



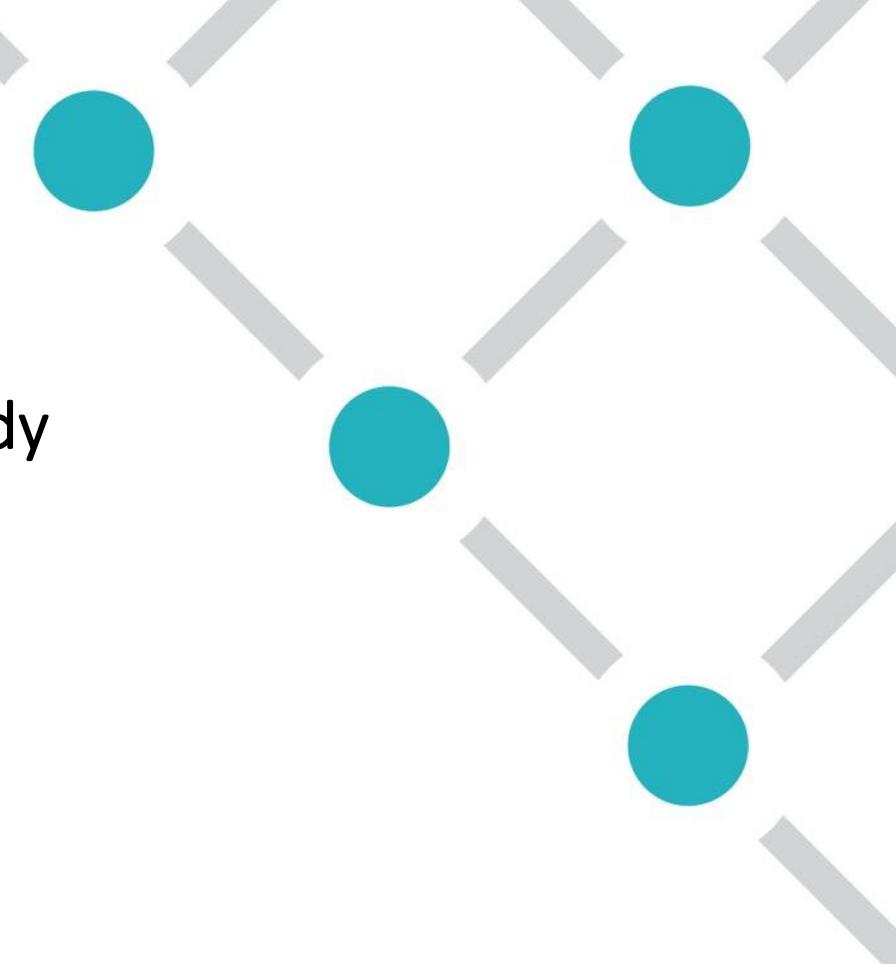
**NARRATIVE**  
RESEARCH

## 2023 US Consumer Study

Presentation of Results:  
*Newfoundland and Labrador*

March 13, 2024

Prepared for:





# 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



## Key Objectives:

- To better understand the factors that currently impact the way that Americans travel.
- Gain insight on how these factors may continue to impact travel intentions, behaviours and destination choices over the short term.
- Assess visitor market potential from each of these two regions.

## Qualifiers:

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.



## Travel Activities

*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.*





# Travel Activities

*Domestic travel is most common among US travellers.*

## ***Top Destinations Travelled in Recent Years***

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

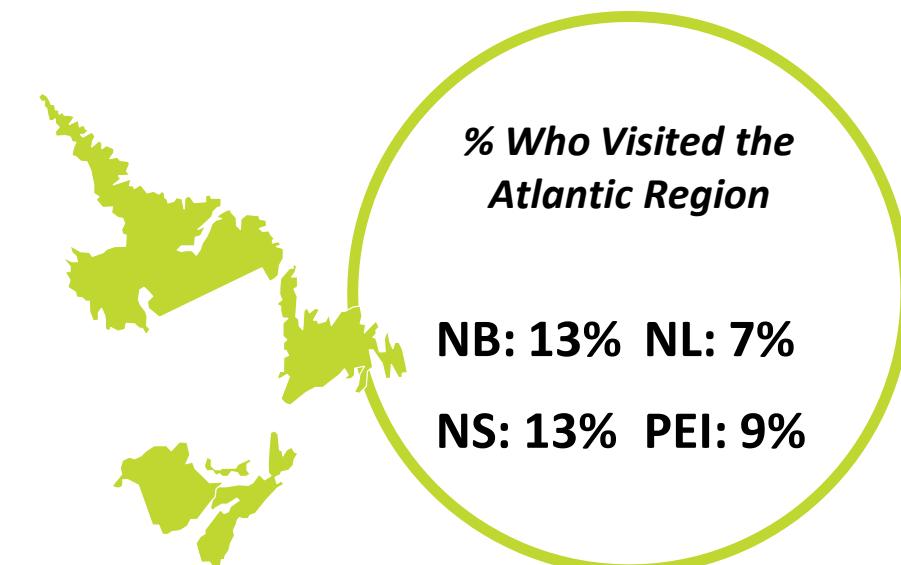
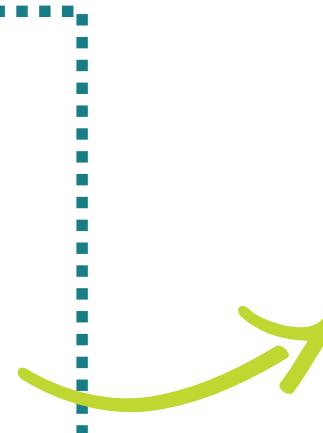
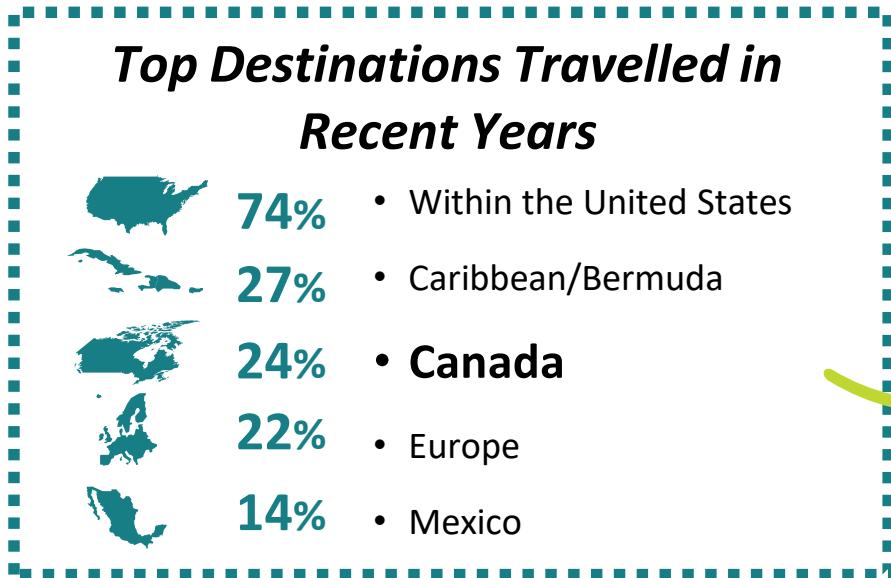


