



**NARRATIVE**  
RESEARCH

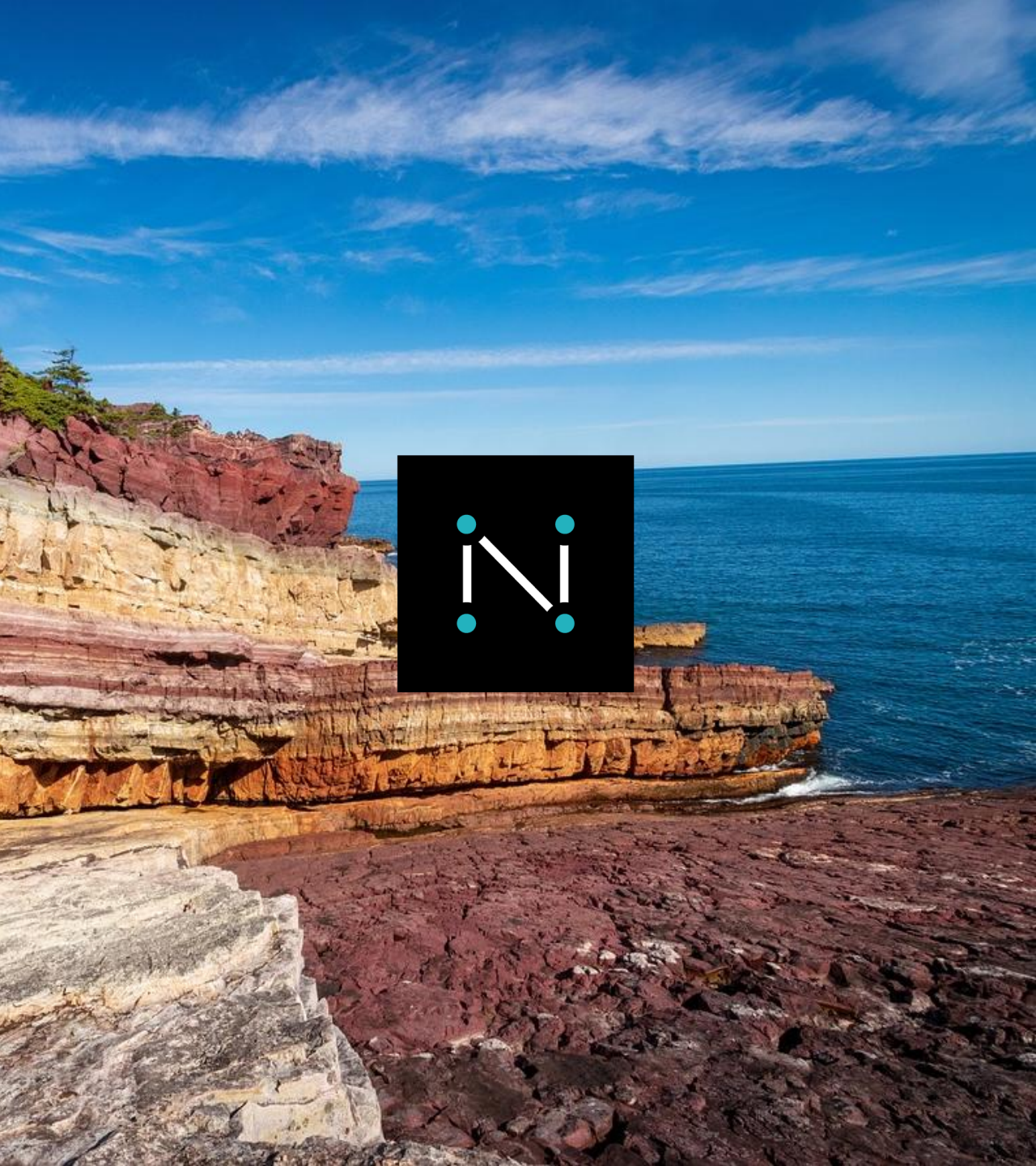
# 2024 US Consumer Research Report

November 2024

Prepared for:



*This project has been made possible through funding provided by the Atlantic Canada Agreement on Tourism (ACAT). ACAT is a nine-member pan-Atlantic initiative comprised of the Atlantic Canada Opportunities Agency, the four Atlantic Canada Tourism Industry Associations, and the four Provincial Departments responsible for tourism.*



# 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 was profoundly impacted by the COVID-19 pandemic. The tourism sector in particular was heavily impacted, with abrupt and massive falling revenues being reported, especially during the first few years of the pandemic. Encouragingly however, the industry has been rebounding. That said, travel habits have been changing and are less predictable post-pandemic across a range of factors, including destination selection and travel behaviours and expectations.

Post-pandemic, it is important to understand the 'new normal' and 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. With this in mind, the Tourism Industry Association of Prince Edward Island (TIAPEI), through the Atlantic Canada Agreement on Tourism (ACAT), commissioned Narrative Research to once again 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 habits and intentions. Moreover, this study aimed at examining reactions to the current marketing campaigns for each Atlantic province and their impact on travel intentions in the near future.

More specific research objectives included:

- Examine where such visitors may have recently travelled (i.e., where they travelled in the past 3 years, including trips specifically to Canada);
- Explore travellers' mindset for upcoming travel (i.e., upcoming travel plans/travel destinations currently under consideration);
- For those unlikely to visit Atlantic Canada, examine perceived barriers to consideration for each province;
- Determine when travellers are most likely to take a vacation;
- Assess unaided and aided recall of advertising for the four individual Atlantic Canadian provinces; and
- Assess awareness of, and the likelihood of visiting, each of the four Atlantic provinces, along with motivating factors for visiting.



# Methodology



## Overview

To meet study objectives, an online survey was conducted with members of a general population online panel. A total of 2,415 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 a paid accommodation**); or
- Have definite plans to take such a trip over the next year.

Overall, 96% of those who completed the survey have taken a recent trip and 4% have definite plans to take such a trip soon. Soft quotas were put in place for age, gender and region for the 2024 study and data is weighted by age, gender, and region.

The survey was based on ACAT’s 2023 US Consumer Survey design, with several revisions made in consultation with the ACAT research team. Data collection was completed approximately two-weeks prior to the 2024 United States presidential election.

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.



**Mode:** Online survey



**Audience:** Travellers from the *Mid-Atlantic* and *New England* regions of the United States



**Completes:** 2,415 travellers  
(*Mid-Atlantic: 1,215 & New England: 1,200*)



**Data Collection Dates:**  
October 15 – 21, 2024



**Average Completion Time:**  
15.7 minutes





# Study Highlights

## Travel Activities

*Ontario and British Columbia are the Canadian provinces most recently visited by US travellers surveyed, with a notable minority having recently visited Atlantic Canada. A strong minority of US travellers are aware of each Atlantic Canada province, with Nova Scotia being the most recognized and familiar province in the region.*

- Domestic travel is most common among US travellers, closely followed by travel to Canada. On average, residents have taken 5.1 separate trips in the past three years. Among those who have taken recent trips, nearly one-half report they have visited Canada.
- In terms of awareness, Nova Scotia is the Atlantic province US travellers are most aware of, closely followed by New Brunswick, then Newfoundland & Labrador, and finally, Prince Edward Island. In terms of familiarity with what there is to do and see in each province, travellers are most familiar with Nova Scotia, New Brunswick, and Newfoundland & Labrador, with PEI trailing behind.

## Travel Intentions

*May to September are peak travel times within Atlantic Canada, with air travel being the preferred mode of travel to the region.*

- The majority of US travellers state they are thinking about or are actively planning a trip to Canada in the next couple of years. Among those who would consider a future trip to Canada, the provinces of Ontario, Quebec, and British Columbia are most selected among both Mid-Atlantic and New England residents. Across Atlantic Canada, New Brunswick and Newfoundland & Labrador are of greatest interest to New England visitors and New Brunswick and Nova Scotia are of greatest interest to those from the Mid-Atlantic region.
- Among those who are likely to consider Canada as a vacation destination, a sizeable portion state they would like to visit all four Atlantic provinces. Interestingly, after seeing advertisements for each of the provinces, the proportion of those considering all four provinces increases. Those who are unlikely to visit or will not consider Canada as a destination cite they are unfamiliar or not interested in the area.
- Unsurprisingly, the warmer spring and summer months are most popular for planning to travel to Atlantic Canada. Indeed, June and July would be the anticipated peak travel months. In terms of preferred modes of travel, air is most preferred among both US markets for all four Atlantic provinces. New England residents are more likely to indicate they would travel by car to each of the provinces as well. Overall, US travellers plan to take the same number or more trips to Canada this year.





## Study Highlights - *Continued*

### Ad Recall

*Exposure to Atlantic Canada tourism advertising is strong.*

- A majority of US travellers are able to recall having recently seen advertising for Canadian tourism, and a sizeable minority can recall ads for the Atlantic Region of Canada. Similar proportions are able to recall specific ads for each of the four Atlantic Canada provinces.
- Recall is greater among New England residents than Mid-Atlantic for all four Atlantic provinces. Among Mid-Atlantic residents, recall is strongest for Nova Scotia and PEI ads, while New England residents recall PEI advertisements most commonly.

### Ad Evaluation

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

- After seeing the ads for each of the four provinces, three-quarters or more of US travellers state they find the ads to be appealing, and similar proportions state the ads motivate them to travel. This inclination to travel is particularly notable among New England residents.
- For each Atlantic province, approximately three in ten strongly agree that the ads make them want to find out more about that specific province.
- Exposure to each of the ads positively impact the likelihood of future travel plans of US travellers and the likelihood to visit all four of the Atlantic Canadian provinces went up following the ad exposure.

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



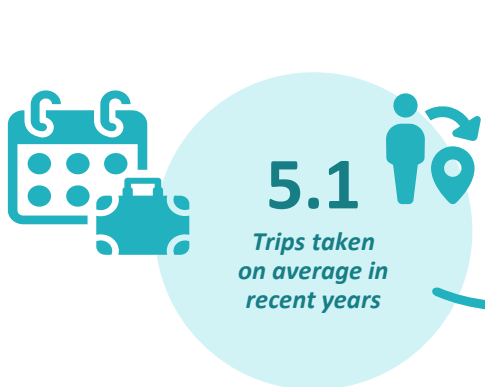


# ACAT – 2024 US Consumer Study

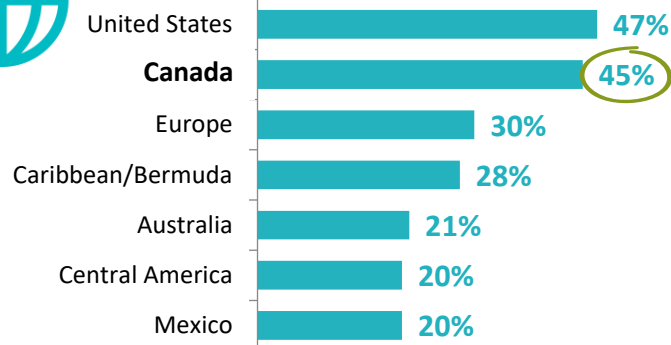
## Key Highlights

Methodology: 2,415 online surveys with US travellers living in the Mid-Atlantic and New England States.

Data Collection: October 15 – 21, 2024.



