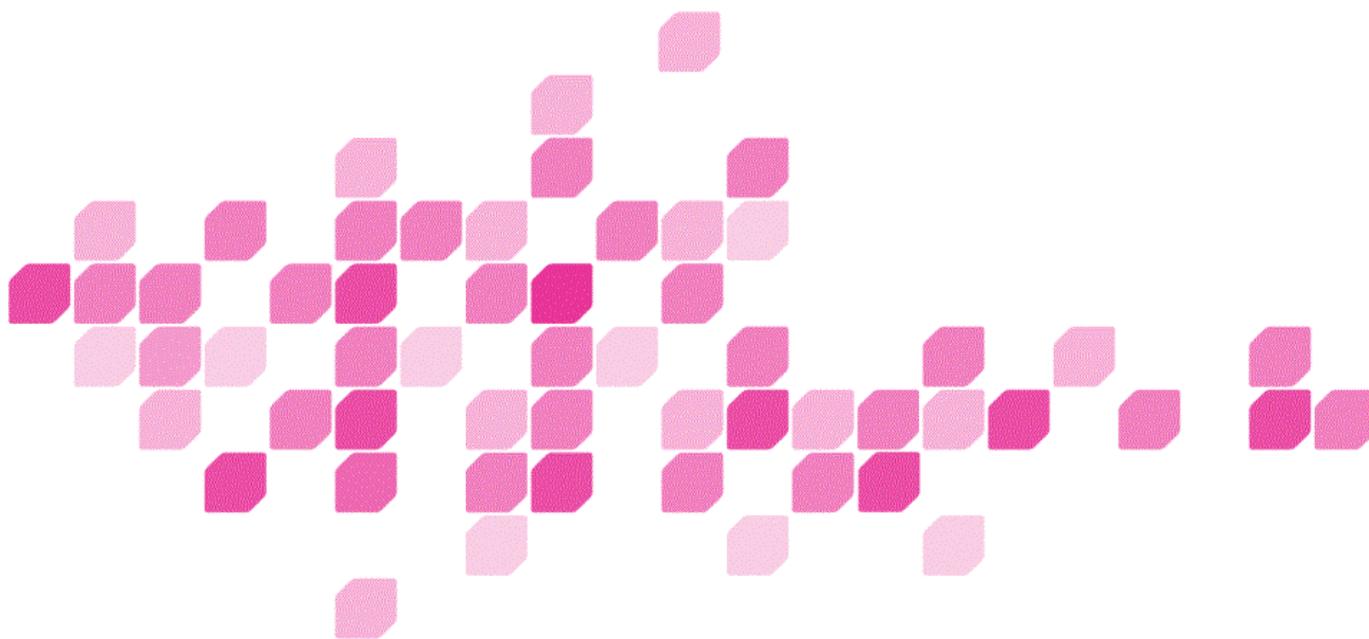


# US Consumer Research (2011)

*Summary Report*

Date: September 2011  
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*Presented to • Présenté à*  
Atlantic Canada Tourism Partnership  
(ACTP)



# Contents

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At TNS, we know that being successful in today's dynamic global environment requires more understanding, clearer direction and greater certainty than ever before. While accurate information is the foundation of our business, we focus our expertise, services and resources to give you greater insight into your customers' behavior and needs.

Our integrated, consultative approach reveals answers beyond the obvious, so you understand what is happening today – and what will happen tomorrow. That is what sets TNS apart.

Thank you for allowing us to explore your business needs. We hope you will continue to trust TNS to provide the insight you need to sharpen your competitive edge.