## ***Top US Destinations***

Florida: 40%	New York: 25%	Maine: 17%
California: 17%	Massachusetts: 15%	New Hampshire: 15% New Jersey: 15%
Massachusetts: 15%		



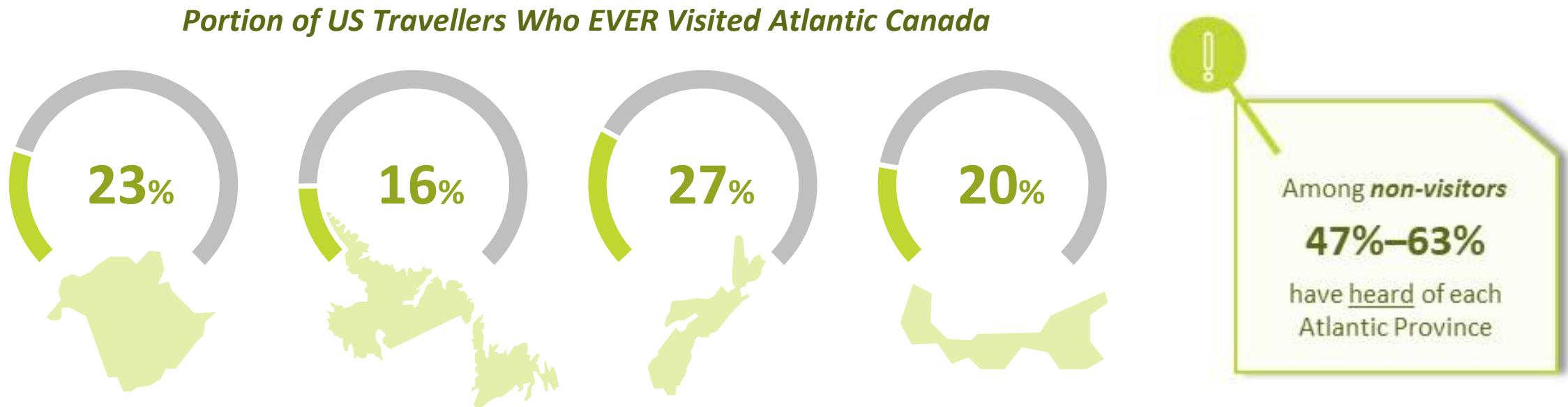
*One-quarter of US travellers have visited Canada in the past three years, with Ontario and Quebec being most visited Canadian destinations.*





## Travel Activities

*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.*

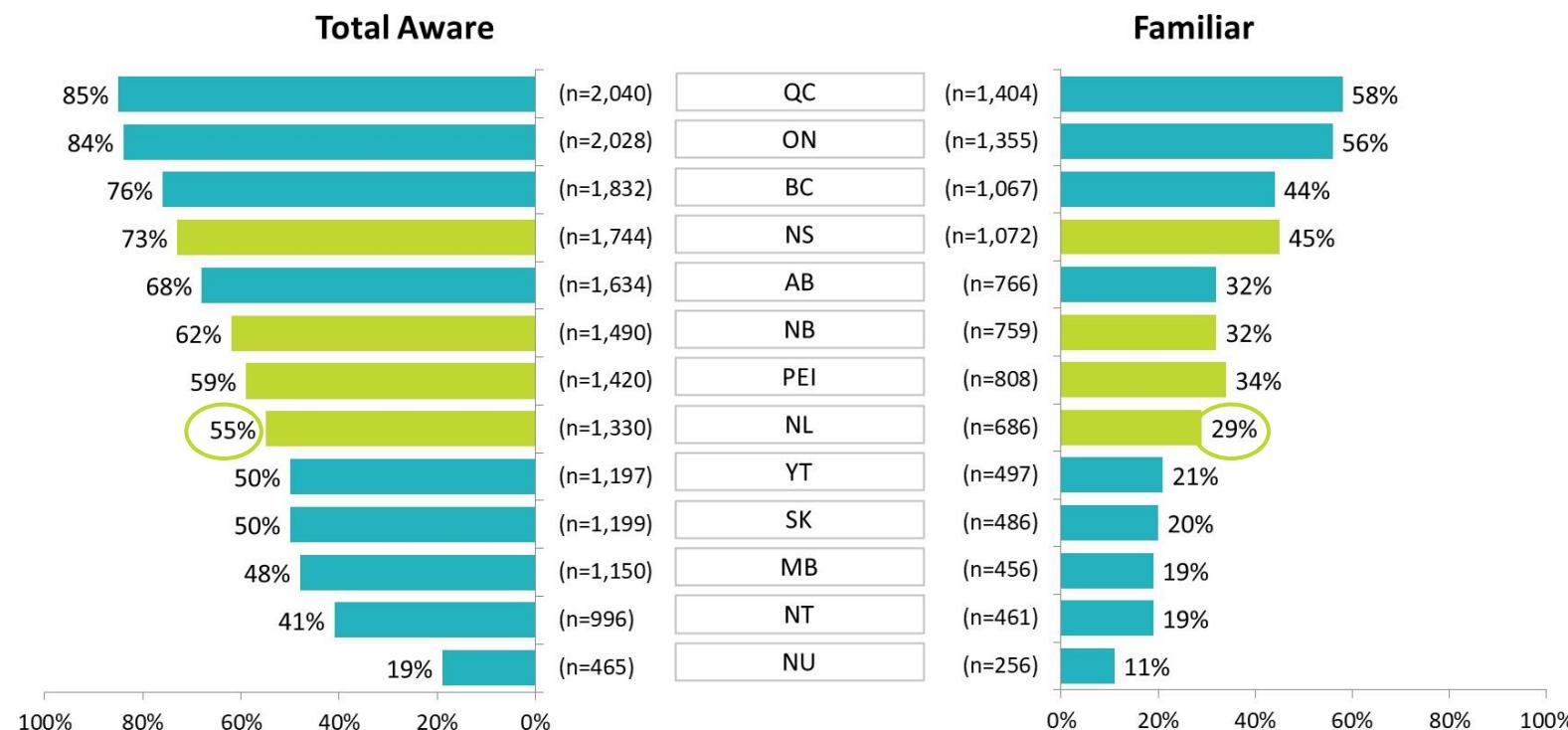




## Awareness & Familiarity Overall

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

### Total Awareness and Familiarity of the US Travellers' Market





# Expectations of Newfoundland and Labrador

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

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

NL: "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."