### Top Destinations Travelled in Recent Years



### Awareness

**34% - 47%**

have **heard** of each Atlantic Province (Full Base)

### Familiarity

**70% - 76%**

who have **heard** of each Atlantic Province are **familiar** with each

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

**86%**

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

**30%**

Are currently gathering information/ planning their itinerary

**While...**

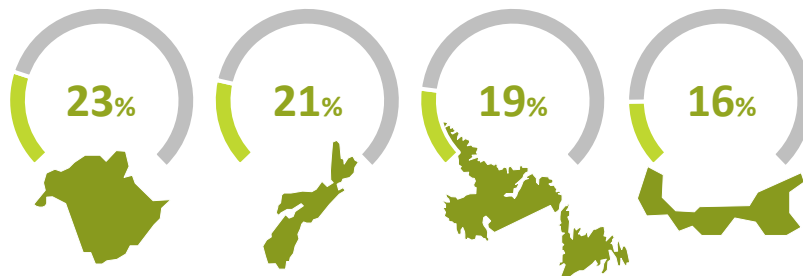
**12%**

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

**28%**

Indicate they will be taking **more** trips to Canada compared to last year

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



**79%**



of US travellers report some likelihood of considering travel to **at least one** Atlantic Canada province in the next 2 years



### Preferred Travel Months

May, June, July, August & September



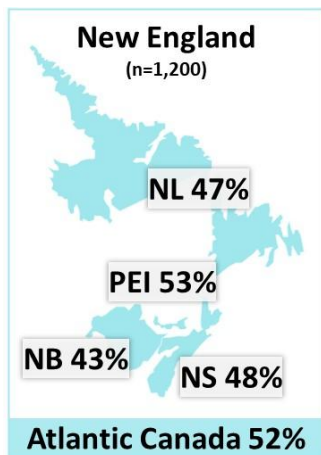
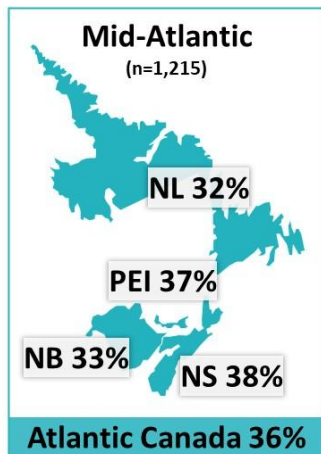


# ACAT – 2024 US Consumer Study

## Key Highlights: Ad Recall

For each province, one 30-second video and online ads were presented.

### General Recall of Tourism Related Ads by Destination

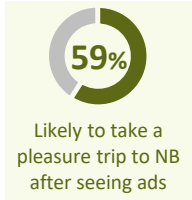


### New Brunswick

The ads...

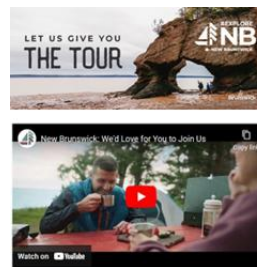
✓ Are Appealing: 77%

🛍️ Motivates Them to Travel: 75%



Agreement with Statements: The ads ...

- 77% • Make NB feel like a friendly/welcoming destination
- 72% • Include things of interest to me
- 70% • Make the destination look like a unique vacation experience
- 70% • Make me want to find out more about NB

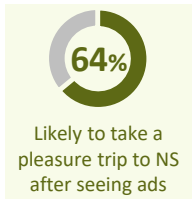


### Nova Scotia

The ads...

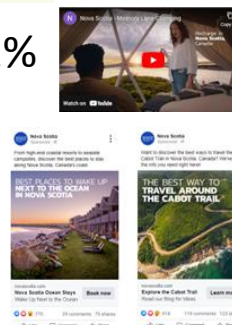
✓ Are Appealing: 74%

🛍️ Motivates Them to Travel: 72%



Agreement with Statements: The ads ...

- 71% • Show that, in NS, you'll never be far from the ocean or its influence
- 67% • Show that NS is Canada's essential seacoast destination
- 67% • Make me want to find out more about NS
- 67% • Include things of interest to me

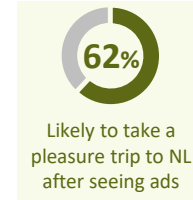


### Newfoundland & Labrador

The ads...

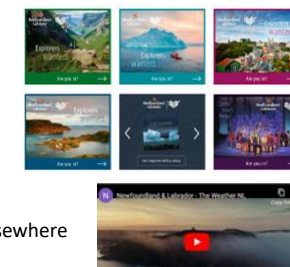
✓ Are Appealing: 79%

🛍️ Motivates Them to Travel: 76%



Agreement with Statements: The ads ...

- 72% • Include things of interest to me
- 71% • Make me want to visit NL
- 71% • Make me want to find out more about NL
- 70% • Tell me you can do and see things in NL you that you can't elsewhere

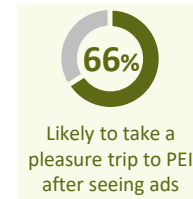


### Prince Edward Island

The ads...

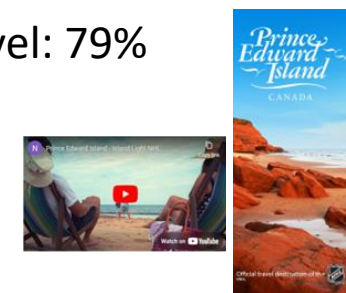
✓ Are Appealing: 81%

🛍️ Motivates Them to Travel: 79%



Agreement with Statements: The ads ...

- 74% • Include things of interest to me
- 73% • Make me want to find out more about PEI
- 73% • Tell me whenever you visit, you'll feel lighter
- 72% • Tell me to come find your island





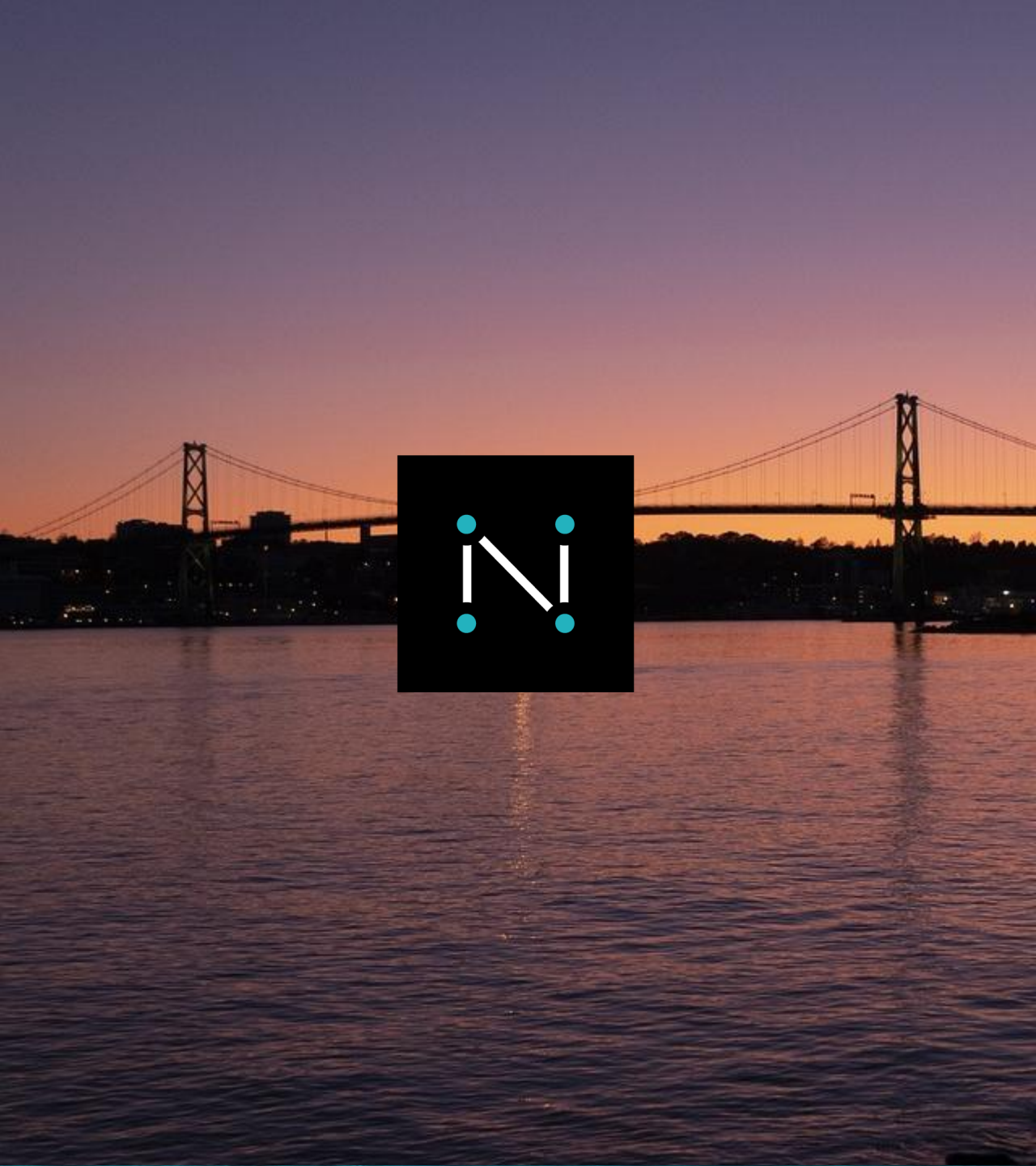


# Looking Forward

*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, US travellers indicate that they are travelling extensively post-pandemic, with increased international travel being reported, particularly among New England residents. Moreover, results suggest that Americans' appetite for travel is likely to continue, with strong intentions to visit Atlantic Canada over the next two years. That said, intentions to travel internationally, including travel to Canada, may be tempered by other influencing factors, such as the potential for notable changes to border control and security measures that may come into effect following the change of US administration in January 2025.
- Consistent with previous research, **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 than Mid-Atlantic residents 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 over the next two years. 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 continues to face tough competition when looking at the US market**, particularly US-domestic travel, and travel to Ontario, Quebec, and British Columbia. Moreover, there remains clear opportunity to build awareness and familiarity with the Atlantic Canada region and its offerings. Increased awareness of a destination significantly influences familiarity with that destination. As such, continued efforts to build awareness of the region, and showing alignment between each Atlantic Province's offerings, and what US travellers consider key motivators for visitation will remain key going forward.
- Overall, current advertising campaigns for each Atlantic province have been well-received, with strong ad recall, particularly with the New England market. Moreover, current ad campaigns have also had a clear positive impact in building interest in visiting multiple provinces within the region.
- While it will be critical to **differentiate Atlantic Canada from other destination choices**, given the current state of the economy and the role cost often plays in travel decision, consideration should also be given to **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, particularly those considered close in proximity.**
- Finally, **air travel access continues to be key in meeting 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 having 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.*