- 1.0 ..... Background and Methodology**
- 2.0 Key Findings..... 3**
  - 2.1 Pleasure Travel Patterns..... 3
  - 2.2 How Vacation Destinations are Chosen ..... 3
  - 2.3 Awareness and Interest in the Atlantic Provinces..... 4
  - 2.4 Perceptions of the Atlantic Provinces ..... 4
  - 2.5 Potential Market for the Atlantic Provinces . 4
  - 2.6 Trip Planning..... 6
  - 2.7 Advertising Recall And Imagery Assessment 6
- 3.0 Conclusions and Implications ..... 7**

# 1.0 Background and Methodology

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The following summary highlights the key findings from a research study undertaken for the Atlantic Canada Tourism Partnership (ACTP) in 2011 by TNS Canada. ACTP wanted to learn more about the characteristics of out-of-state travellers residing in the Mid Atlantic (New York, New Jersey, and Pennsylvania) and New England states (Maine, Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont), with a focus exclusively on three 'high potential' Prizm lifestyle segments. These three segments were the target of the direct-to-consumer campaign which aimed to raise the profile of the four Atlantic Canada provinces in these markets.

The research program was designed to:

- Profile current travel behaviour and future travel intentions; destinations visited and planned to visit; sources of information used in travel planning; travel purchase process; inspirations, motivations and activities that motivate travel among the three targeted Prizm segments;
- Determine awareness (unaided and aided) of each of the four Atlantic Canadian provinces;
- Measure interest in, and likelihood of visiting each province, and to size the market potential;
- Investigate perceived barriers and deterrents to visiting the Atlantic Provinces; and,
- Evaluate current positioning of the region in terms of destination appeal and imagery associated with the four Atlantic Provinces.

Data were collected online:

- 1,009 interviews among Mid Atlantic and New England pleasure travellers falling into the three Prizm segments (Exurban Explorers, Outdoorsy Elite, and Young Sophisticates) sourced from TNS' *Travels America* study database.
- Fieldwork was conducted between May 5-16, 2011.
- Qualifiers: had to have taken an out-of-state pleasure trip of 3+ nights in the summer months (between the May – October) within the past two years.
- Prior to tabulation, data were weighted to their correct geographic and demographic proportions within the sampled markets.

## 2.0 Key Findings

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The following section highlights the key findings of the research.

### 2.1 Pleasure Travel Patterns

- Travel within the United States dominates, with nine in ten respondents reporting a domestic out-of-state trip in the past 2 years. Florida is the most popular destination for travellers in both regions. Intra-regional travel is also popular with New York State, Pennsylvania, and Massachusetts emerging as top destinations.
- Canada was the 4<sup>th</sup> most visited country overall, visited by 12% of the target group in the past two years. Ontario attracted almost one-half of Mid Atlantic and New England visitors to Canada, while roughly one-third visited Quebec, and 17% going to Nova Scotia.

#### Top Destinations – Past 2 Years

Mid Atlantic and New England Travellers (n=1,009)
United States 87%
Europe 14%
Caribbean 13%
Canada 12%
Mexico 6%

### 2.2 How Vacation Destinations are Chosen

- When choosing a vacation destination, respondents cited relaxation opportunities as the most important determinant in the destination selection process. Beautiful scenery, a welcoming and friendly atmosphere, good value for money, great weather, and good restaurants were also found to be important criteria.
- The top benefits these travellers seek from vacations include: the chance to see and do new things; freedom to do what they want, when they want; relaxation and getting rid of stress; escaping from ordinary routine; and renewing mind, body, and soul.
- Top activities on previous pleasure trips include dining, shopping, visiting historic sites, seeing urban architecture, and engaging in beach and water activities.

## 2.3 Awareness and Interest in the Atlantic Provinces

- Two-thirds of Mid Atlantic and New England travellers are aware of at least one Atlantic province. There is almost universal awareness of Nova Scotia (84% awareness) with nearly three-quarters being aware of Prince Edward Island. Awareness of Newfoundland and Labrador (70% aware) and New Brunswick (68%) lags slightly.