*Key expectations of NL ...*

## NATURE OCEAN FRONT SIGHTSEEING

NL: "I would focus on the seacoast of Newfoundland and Labrador. I have seen gorgeous hikes along the coast in TV ads and online ads. Since Newfoundland isn't all that far from MA, I'd love to take an adventure trip."

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

NL: "Visit Gros Morne National Park, Cape Spear Lighthouse, and Signal Hill. Birdwatching. View icebergs."

NL: "Breathtaking landscapes, kayaking, swimming, hiking, community."



# Factors Impacting Destination Choice

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

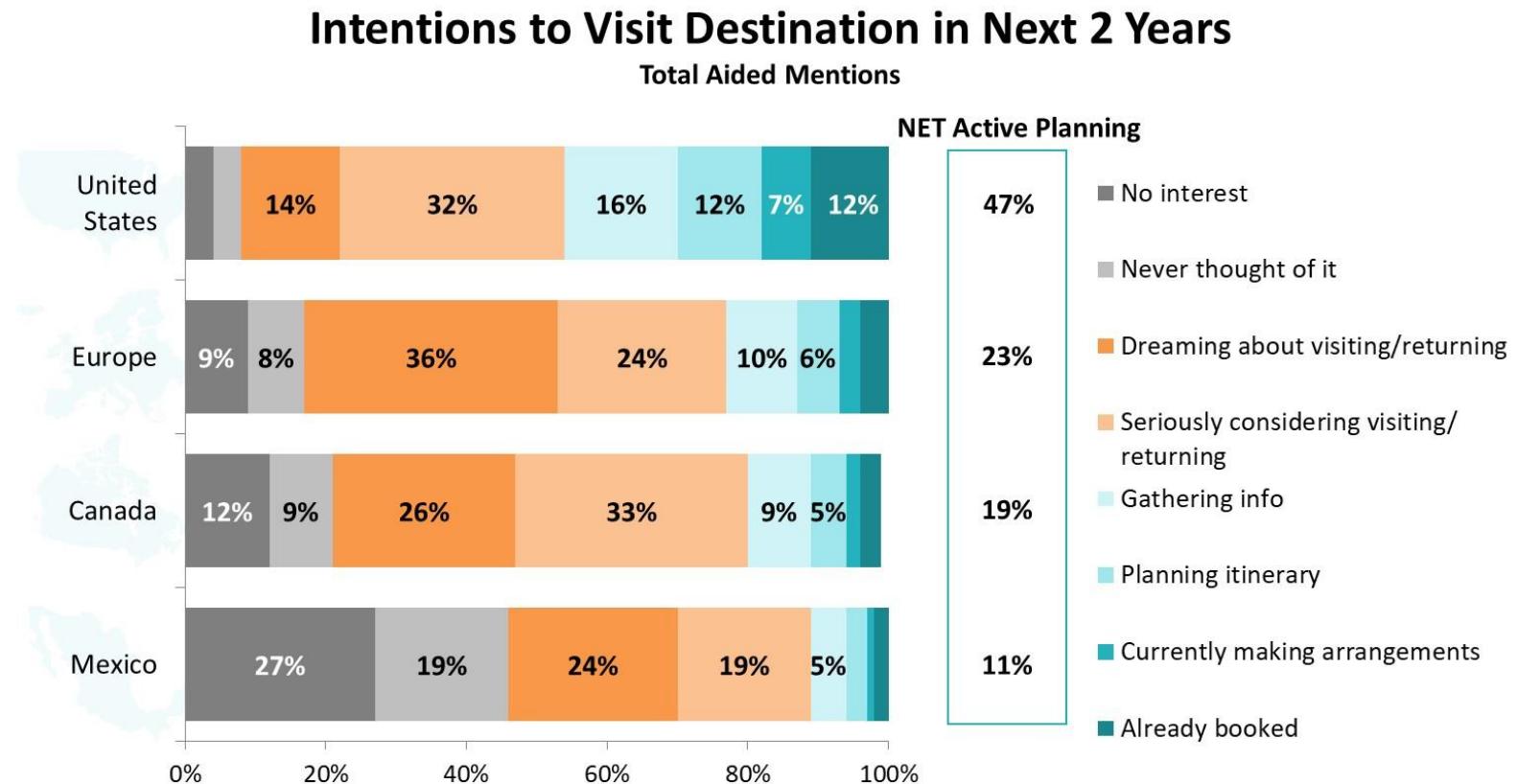
## ***Top 10 Factors Critically Important When Choosing a Pleasure Trip Destination***

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



# Travel Intentions – Destination Comparison (pre-ads)

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



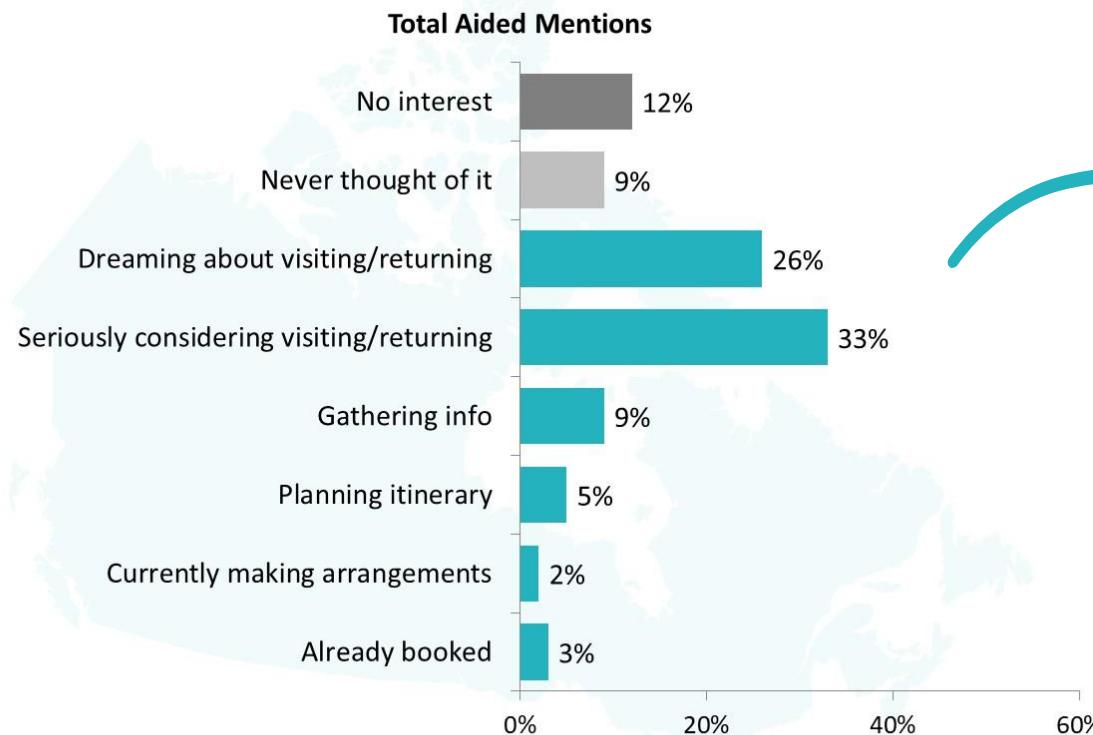
Q.19a-d: Please indicate which statement best describes your intentions to visit [LOCATION] for a pleasure trip of 2 or more nights in the next 2 years?  
(n=2,402) *Note: Mentions of 4% or less are represented by a bar.*