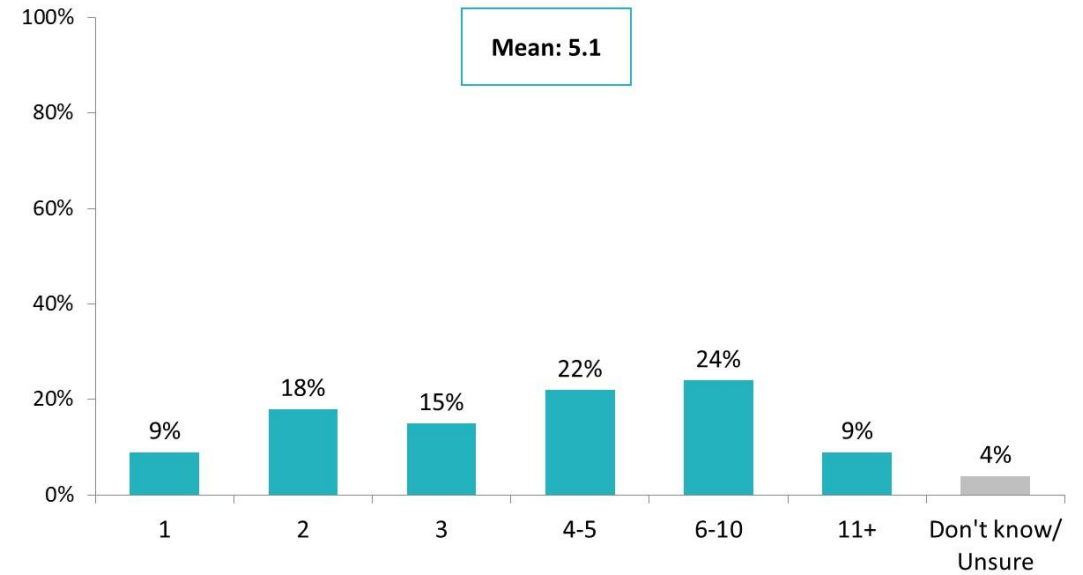
# Recent Out of State Vacation

*Virtually all US travellers surveyed have taken a recent out of state vacation. On average, travellers took 5.1 separate trips 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. Indeed, once given a clear definition of a vacation trip, virtually all US travellers (96%) reported having taken a vacation trip in the past three years while the remaining respondents expressed definite intentions to take such a trip in the coming year. (Tables 4 & 6)

- Among those who recently travelled, the number of vacation trips taken ranged from one (9%) to eleven or more (9%), with the number of trips varying across demographics. On average, travellers took **5.1** trips in the past three years. Few (4%) could not recall how many vacation trips they took in recent years.
- Across key demographics, US travellers with higher household incomes and higher levels of education are more likely than their respective counterparts to report a higher number of recent trips. Conversely, those living alone (or with another adult other than a spouse) are more likely than those living with a spouse/partner or living with children to report a lower number of trips. (Table 5)

### Number of Separate Recent Trips Among Recent Travellers



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=2,336)

*Note: Responses of 'Don't know/Unsure' have been removed from the calculation of the mean score.*



# Destination Country of Recent Travellers

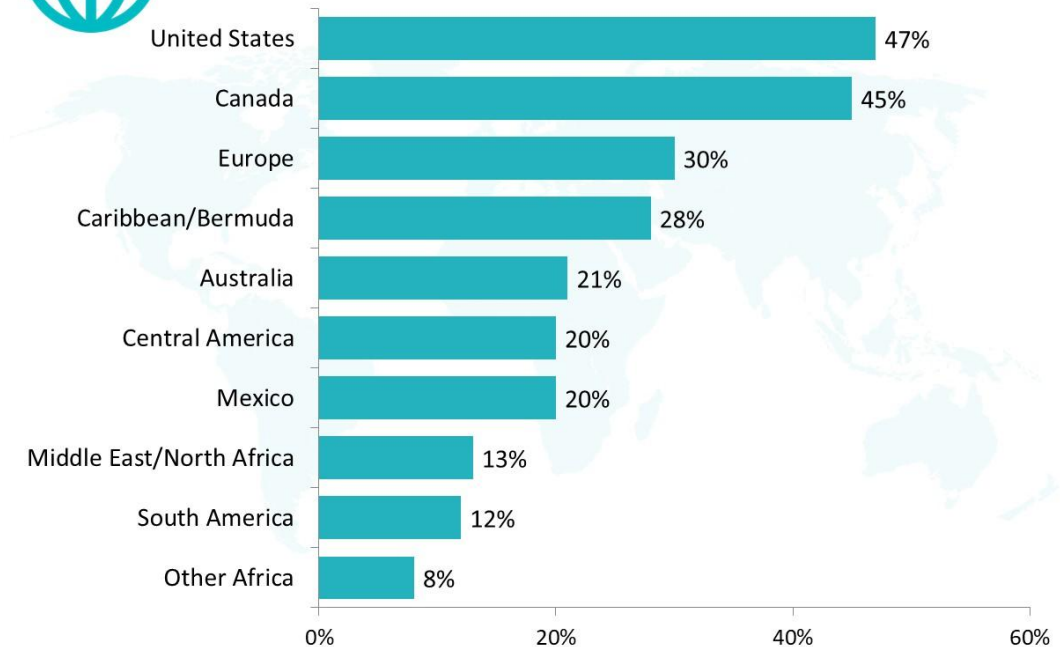
Travel is reported to have extended well beyond US borders, with US travellers being equally as likely to have recently travelled to Canada as to have taken a domestic vacation.

Those who have travelled out of state for 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.

- While the **United States** (47%) is most frequented by travellers, a similar proportion report having travelled to **Canada** (45%), distantly followed by **Europe** (30%), **Caribbean/Bermuda** (28%), **Australia** (21%), **Central America** (20%), and **Mexico** (20%).
- Visits to the **Middle East/North Africa** (13%), **South America** (12%) and **other destinations in Africa** (8%) are each mentioned by approximately one in ten travellers.
- Mentions of recent trips within the **United States** are greater among Mid-Atlantic travellers, while mentions of **Canada** are greater among New England travellers. Reports of domestic vacations increase with age and decrease with household income. US travellers with higher household incomes are also more likely to have traveled to Europe, Australia, and Central America compared to their counterparts. (Table 8)



**Destination Country**  
Total 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=2,336)



# Destination Country of Recent Travellers – US Markets

Choice of destination varied notably across markets, with recent travel to Canada being nearly twice as likely among New England travellers than Mid-Atlantic travellers.

Examining choice of destination country across both US markets reveals notable differences.

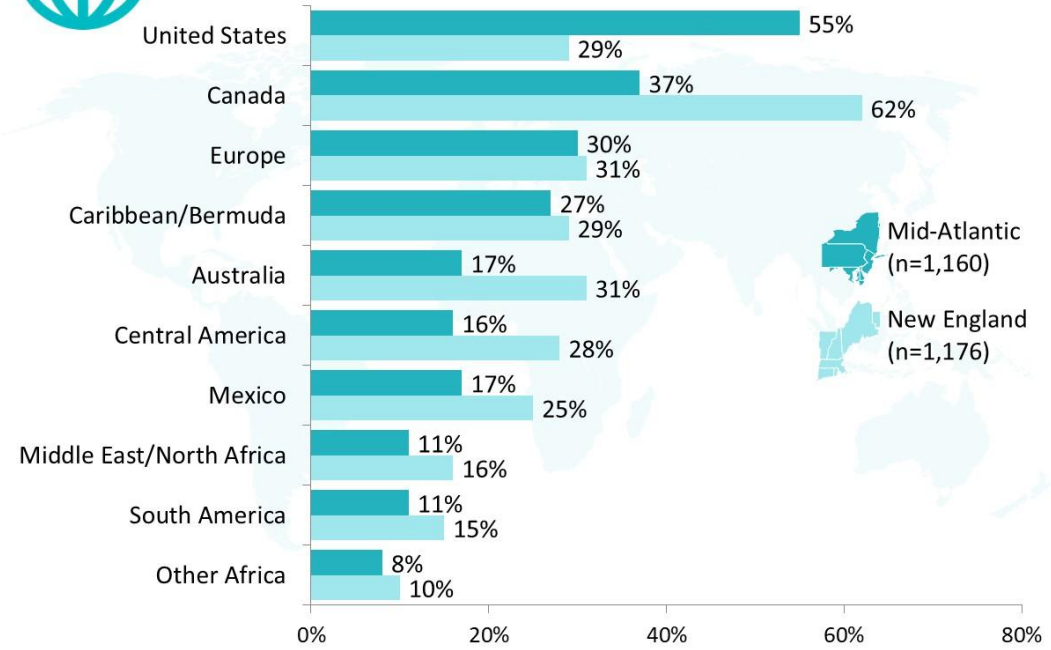
- Recent domestic travel is notably higher among Mid-Atlantic travellers (MA: 55% vs. NE: 29%), while trips to Canada are greater among those from New England (NE: 62% vs. MA: 37%)\*.
- At the same time, trips to Europe and the Caribbean/Bermuda are consistent across markets. (Table 8)

*\*Survey respondents were asked which province / territory they visited for pleasure purposes in the past three years, however, reported rates of visitation appear notably higher than anticipated in some areas, and not in line with Destination Canada reported expenditure data. Accordingly, provincial / territorial visitation findings have been omitted from the report.*



### Destination Country

Total 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?



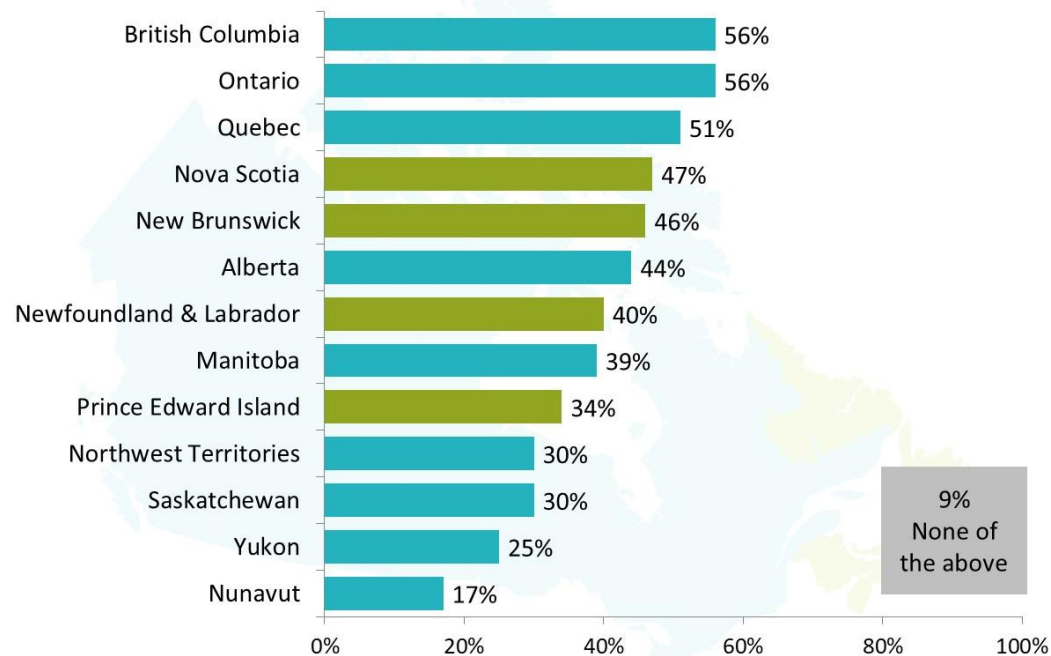
# Awareness of Provinces/Territories Overall

Looking at the US travellers' market overall, awareness is strongest for British Columbia, Ontario, and Quebec. At the same time, many US travelers are aware of each Atlantic Canadian province, with Nova Scotia being the most recognized.