## 2.4 Perceptions of the Atlantic Provinces

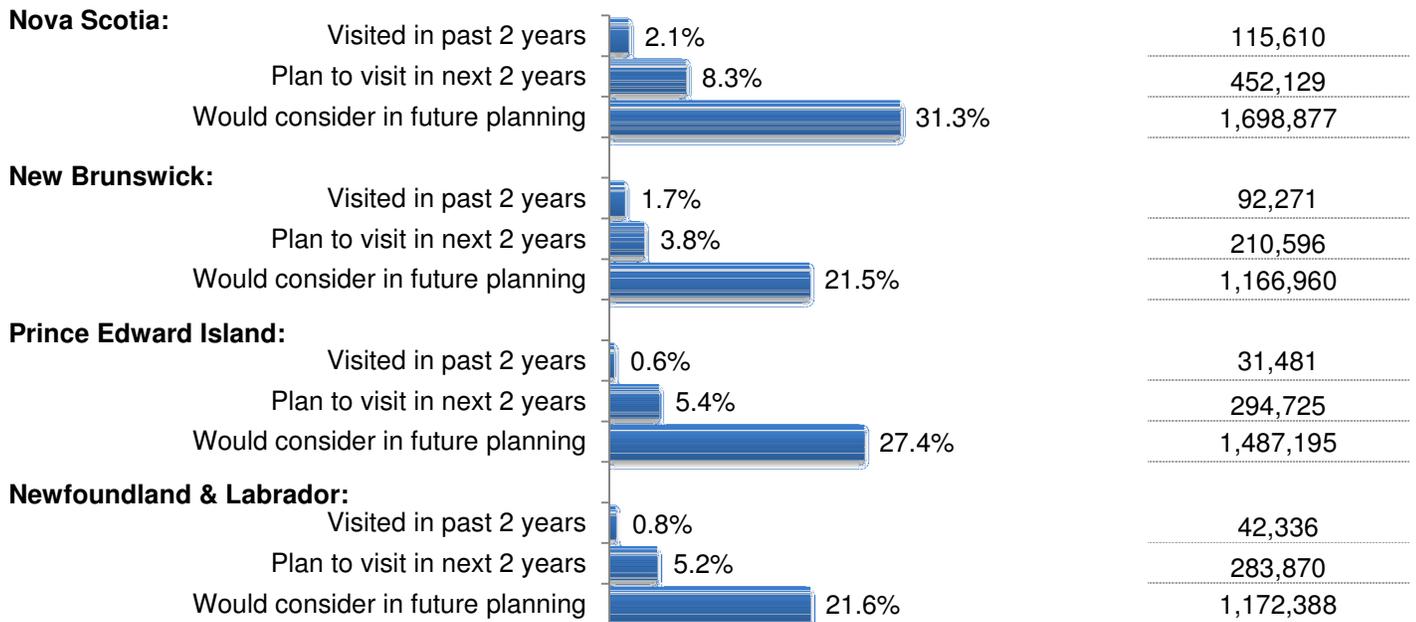
- Respondents were asked to assess the New England States as a whole, and individual Atlantic Provinces they were aware of, on a number of tourism attributes. New England outperformed the individual provinces on the majority of attributes, underscoring the region's competitive strength. The most pronounced gaps are evident for outstanding seafood, ease of vacationing / driving distance, family experiences, urban experiences, and warm saltwater beaches (on which no destination scored well).
- Nova Scotia is the highest performing province, beating New England for unique culture, natural wonders, and friendly people. Prince Edward Island also narrowly outperformed New England on unique culture and friendly people.

## 2.5 Potential Market for the Atlantic Provinces

- Future travel intentions appear to mimic past behavior with 79% of Mid Atlantic and New England travellers saying they will travel domestically in the next two years. Canada is in 3<sup>rd</sup> spot behind the Caribbean.
- 13% of Mid Atlantic and New England travellers are contemplating a trip to Canada in the next two years. Among those considering Canada, there is a strong tendency to visit Central Canada (Ontario and Quebec). Nova Scotia is the top future destination in Atlantic Canada. While past visitation to Prince Edward Island and Newfoundland and Labrador is low, there is considerable interest in future trips, resulting in these two provinces topping the Momentum Index which is used to measure future intent relative to past visitation.
- Using past visitation figures and future intention to visit, it is possible to estimate the potential market for each Atlantic provinces in the Mid Atlantic and New England markets. Nova Scotia emerges as the province most likely to see the greatest number of visitors from both markets, followed by Prince Edward Island.