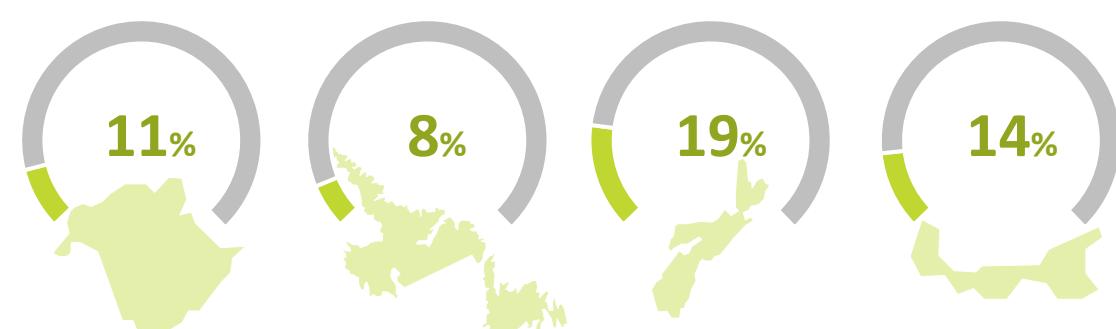
# Travel Intentions (pre-ads)

*One-half of travellers have either already booked or plan to book a trip within the US in next two years. While travellers are likely to consider Canada as a destination, there is less active planning of such trips in the next two years.*

## Intentions to Visit Canada in Next 2 Years



### % Likely to Visit Each Atlantic Province Among Those Open to Taking a Canadian Trip



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)



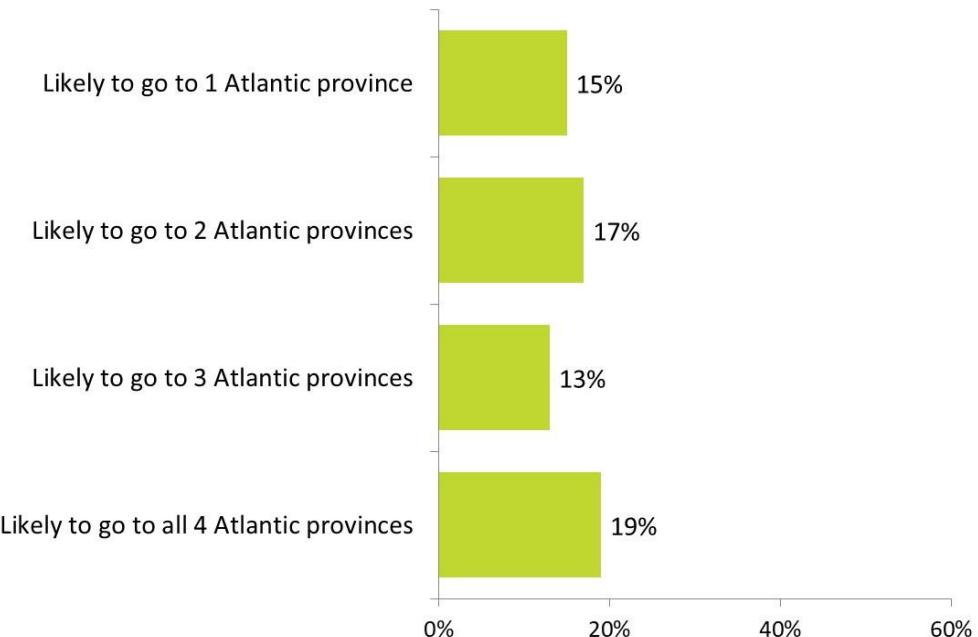
## Travel Intentions (pre-ads)

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



### Likely to Consider Atlantic Canada

% Definitely/Probably Would Consider Visiting

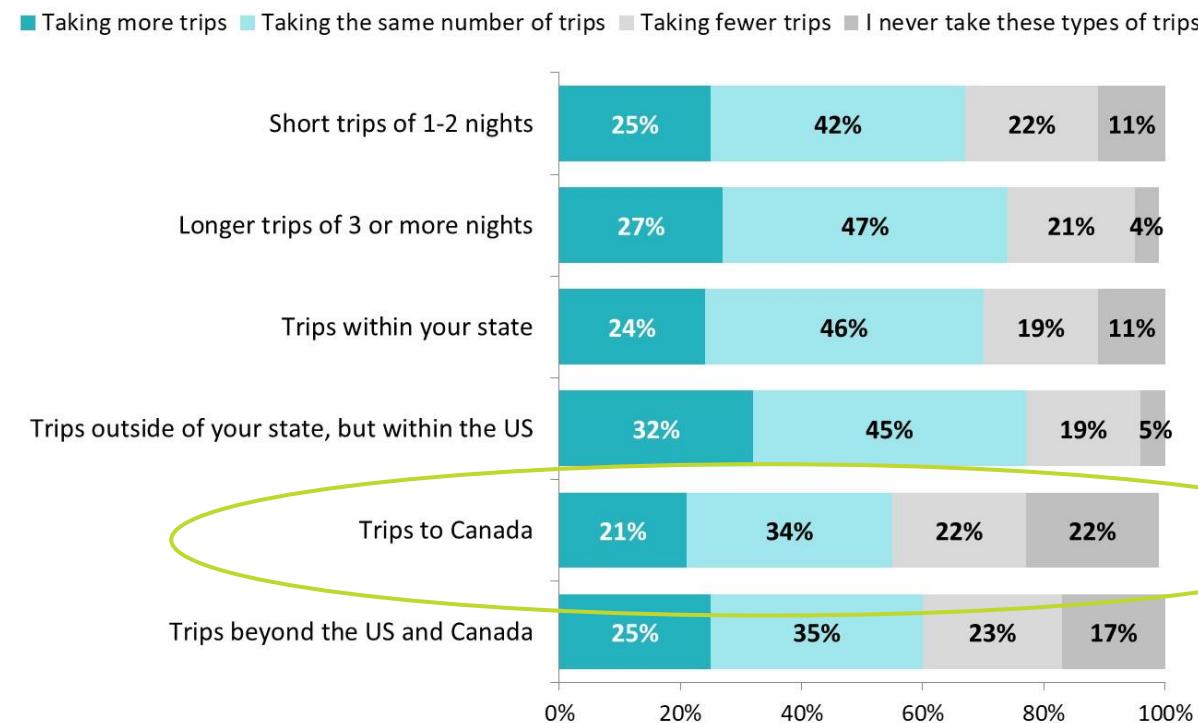




# Future Travel Intentions (pre-ads)

*While the bulk of US travellers anticipate the number of vacation trips they will take in the coming year to be the same or higher than the previous year, it appears Canadian travel will remain relatively stable.*