The following provides a summary of total awareness among the US traveller market. (Table 12)

- **British Columbia** and **Ontario** have the highest level of awareness (visited/heard of) overall, with nearly six in ten US travellers aware of each province (56% each), closely followed by **Quebec** (51%). All other Canadian provinces and territories are known by fewer than one-half each.
- At least one-third of US travellers are aware of each of the Atlantic Canada provinces (NS: 47%; NB: 46%; NL: 40%; PEI: 34%). (Table 12)

## Awareness of Provinces Among US Travellers



Q.12: [AMONG FULL BASE] Which Canadian provinces and territories, if any, have you heard of prior to this survey? (n=2,415)



# Familiarity of Provinces / Territories

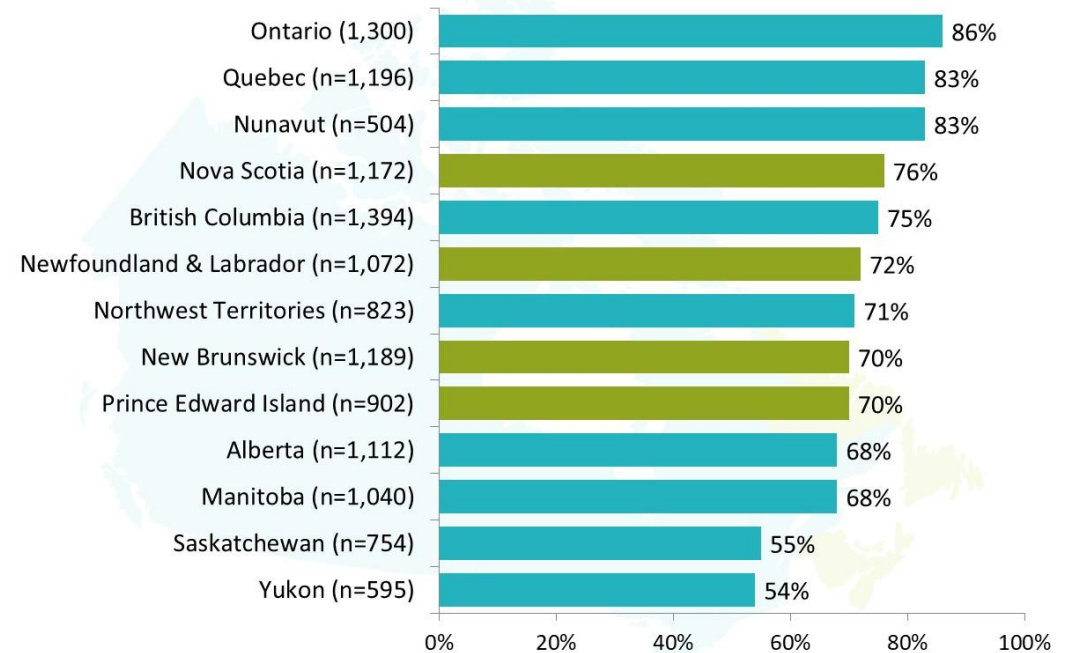
Among those aware of the various provinces, familiarity is strongest for Ontario, Quebec, and surprisingly, Nunavut. Across the Atlantic provinces, familiarity is highest for Nova Scotia.

The following provides a summary of familiarity among the US traveller market who are already aware of each given province. (Table 13)

- Overall, familiarity is also highest among **Ontario**, **British Columbia**, and **Quebec**, with at least four in ten being familiar with what there is to see and do in each. About one-third of US travellers are familiar with the offerings of **Nova Scotia** and **New Brunswick**, while three in ten are familiar with what **Newfoundland & Labrador** has to offer, and one-quarter are familiar with **PEI** offerings (NS: 36%; NB: 32%; NL: 29%; PEI: 24%).
- As would be expected, as shown in the table to the right of the graph, past visitors and those previously aware of Atlantic Canada are notably more likely than non-visitors to report familiarity with what there is to see and do in the region.
- Across US markets (those aware), New England travellers are notably more likely than Mid-Atlantic travellers to report familiarity with each Atlantic province (NB: 40% vs. 23%; NL: 37% vs. 23%; NS: 38% vs. 23%; PEI: 34% vs. 19%). (Table 13)

## Familiarity of Provinces Among US Travellers

Among Those Aware



Q.13: [AMONG PROVINCES VISITED OR HEARD OF BASED ON Q10 & Q12, EXCLUDING THOSE WHO SAID 'NONE OF THE ABOVE' IN Q12] How familiar are you with what there is to see and do in [this/ these] provinces/territories while on vacation?





# Travel Intentions

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





# Intentions to Visit Canada

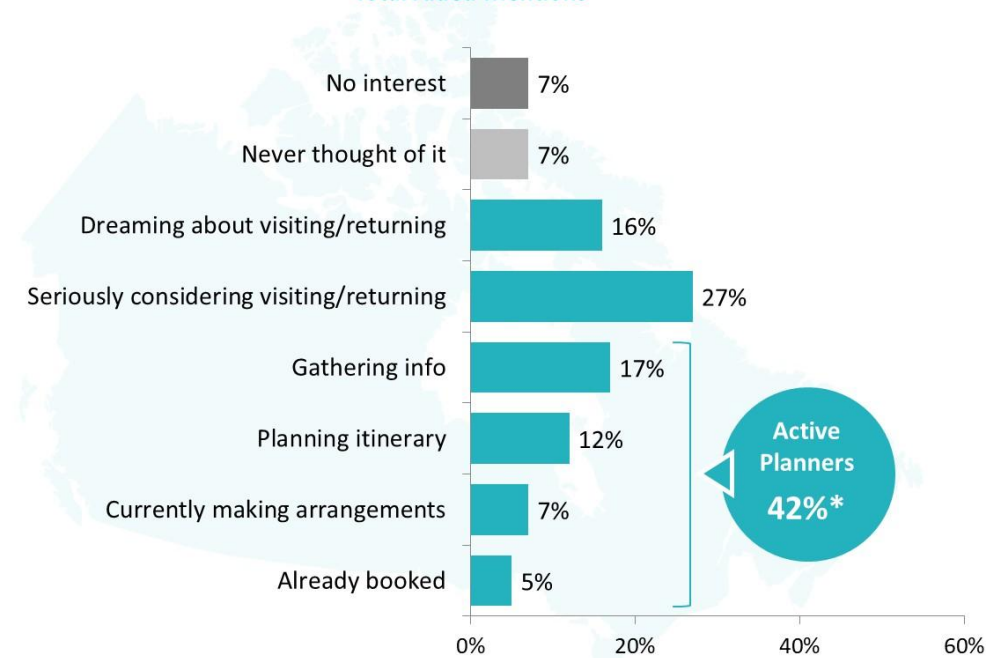
*There are strong intentions to visit Canada within the next two years.*

## Canada

- Overall, four in ten US travellers are in the ‘active planning’ stage when it comes to visitation to Canada over the next two years by **gathering info** (17%), **planning their itinerary** (12%), **currently making arrangements** (7%), or having **already booked** (5%) a trip.
- Even those not actively planning an upcoming Canadian trip appear open to the idea of coming, with a similar proportion (44%\*) stating they are either **seriously considering visiting/returning to Canada** (27%) or are dreaming of taking such a trip (16%).
- Fewer than two in ten each have either **never thought of Canada as a vacation spot** (7%) or **have no interest** (7%) in Canada as a destination.
- Of note, those with household incomes of less than \$75,000 are more likely to report **dreaming about visiting/returning** to Canada (<\$75k: 24%; \$75k - \$150k: 14%; \$150k+: 13%), and marginally more likely than their more affluent counterparts to report **seriously considering visiting/returning** (<\$75k: 31%; \$75k - \$150k: 28%; \$150k+: 22%). (Table 19b)

## Intentions to Visit Canada in Next 2 Years

Total Aided Mentions



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=2,415) \*Due to rounding.

\* Due to rounding





# Provinces Likely to Visit

Ontario remains the top province that Mid-Atlantic travellers intend to visit, while British Columbia remains the top choice for New England travellers when considering a future Canadian vacation.

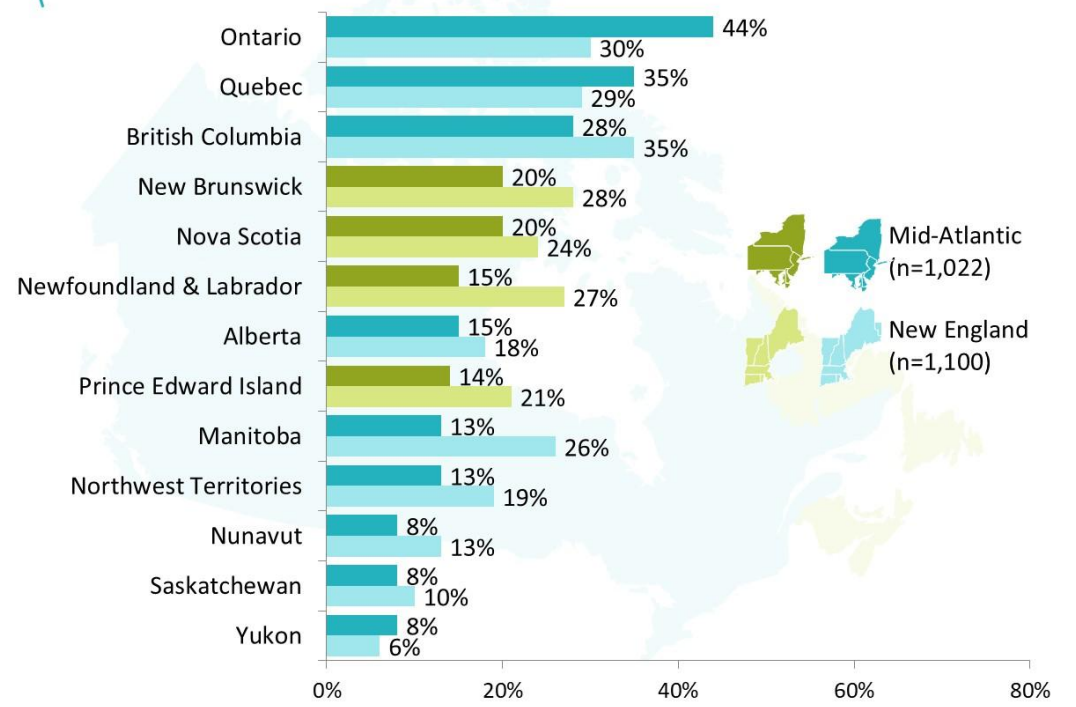
US travellers who intend to visit Canada in the next two years, or are unopposed to such a trip, were asked which province/territory they would visit. Note, this did not include travellers who indicated they never thought of visiting Canada or were not interested.