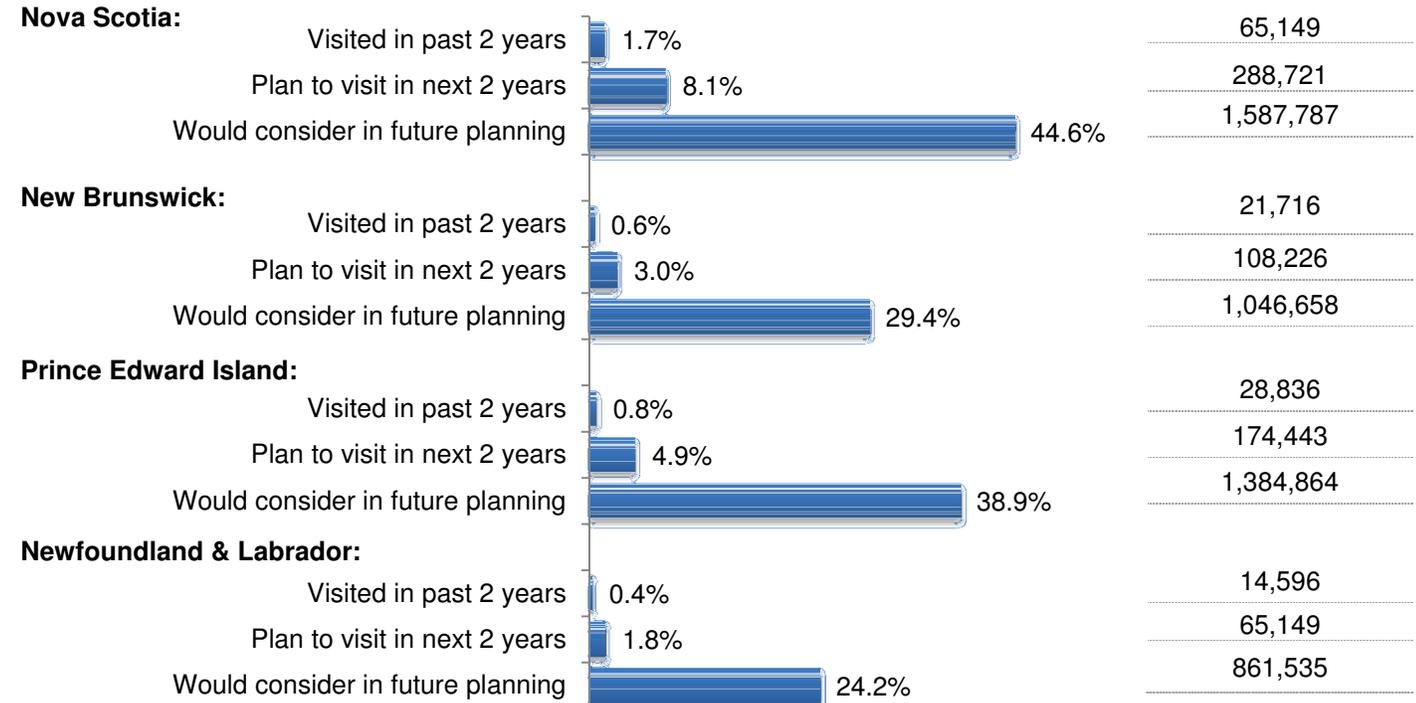
**Sizing The Market - Mid Atlantic States**

Among 3 Target Prizm Segments (29% of Region's Population)



**Sizing The Market - New England States**

Among 3 Target Prizm Segments (47% of Region's Population)



\*\* From US Census figures, Prizm data, and survey qualification incidence data.