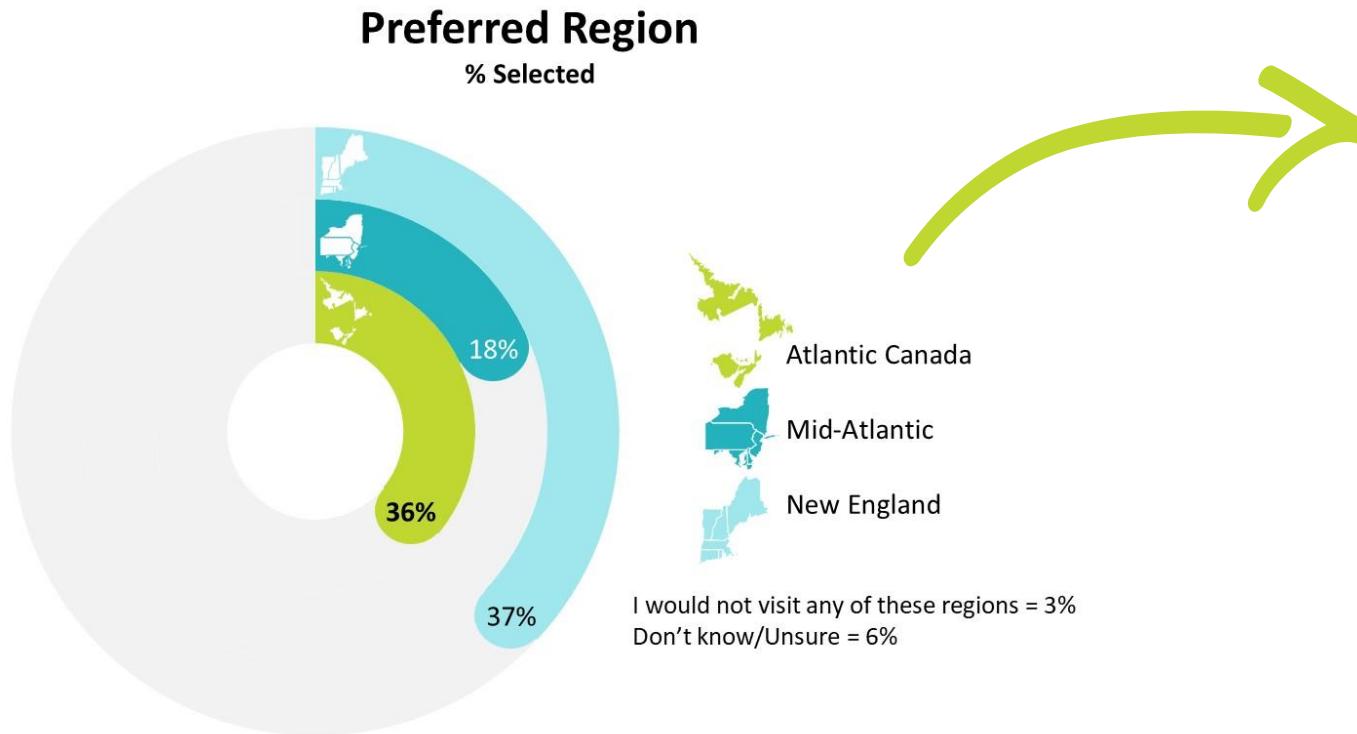
## Future Travel Intentions





## Preferred Destination

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



### 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



# Market Potential

*Findings show there is notable market potential for NL visitation across both markets.*