- Overall, **Ontario**, **Quebec**, and **British Columbia** are the foremost mentioned provinces that travellers intend to visit in the next two years, by both Mid-Atlantic and New England residents. Ontario is mentioned most often by Mid-Atlantic travellers, while British Columbia is mentioned most often by New England travellers.
- Within Atlantic Canada, New England travellers are more likely than Mid-Atlantic travellers to report intentions to visit each Atlantic province. That said, Mid-Atlantic travellers most commonly report intentions to visit **New Brunswick** and **Nova Scotia**, in equal measure. At the same time, New England travellers most commonly report intentions to visit **New Brunswick**, while a similar proportion state they intend to visit **Newfoundland and Labrador**.
- Overall, intentions to visit **New Brunswick** decreases with age (18-34: 30%; 35-54: 20%; 55+: 15%). Intentions to visit the other provinces are generally more consistent across age groups (NS: 18-34: 21%, 35-54: 19%, 55+: 24%; NL: 18-34: 21%, 35-54: 19%, 55+: 16%; PE: 18-34: 17%, 35-54: 14%, 55+: 19%). (Table 21)



## 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.19B] Which Canadian provinces/territories are you likely to visit in the next 2 years?



# Consideration of Specific Travel Destinations

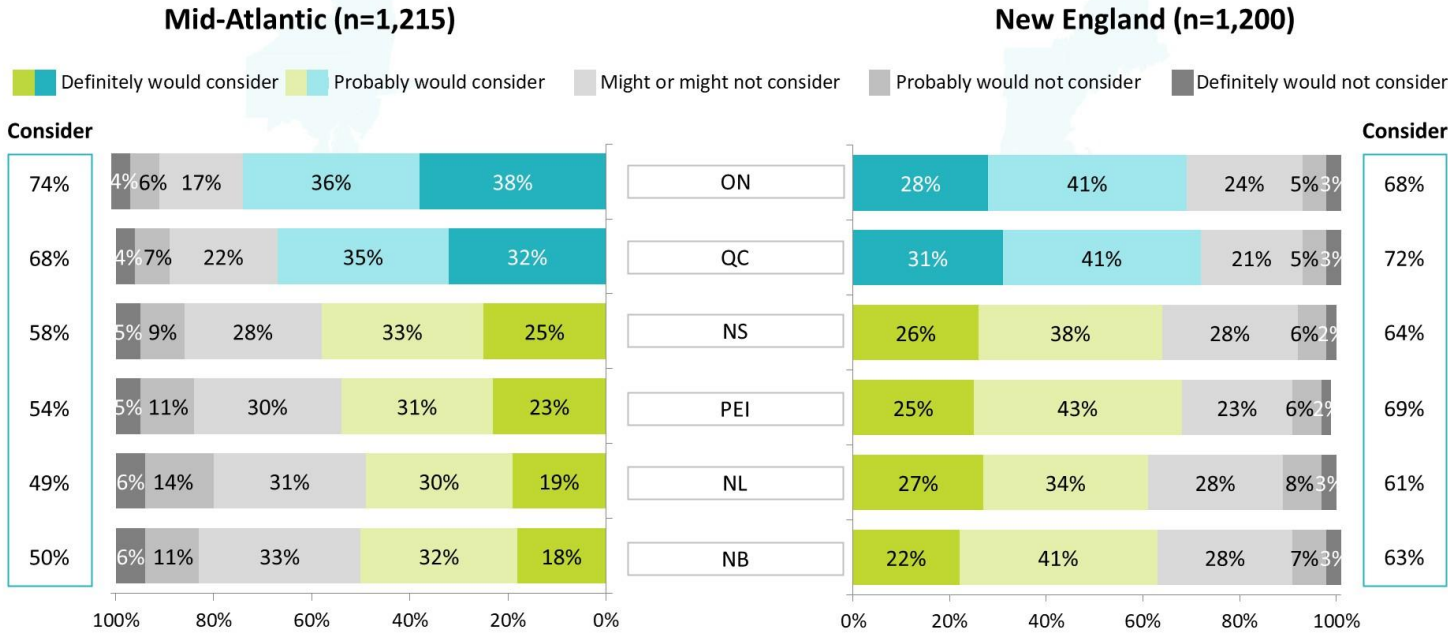
Slight majorities of US travellers are likely to consider the Atlantic provinces as a potential vacation destination within the next two years.

All respondents were then asked how likely they would be to consider specific destination locations, including each Atlantic province, Quebec and Ontario.

When it comes to Atlantic Canada, overall, US travellers are most likely to indicate they *definitely* or *probably* would consider visiting **Nova Scotia** (60%) or **Prince Edward Island** (59%), closely followed by **New Brunswick** (54%), and **Newfoundland and Labrador** (53%).

- New England travellers are more likely than Mid-Atlantic travellers to consider each Atlantic province as part of their travel plans for the next two years.
- New England travellers are most likely to consider **Prince Edward Island** as a travel destination, while Mid-Atlantic travellers are most likely to consider **Nova Scotia**. That said, within each US market, propensity to visit each Atlantic province is comparable (i.e., fewer than 10 points difference between provinces).
- Overall, the inclination to consider an Atlantic Canadian province varies somewhat across demographics. Of note, younger travellers and those with higher household incomes are more likely than their respective counterparts to consider each of the four provinces. Moreover, past visitors to the region are also more likely than non-visitors to say that they would consider a trip each Atlantic province over the next two years. (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

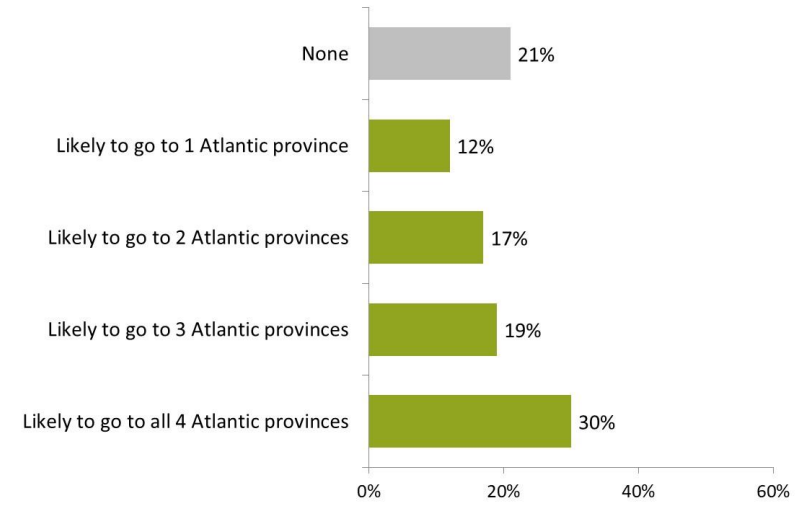
A clear majority of US travellers are likely to consider visiting the Atlantic Canada region over the next two years.

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

- Overall, the bulk of US travellers indicate they would likely consider visiting the Atlantic Canada region over the next two years, with eight in ten expressing some likelihood of visiting at least one Atlantic Canada province in the next two years, while three in ten (30%) express some level of consideration for visiting **all four Atlantic provinces** during this timeframe.
- Travel intentions continue to vary by region, with those from New England being more likely than those from Mid-Atlantic to consider at least one Atlantic Canada province over the next two years (89% vs. 74%). At the same time, across demographics, US travellers under the age of 55 and those with higher annual household incomes are more likely than their respective counterparts to consider visiting an Atlantic Canada province. (Tables 25a-c,e combined)



## Likely to Consider Atlantic Canada Vacation % Definitely/Probably Likely to 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=2,415)



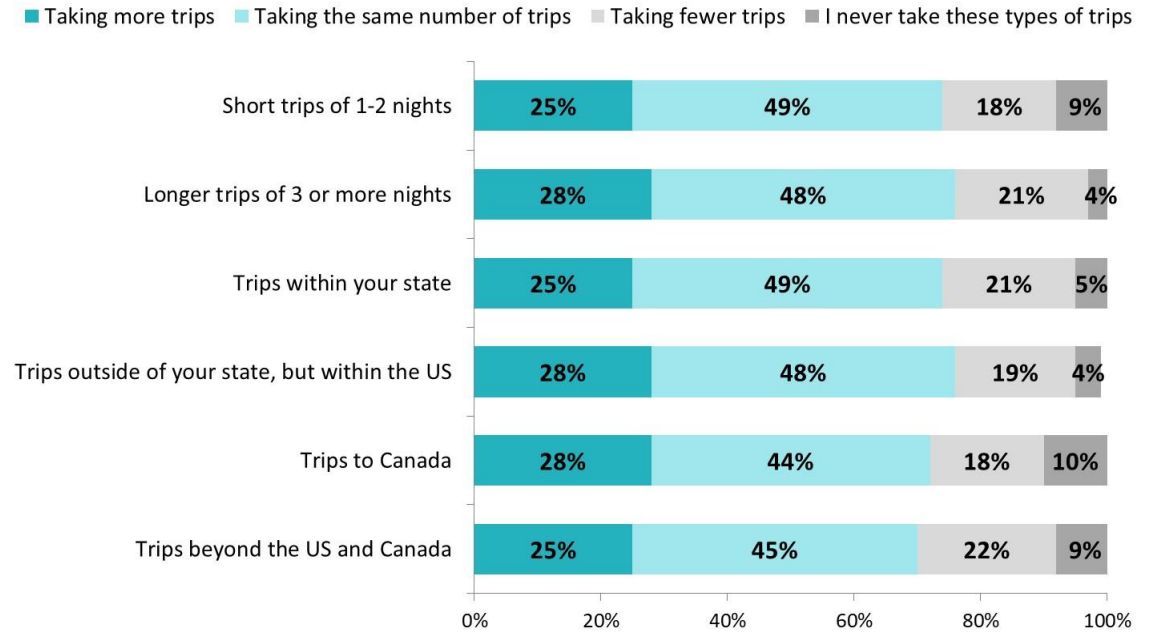
# Future Travel Intentions

US travellers' appetite for travel, including Canadian travel, is expected to continue.

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.

- Reports of future travel intentions are highly consistent across vacation trip types. Indeed, for each vacation type examined, approximately one-quarter each indicate intentions to take more of each listed trip, while about one-half state they plan to take the same number of trips and approximately two in ten state they will be taking fewer trips. No more than one in ten state they never take each listed type of trip.
- When it comes to **Canada** specifically, results suggest that US travellers' positive interest in Canada is likely to continue, with more than four in ten who plan on **taking the same number of trips**. While three in ten travellers state they plan on **taking more trips**, a similar proportion plan on taking **fewer trips** or state they **never take this type of trip**. That said, intentions to travel to Canada in the future may be tempered by other influencing factors, particularly in relation to possible policy changes related to the US-Canada border that may happen following the change in US administration that will take place in January 2025.
- The proportion of travellers planning on taking more trips to Canada increases with household income. (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=2,415)





# Barriers to Considering Atlantic Canada





*Lack of familiarity is the most common barrier for considering Atlantic Canada as a vacation destination.*

US travellers who state they would *probably not* or *definitely not* consider Atlantic Canada as a destination were asked what keeps them from considering any of the Atlantic provinces as a vacation spot.