## 2.6 Trip Planning

- Mid Atlantic and New England travellers considering a trip to an Atlantic Canada destination will use the Internet to both look for information and to plan the trip. A variety of websites are typically used in the trip planning process, with approximately one-third of travellers also relying on user-generated review sites for information.
- More than two-thirds of Mid Atlantic and New England travellers considering a trip to Atlantic Canada would drive, explaining why close to half would seek information from auto clubs.
- Few travellers would consult a travel agent to plan or book any part of a trip to Atlantic Canada.
- The planning cycle for regional trips is short, with most travellers planning and travelling within the summer months.
- Passport ownership among the target market is high, so this does not pose an impediment to visitation.

## 2.7 Advertising Recall And Imagery Assessment

- Respondents were asked to assess photos and sample advertisements for individual provinces to guide future advertising efforts.
- The eight most appealing images are:
  - Rissers – Nova Scotia
  - Cape St Mary's – Newfoundland and Labrador
  - Brigus White House – Newfoundland and Labrador
  - Rocks Elephant – New Brunswick
  - Couple on Beach – Prince Edward Island
  - Lunenburg Harbour Fall – Nova Scotia
  - Clambake – Prince Edward Island
  - Hopewell Rocks High – New Brunswick
- Top ranking images feature attractive scenery and invite participation, while not being perceived as too extreme or isolated. They are also seen as casual, surprising, genuine, fun, exotic, and intriguing.
- The implication is that dramatic and differentiating images are crucial to attracting travellers' attention and positioning the Atlantic Provinces as distinctive destinations, yet able to meet core travellers' needs. Conveying authenticity and accessibility are also key success factors for imagery.
- Mid Atlantic and New England travellers also evaluated sample provincial advertisements. Assessments were generally positive, although some attempts at humour did not resonate. Respondents appreciated ads depicting food and culinary experiences, unique geography, beach scenes, and family activities. Newfoundland and Labrador's ads were the strongest performers, successfully incorporating dramatic yet serene imagery coupled with compelling text.

## 3.0 Conclusions and Implications

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The potential of the Mid Atlantic and New England markets is considerable; yet the Atlantic Provinces face considerable challenges to capitalize on this opportunity.

The following section identifies next steps for building the market-share of the Atlantic Provinces in these markets.

- Differentiate the offer:
  - In the face of strong regional competition, particularly from the New England States, stress that the Atlantic Provinces offer something different, uniquely Canadian, and authentic.
  - Build on the perceived strengths of the Atlantic Canadian product identified through this research: unique culture, natural wonders, and hospitable people.
  - Mediate or counter the perceived 'hassles' of visiting Canada such as longer driving distances (relative to New England destinations) and passport requirements.
- Capitalize on alignment between the Atlantic Provinces' offerings and the benefits these travellers are seeking from vacations, namely:
  - New and different experiences.
  - Escape and freedom.
  - Stress relief and spiritual renewal.
- Key Activities to highlight:
  - Soft adventure activities that demonstrate serenity and relaxed enjoyment.
  - Each province's unique culture and history.
  - Don't forget the universal appeal of shopping and dining (not as central themes, but as hygienic 'cost of entry' factors providing secondary support).
- Imagery and messaging:
  - Use images that appeal by depicting an alluring and distinctive natural environment as well as cultural distinctiveness, while encompassing attributes travellers appreciate e.g., casual, genuine, and exotic.
  - Ad copy should be inspiring, but brief and to the point.
  - Limit use of quirky images and attempts at humour.
- Focus on the segments where the greatest potential lies: the ExUrban Explorers (64% of those intending to visit an Atlantic Canada destination fall into this segment):
  - Older (55+ years), have moderate to high incomes, are more likely to be retired, tend to be well educated and married, but without children in the home.
  - Heavily concentrated in Massachusetts and Connecticut.
  - Heavy consumers of traditional media, but light Internet users. Integrating traditional and online media is critical to ensure the prospective visitor moves seamlessly from awareness through consideration and exploration to actual booking.