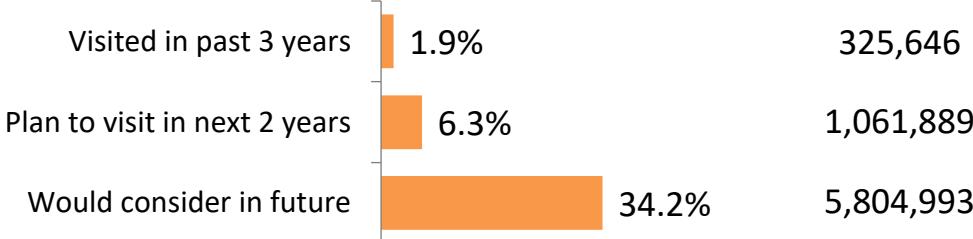
## Mid-Atlantic

Potential  
Visitors\*

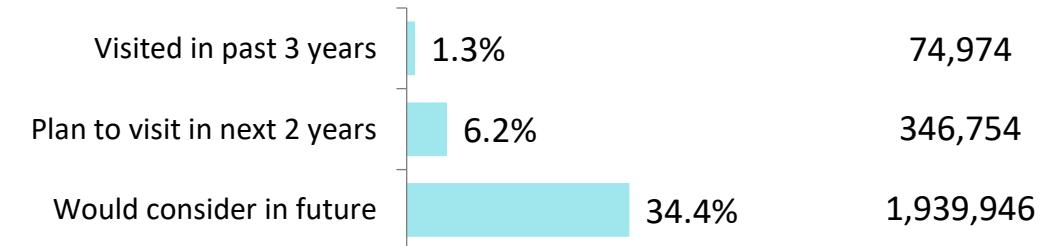
## New England

Potential  
Visitors\*

### Newfoundland and Labrador



### Newfoundland and Labrador



\*Based on US census figures and survey qualification data



# Travel 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.*

## ***The Pleasure Trip Planning Cycle***



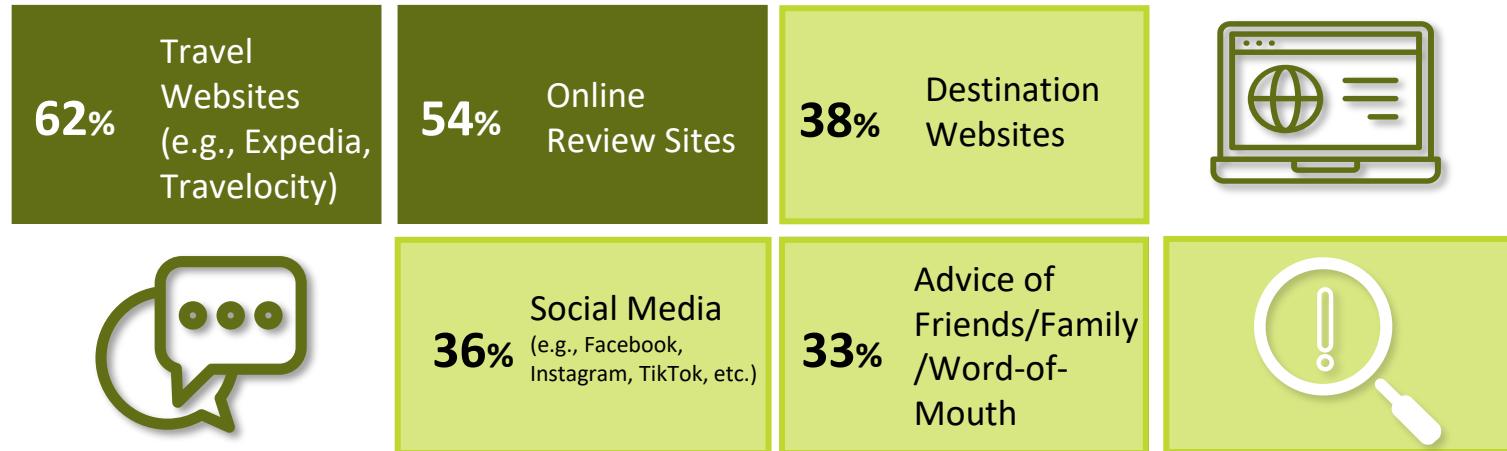
Month Likely to Consider Visiting Atlantic Canada Among Those Likely to Consider Travel to Atlantic Provinces				
	NB	NL	NS	PEI
Sample size (n)	n=1,634	n=1,640	n=1,820	n=1,828
Peak seasons				
June	25%	25%	27%	27%
July	26%	30%	30%	30%
August	24%	26%	27%	27%
September	19%	17%	20%	19%
Average Number Months to Plan/Research and Book				
Plan/Research	4.5	4.9	4.8	4.6
Book	3.5	3.8	3.7	3.9





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

## *Top 5 Information Sources for Atlantic Canada*





# Travel Planning

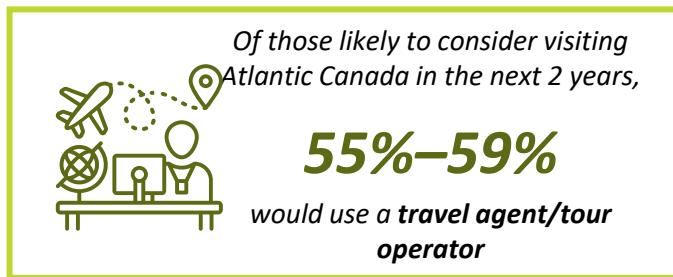
*Air travel is the most common anticipated mode of transportation to Atlantic Canada for vacation.*

Modes of Travel								
Among Those Likely to Consider Travel to Atlantic Provinces								
Sample size		NB		NL		NS		PEI
	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%
Car		24%	38%	22%	31%	23%	36%	21%
Cruise ship		12%	12%	16%	14%	16%	16%	16%
Ferry		5%	8%	6%	11%	8%	17%	8%
Recreational vehicle (RV)		4%	4%	4%	3%	4%	4%	3%
Motor coach		3%	2%	4%	2%	3%	2%	3%
Motorcycle		2%	1%	3%	2%	3%	2%	1%
Other		1%	1%	1%	1%	1%	1%	1%
Don't know at this time		10%	12%	11%	12%	10%	10%	12%



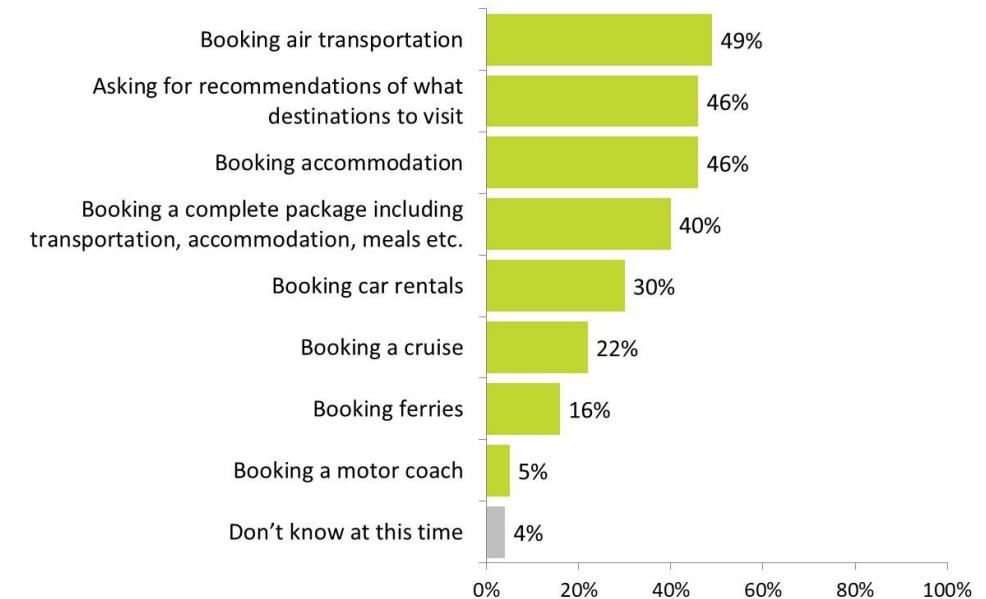
# Travel Planning

*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.*



## Travel Agent/Tour Operator Services Likely to Use

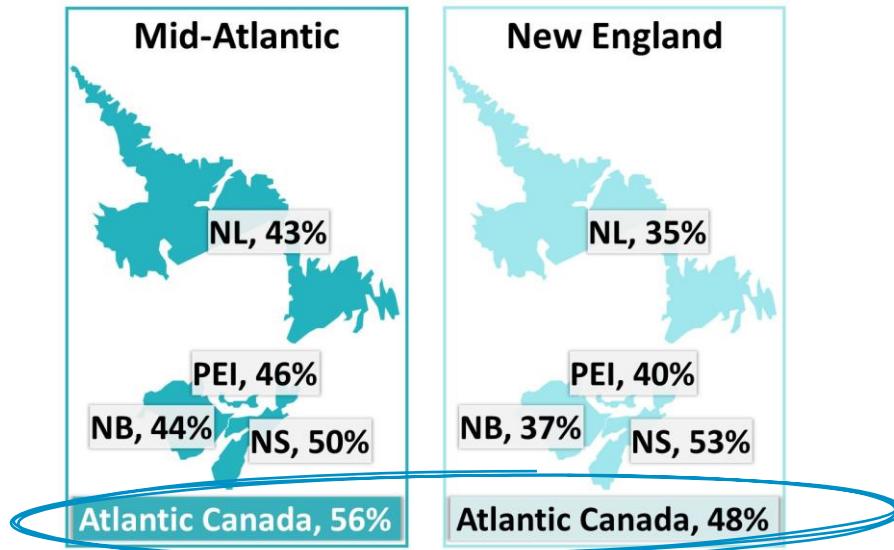
Total Aided Mentions Among Those Who Would Use Travel Agent/Tour Operator