- Nearly one-half of US travellers currently uninterested in Atlantic Canada as a vacation destination are unable to cite a specific reason for their lack of interest.
- Of those who did cite a reason, US travellers most commonly report a **lack of familiarity** as a barrier, followed by a **lack of personal desire**, and **distance**. A few mention alternative barriers for visitation, including a perception that there's **nothing to do**, **cost concerns**, **climate**, **having other preferred destination choices**, and **transportation limitations**.
- Overall, older travellers are more likely than their younger counterparts to report a lack of familiarity as a barrier (18-34: 9%; 35-54 years: 18%; 55-75 years: 20%).
- With the exception of New Brunswick, those in Mid-Atlantic are more likely than those in New England to express a **lack of familiarity** as a barrier to visiting each Atlantic province as a vacation destination (NB: 17% vs. 16%, NL: 22% vs. 12%, NS: 13% vs. 4%, PEI: 20% vs. 9%, respectively). (Tables 14, 15, 16, 17)

## Barriers to Considering Atlantic Canada as a Vacation Destination

Among Those **Not** Likely to Consider Travel to Atlantic Provinces

	 NB	 NL	 NS	 PEI
Sample size (n)	n=315	n=354	n=261	n=277
<b>Unfamiliar/Don't know much about it</b>	<b>17%</b>	<b>20%</b>	<b>11%</b>	<b>18%</b>
<b>Not interested/No personal desire</b>	<b>9%</b>	<b>8%</b>	<b>12%</b>	<b>8%</b>
<b>Distance/Too far away</b>	<b>7%</b>	<b>8%</b>	<b>9%</b>	<b>8%</b>
Nothing to do there/Boring destination	4%	2%	2%	4%
Price/Expensive	3%	4%	4%	3%
Climate/Weather conditions	3%	5%	5%	4%
Other preferred destinations/take priority	3%	3%	3%	4%
Time constraints/No time for vacation	1%	2%	2%	1%
Transportation limitations/Not sure how to get there	1%	2%	1%	1%
Other	6%	6%	6%	5%
<b>Nothing is keeping me from considering it</b>	<b>3%</b>	<b>1%</b>	<b>6%</b>	<b>4%</b>
<b>Don't know/Unsure</b>	<b>49%</b>	<b>46%</b>	<b>45%</b>	<b>44%</b>

Q.14, 15, 16, 17: [IF 'DEFINITELY WOULD NOT' OR 'PROBABLY WOULD NOT CONSIDER' [PROVINCE] IN Q25] What if anything keeps you from considering [NB / NL / NS / PEI] as a vacation destination?





# Trip Planning





The peak travel season for Atlantic Canada spans five months, with May to September identified as top travel months for an Atlantic Canada vacation.

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

- Unsurprisingly, for all Atlantic Canadian destinations, the months of **May to September** hold the greatest appeal. Of note, travellers are also slightly more inclined to consider visiting each of the provinces in the first quarter of the year (January-April) than the last quarter (October-December).
- While months of interest are generally consistent between the two US markets, travellers from the New England region are more likely than those from the Mid-Atlantic region to consider visiting Atlantic Canada in February, March, September, October, and November.
- Older travellers are slightly more likely than their younger counterparts to consider the months of **June to September**. (Table 26)

## Month Likely to Consider Visiting Atlantic Canada

Among Those Likely to Consider Travel to Atlantic Provinces

	 NB	 NL	 NS	 PEI
Sample size (n)	n=2,100	n=2,061	n=2,154	n=2,138
January	16%	12%	11%	6%
February	16%	15%	12%	9%
March	14%	16%	13%	11%
April	17%	18%	17%	13%
<b>Peak Seasons</b>				
<b>May</b>	<b>19%</b>	<b>20%</b>	<b>20%</b>	<b>16%</b>
<b>June</b>	<b>22%</b>	<b>23%</b>	<b>25%</b>	<b>24%</b>
<b>July</b>	<b>23%</b>	<b>25%</b>	<b>27%</b>	<b>26%</b>
<b>August</b>	<b>19%</b>	<b>21%</b>	<b>23%</b>	<b>21%</b>
<b>September</b>	<b>15%</b>	<b>17%</b>	<b>20%</b>	<b>17%</b>
October	11%	13%	14%	14%
November	8%	9%	12%	11%
December	7%	8%	8%	9%
Don't know	9%	10%	9%	12%



Q.26: [IF 'LIKELY TO CONSIDER TRAVEL TO ATLANTIC PROVINCE' IN Q.25] Thinking about a future trip to [INSERT ALL RELEVANT ATLANTIC PROVINCES MENTIONED], during which month(s) would you likely take this trip?





# Preferred Modes of Travel

Air travel continues to be the most common anticipated mode of transportation to Atlantic Canada for vacation, especially for those living in the Mid-Atlantic region.

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.

- US travellers are most likely to indicate they would travel by **air** to any of the four Atlantic Canadian provinces, distantly followed by reports of by **car**. All other methods of travel are considered by fewer proportions each.
- The inclination to travel by **air** is more significant amongst those living in Mid-Atlantic compared to those from the New England area. On the other hand, those living in New England more commonly cite they would travel via **car** to each of the four provinces.
- Those living in New England are more likely than those living in the Mid-Atlantic region to express intention to travel to Atlantic Canada via **ferry**, for each of the provinces.
- Younger travellers more commonly state they would travel to each of the four provinces by air, compared to older residents who would prefer to visit by car. (Table 30)

**Modes of Travel**  
Among Those Likely to Consider Travel to Atlantic Provinces

	NB		NL		NS		PEI	
	Mid-Atlantic	New England	Mid-Atlantic	New England	Mid-Atlantic	New England	Mid-Atlantic	New England
Sample size (n)	n=1,007	n=1,093	n=983	n=1,078	n=1,044	n=1,110	n=1,026	n=1,112
Air	66%	47%	59%	43%	60%	39%	56%	41%
Car	22%	32%	22%	29%	24%	33%	22%	27%
Cruise ship	14%	26%	18%	30%	17%	27%	16%	24%
Ferry	6%	16%	10%	21%	9%	20%	10%	22%
Recreational vehicle (RV)	5%	10%	6%	12%	6%	14%	4%	11%
Motor coach	5%	15%	6%	17%	7%	18%	7%	16%
Motorcycle	4%	11%	6%	15%	6%	13%	5%	11%
Don't know	9%	9%	10%	10%	8%	8%	10%	10%

Q.30: [IF 'DEFINITELY WOULD' / 'PROBABLY WOULD' / 'MIGHT OR MIGHT NOT' CONSIDER TRAVEL TO ATLANTIC PROVINCE IN Q.25] How would you likely travel from your home to [this/these] destination[s]?





# Ad Recall & Evaluation

*The following section provides an overview of recall of tourism related advertising for various destinations, along with respondents' perceptions of the 2024 advertising campaign for each Atlantic province. For each province, one 30-second video and online ads were presented.*

*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.*

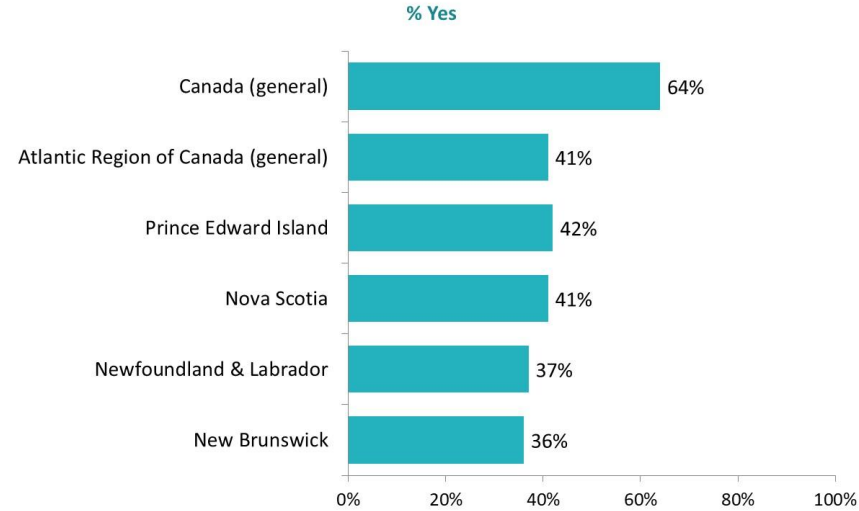


# Overall Ad Recall By Destination

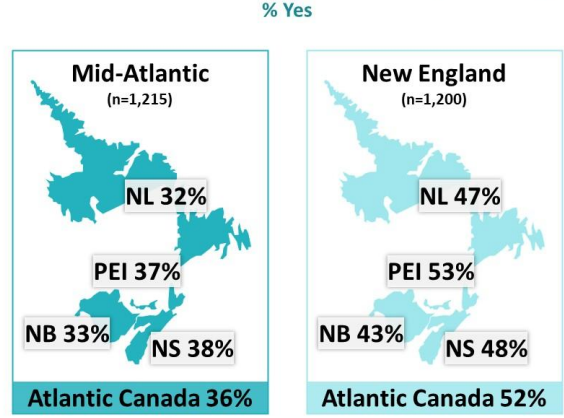
Exposure to Atlantic Canada tourism is strong, particularly within the New England region. Sizeable minorities recall ads for Atlantic Canada and each Atlantic Canadian province.

- Overall, two-thirds of US travellers report they have seen recent advertising related to Canadian tourism in general. Four in ten have had recent advertising exposure related to the Atlantic Canada region overall, while similar proportions recall ads for each Atlantic province.
- Across US markets, recall of Atlantic Canada travel advertising, both overall and for each province, is notably stronger within the New England region. Specifically, when considering each province’s travel advertising and promotions, more than one-half of New England travellers recall ads related to Prince Edward Island, while slightly fewer recall such ads for Nova Scotia, Newfoundland & Labrador, and New Brunswick. At the same time, nearly four in ten Mid-Atlantic travellers recall ads related to Nova Scotia, while the same proportion recall ads for Prince Edward Island, closely followed by ads for New Brunswick and Newfoundland & Labrador. (Tables 34a-l)

### Ad Recall for Destinations



### Recall of Atlantic Canada Ads by US Region



Ad recall for Atlantic Canada (general) and each Atlantic Canadian province is greater amongst younger US travellers.

Q.34a-f: 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=2,415)





# Ad Evaluation: New Brunswick

The New Brunswick campaign is considered appealing and motivating, positively influencing a desire to find out more about the province.