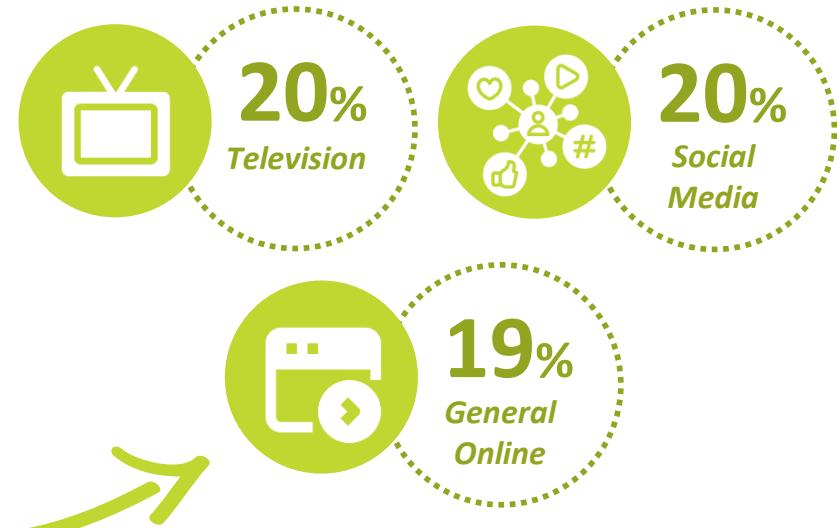


*Exposure to Atlantic Canada tourism advertising is strong, with US travellers being exposed through a variety of advertising mediums.*

## General Recall of Tourism Related Ads By Destination



## Top Recalled Mediums for General Atlantic Canada Ads





## Ad Evaluation

*The NL ads hold broad appeal, with the bulk of US travellers agreeing the ads encourage them to visit the province.*

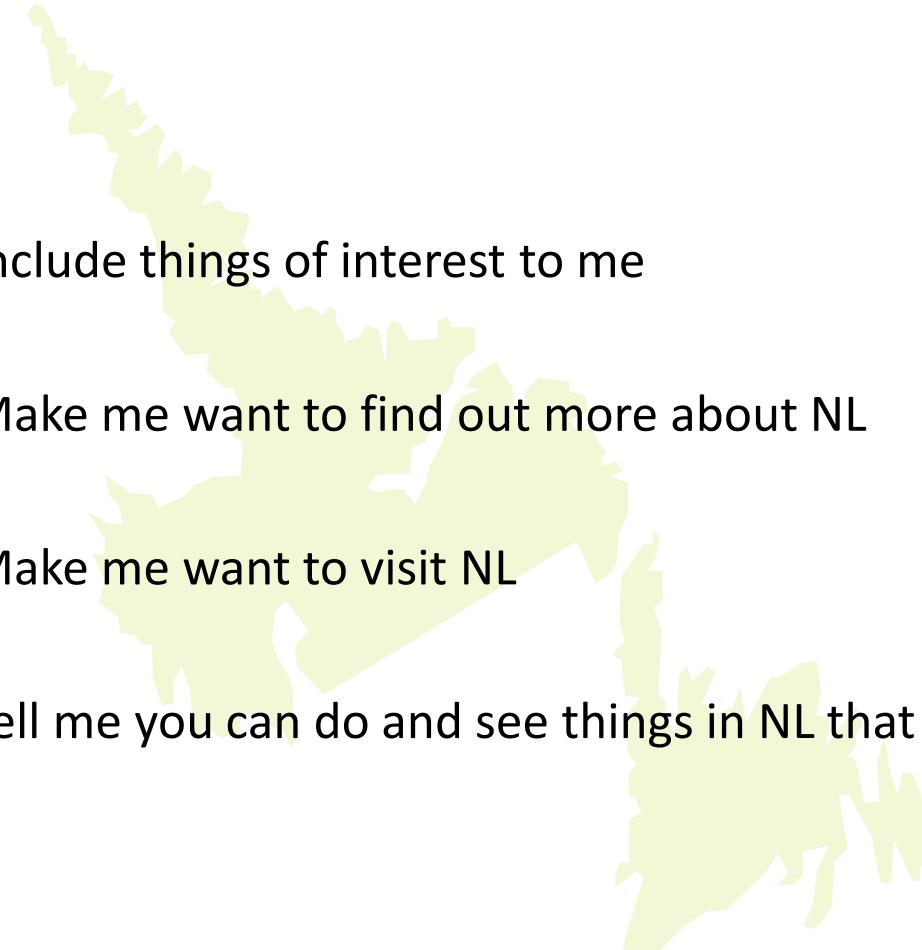




*The NL ads showcase unique things they can see and do that they can't do elsewhere.*



**The ads ...**

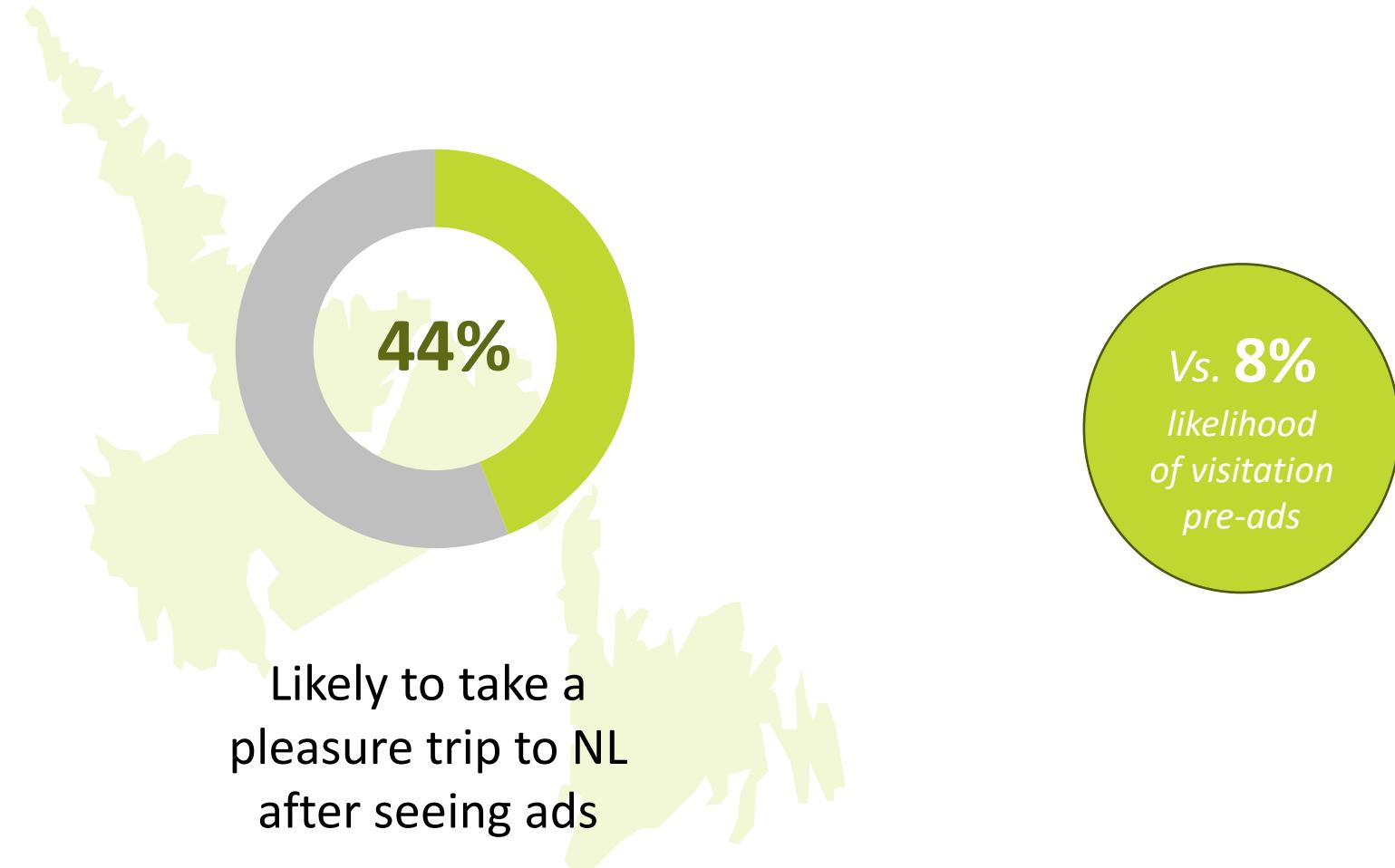


- 67%** Include things of interest to me
- 66%** Make me want to find out more about NL
- 64%** Make me want to visit NL
- 61%** Tell me you can do and see things in NL that you can't elsewhere



## Travel Intentions (post-ads)

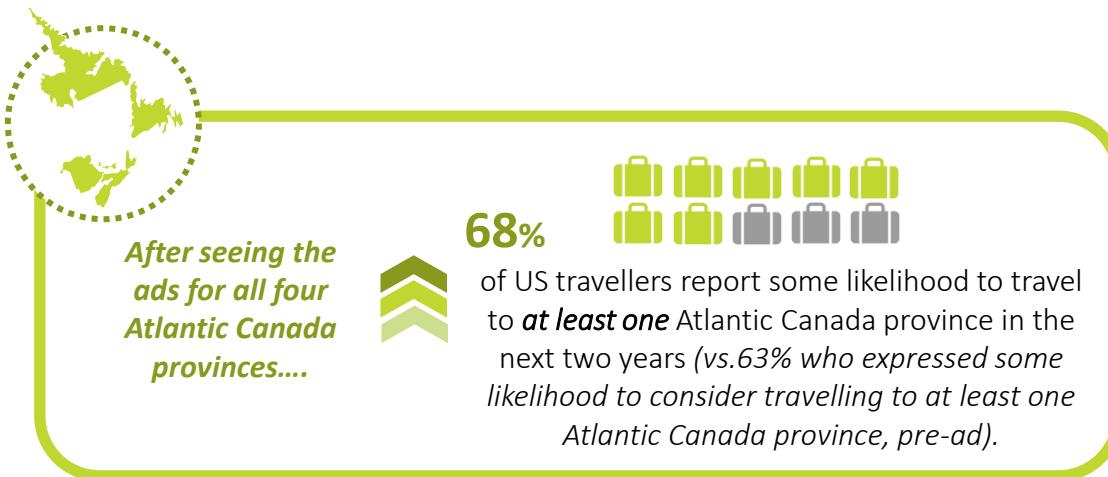
*The advertising positively influences travel intentions to NL.*



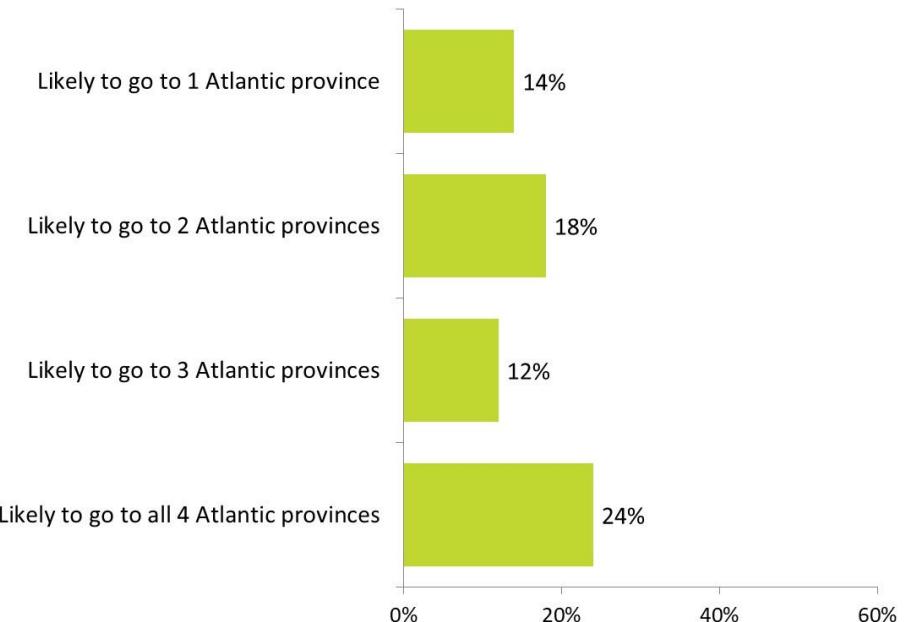


# Travel Intentions (post-ads)

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



**Likely to Visit Atlantic Canada**  
% Definitely/Probably Would Consider Visiting Post Ads





## Looking Forward

- US travellers are generally open to a wide variety of destination choices, and Atlantic Canada holds appeal to many.
- Proximity plays a key role in destination choice.
- Past experience in Atlantic Canada clearly impacts travel intentions.
- Atlantic Canada faces tough competition when looking at the US market.
- Future campaign efforts should focus on media buys in the early Winter and Spring months.
- Differentiation, while considering affordability, will play a key role in encouraging US travellers to select an Atlantic Canada pleasure trip over other destination choices.
- An air travel access solution is needed to meet the US travellers' needs.

every insight tells a story.