- Three-quarters of US travellers find the ads to be **appealing**, with one-third (32%) considering them to be *extremely* appealing.
- Three-quarters of US travellers also agree that these ads would **motivate them to travel to NB** in the future.
- The NB campaign performed strongly across each attribute evaluated, with at least seven in ten expressing agreement, to some extent. Indeed, three-quarters of travellers agree that the ads **make New Brunswick feel like a friendly and welcoming destination**, with one-third citing strong agreement. Another seven in ten agree that the ads **make the destination look like a unique vacation experience, make me want to find out more about New Brunswick, and include things that are of interest to me.**
- Overall, results are generally consistent across both US markets, with New England travellers being marginally more likely to find these ads appealing and motivating. (Tables 35-37: NB)

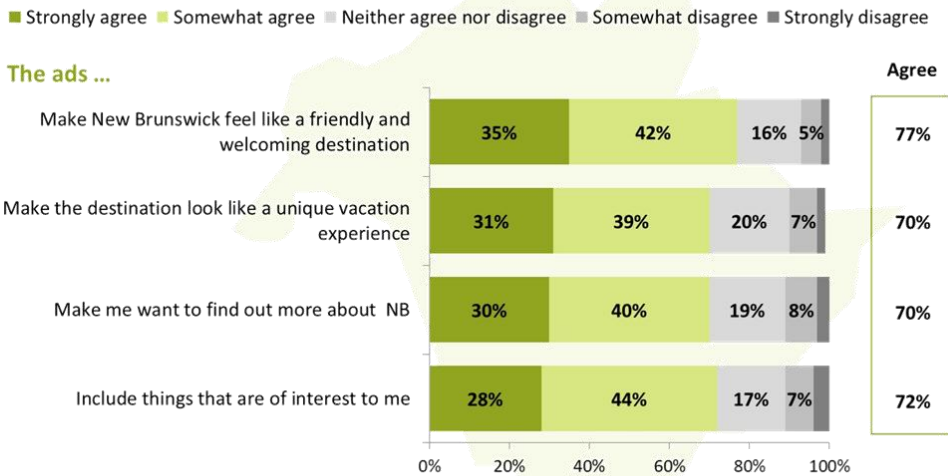


## New Brunswick Ad Evaluation

**Appealing**  
(Extremely/Very)



**Yes,  
Motivating**



Generally, appeal is consistent across demographics; however, younger US travellers are more likely to report the ads motivate them to visit New Brunswick in the future (18-34: 81%, 35-54: 75%, 55-75: 67%).

Q.35: Please indicate how appealing the ads make [NEW BRUNSWICK] as a place to visit on vacation. (n=2,415) | Q.36: Do these ads motivate you to want to travel to [NEW BRUNSWICK] in the future? (n=2,415) | Q.37a, b, g, h: To what extent do you agree or disagree with each of the following statements about the ads for [NEW BRUNSWICK]? (n=2,415) Note: Mentions of 4% or less are represented by a bar.





# Ad Evaluation: Newfoundland & Labrador

The Newfoundland & Labrador ads hold strong appeal, with the bulk of US travellers finding them to be motivating and depictive of things of interest to them.

- Eight in ten US travellers find the NL ads to be **appealing**, with more than one-third (36%) finding them to be *extremely* appealing. Results show that appeal is consistent in both markets (New England: 79%; Mid-Atlantic: 78%).
- Three-quarters of travellers state these ads would **motivate them to travel to NL** in the future, with New England travellers being marginally more likely than Mid-Atlantic travellers to find the campaign motivating (79% vs. 75%).
- The NL campaign performed well across each of the attributes evaluated, with seven in ten each agreeing that the ads **make them want to visit NL, tell them you can do and see things in Newfoundland & Labrador that you can't elsewhere, make them want to find out more about NL, and include things that are of interest to them.** (Tables 35-37: NL)

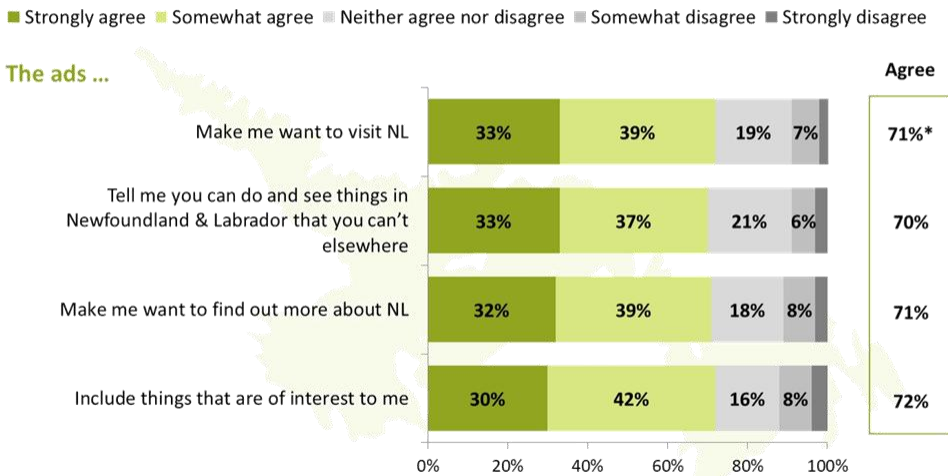


## Newfoundland & Labrador Ad Evaluation

**Appealing**  
(Extremely/Very)



**Yes,  
Motivating**



Across demographics, motivation to travel to Newfoundland & Labrador is stronger among younger travellers (18-34: 82%, 35-54: 78%, 55-75: 66%). Otherwise, results are generally consistent across markets.

Q.35: Please indicate how appealing the ads make [NEWFOUNDLAND & LABRADOR] as a place to visit on vacation. (n=2,415) | Q.36: Do these ads motivate you to want to travel to [NEWFOUNDLAND & LABRADOR] in the future? (n=2,415) | Q.37a-d: To what extent do you agree or disagree with each of the following statements about the ads for [NEWFOUNDLAND & LABRADOR]? (n=2,415) Note: Mentions of 4% or less are represented by a bar. \*Due to rounding.





# Ad Evaluation: Nova Scotia

The Nova Scotia campaign is largely considered appealing and motivating, showcasing the proximity of the ocean and positively influence likelihood of travelling to the province.

- Three-quarters of US travellers find the NS ads to be **appealing**, with one-third (33%) indicating they are *extremely* appealing. Those in New England are marginally more likely than travellers from the Mid-Atlantic to find the ads appealing (79% vs. 72%).
- Seven in ten (72%) US travellers feel these ads would **motivate them to travel to NS** in the future, with those from New England being more likely to be motivated by these ads (78% vs. 69%).
- The NS campaign performed well across each statement evaluated. Indeed, seven in ten travellers agree that the ads show that *in NS, they'll never be far from the ocean or its influence*, while two-thirds agree the ads show that *NS is Canada's essential seacoast destination*, or the ads *make them want to find out more about NS* and *include things that are interest to them*. (Tables 35-37: NS)



## Nova Scotia Ad Evaluation

**Appealing**  
(Extremely/Very)

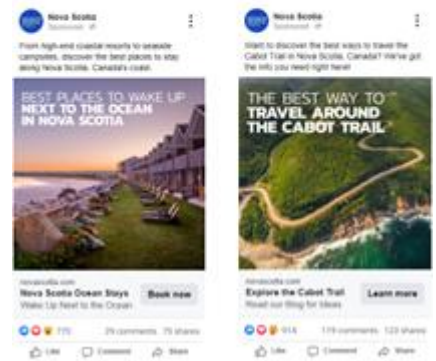
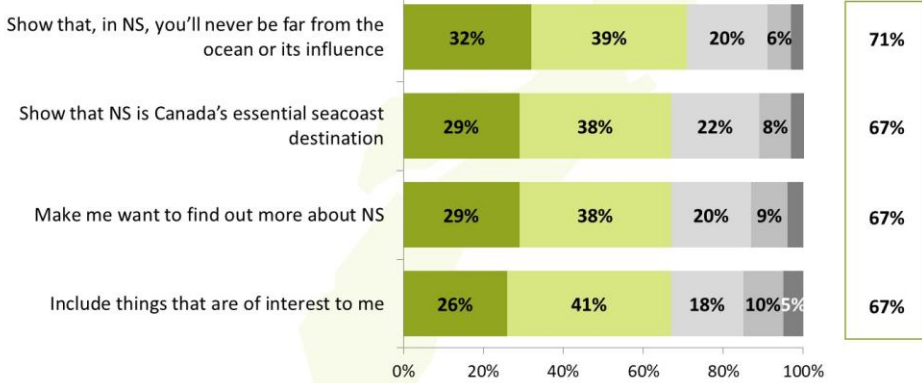


**Yes,  
Motivating**



Legend: Strongly agree (dark green), Somewhat agree (light green), Neither agree nor disagree (grey), Somewhat disagree (light grey), Strongly disagree (dark grey)

### The ads ...



Q.35: Please indicate how appealing the ads make [NOVA SCOTIA] as a place to visit on vacation. (n=2,415) | Q.36: Do these ads motivate you to want to travel to [NOVA SCOTIA] in the future? (n=2,415)  
 | Q.37a, b, e, f: To what extent do you agree or disagree with each of the following statements about the ads for [NOVA SCOTIA]? (n=2,415) Note: Mentions of 4% or less are represented by a bar.

Across the attributes assessed, results were generally consistent across US markets. That said, again younger travellers are more likely to express motivation to travel to NS (18-34: 80%, 35-54: 74%, 55-75: 59%).

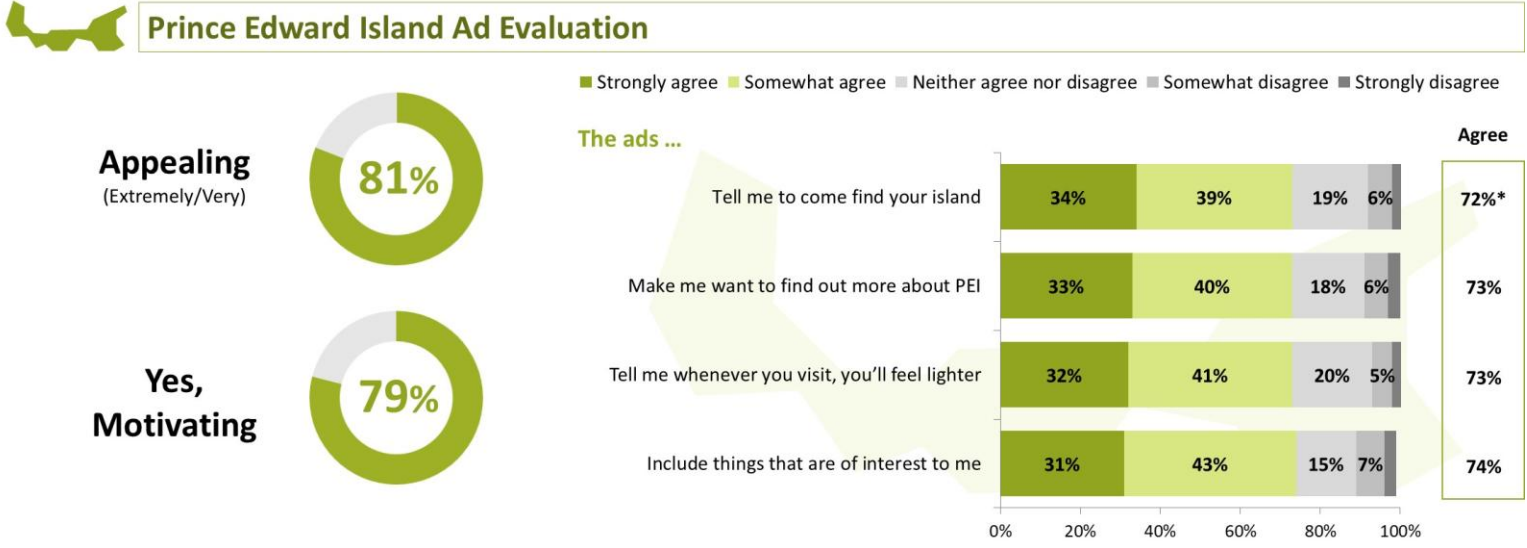




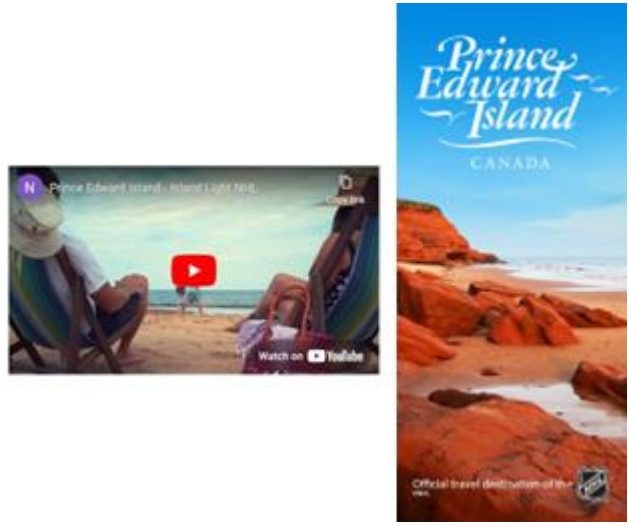
# Ad Evaluation: Prince Edward Island

The PEI ads hold strong appeal and are considered motivating and positively influence a desire to learn more about the province.

- Eight in ten US travellers find the PEI ads to be **appealing**, with nearly four in ten (37%) deeming them to be *extremely* appealing. Identical proportions of New England and Mid-Atlantic travellers find the ads to be appealing (81% each).
- Eight in ten feel these ads would **motivate them to travel to PEI** in the future (79%), with similar proportions from each market expressing motivation to travel to PEI (New England: 81%; Mid-Atlantic: 78%).
- The PEI campaign performed very well across presented attributes, with three-quarters agreeing the ads **include things that are of interest to them**, with similar proportions agreeing the ads **make them want to find out more about PEI, tell them whenever they visit, they'll feel lighter, and tell me to come find your island.** (Tables 35-37: PEI)



Q.35: Please indicate how appealing the ads make [PRINCE EDWARD ISLAND] as a place to visit on vacation. (n=2,415) | Q.36: Do these ads motivate you to want to travel to [PRINCE EDWARD ISLAND] in the future? (n=2,415) | Q.37a, b, i, j: To what extent do you agree or disagree with each of the following statements about the ads for [PRINCE EDWARD ISLAND]? (n=2,415) 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. That said, those 55 to 75 years are slightly less likely than their younger counterpart to find the ads to be motivating (55-75: 70% vs. 18-34: 84% and 35-54: 80%).

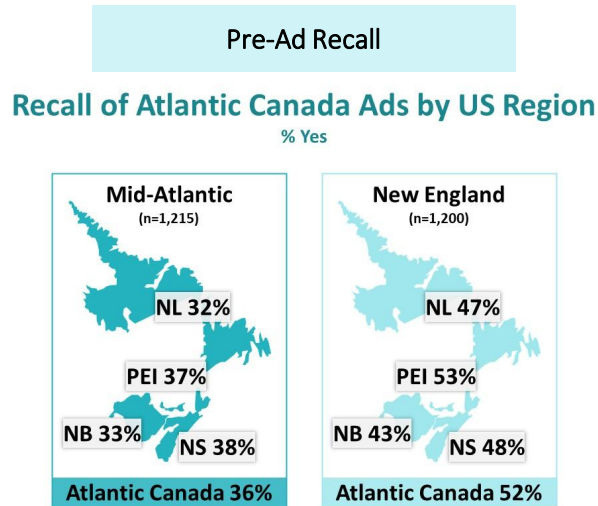


# Likelihood to Consider Atlantic Canada After Seeing Ads

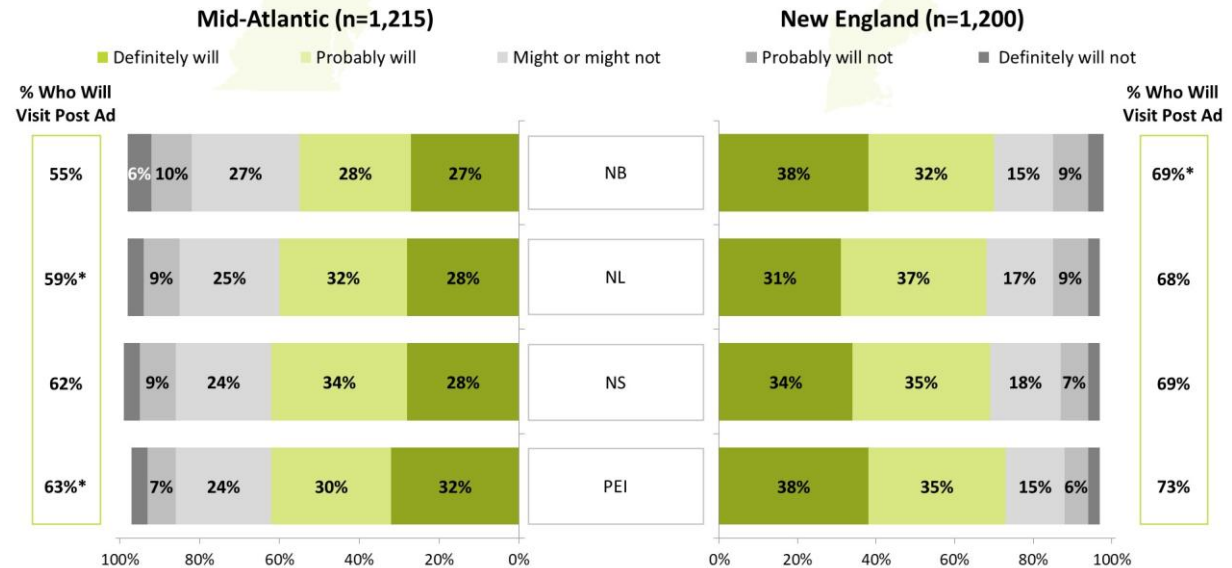
Exposure to each of the ads positively impacts the likelihood of visiting each Atlantic province.

To gauge the potential impact these ads would have on influencing travellers' propensity to visit Atlantic Canada provinces, 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.

- Findings show that the ads positively influence travellers' likelihood of taking a pleasure trip to each of the Atlantic Canadian provinces. Indeed, more than one-half of Mid-Atlantic residents and seven in ten New England travellers report some likelihood of travelling to each of the provinces in the next two years, *after* seeing the ads.
- Overall, younger travellers, those with children in the household, those with higher levels of education, and those with higher annual household incomes are more likely than their respective counterparts to report some likelihood of travelling to each Atlantic province. (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?  
 Note: Mentions of 4% or less are represented by a bar. \*Due to rounding.



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

Collectively, the ads positively influence the likelihood of travelling to the Atlantic Canada region, inspiring greater visitation to multiple provinces.

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

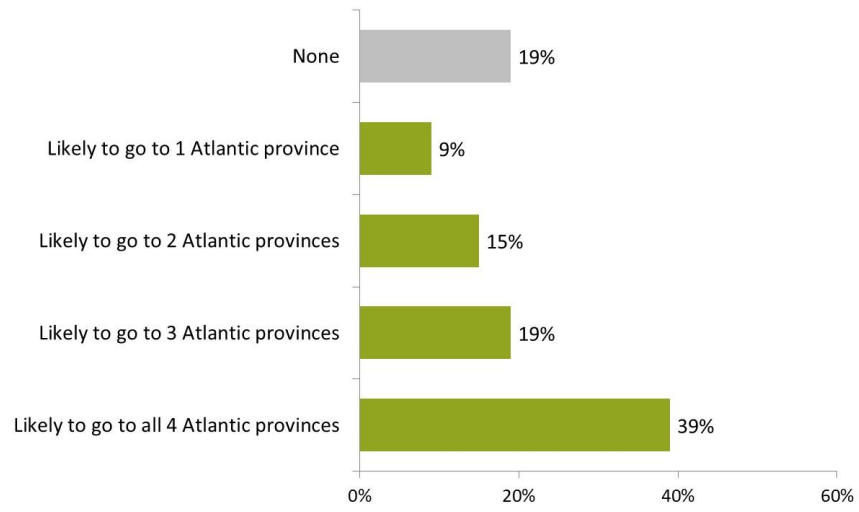
- Overall, travelers' inclination to visit Atlantic Canada after exposure to the ads remains generally consistent, with their likelihood of visiting up marginally post ad exposure (81% vs. 79% pre-ad exposure). That said, the likelihood of taking a pleasure trip to **all 4 Atlantic provinces** increases notably post-ad-exposure (39%; up 9 points from pre-ad exposure).
- Across markets, those from the New England region are more likely than those from the Mid-Atlantic region to state they will *definitely* or *probably* take a pleasure trip to at least one Atlantic province after seeing the ads (88% vs. 79%, respectively). (Table 38a-d combined)

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



### Likely to Visit Atlantic Canada

% Definitely/Probably Would Consider Visiting Post Ads



Interestingly, among those who did not express clear interest in taking a pleasure trip to Atlantic Canada pre-ad (21%) (i.e., did not indicate they would definitely or probably consider visiting at least one Atlantic Canada province), 43% stated they would *definitely/probably* take a pleasure trip to at least one Atlantic Province after seeing the ad.

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? (n=2,415)









# Likelihood to Consider Atlantic Canada After Seeing Ads – By Province

Each campaign positively influences travel intentions to the respective province, particularly for Newfoundland & Labrador and Prince Edward Island.

- When looking at each of the Atlantic Canada provinces, it is clear the ads had a positive impact on US travellers' likelihood of visiting each one. Overall, the greatest impact of the ad exposure is regarding US travellers indicating they *definitely* or *probably* will visit **Newfoundland and Labrador** in the next two years (62%; up 9 points), closely followed by **Prince Edward Island** (66%: up 7 points). That said, upward trends are also noted for **New Brunswick** (59%; up 5 points) and **Nova Scotia** (64%; up 4 points). Of note, instances of 'definitely' visiting each province increased by at least 5 points per province post ad exposure.
- Of note, those from New England more commonly express a likelihood of considering **New Brunswick** than those from the Mid-Atlantic (69% vs. 55%, respectively), as well as **Prince Edward Island** (73% vs. 63%) and **Newfoundland and Labrador** (68% vs. 59%).
- The number of travellers who stated, pre-ad, that they would *definitely/probably not* consider Atlantic Canada, declined post-ad for **Newfoundland & Labrador** and **Prince Edward Island**. (Tables 25a-d and 38a-d)

## Likelihood to Consider Atlantic Canada Pre and Post Ad Exposure

	 NB	 NL	 NS	 PEI				
	Pre-Ad	Post-Ad	Pre-Ad	Post-Ad	Pre-Ad	Post-Ad	Pre-Ad	Post-Ad
Definitely/Probably	54%	<b>59%</b>	53%	<b>62%</b>	60%	<b>64%</b>	59%	<b>66%</b>
Might/Might not	31%	<b>23%</b>	30%	<b>23%</b>	28%	<b>22%</b>	28%	<b>21%</b>
Definitely/Probably not	15%	<b>15%</b>	17%	<b>13%</b>	12%	<b>12%</b>	14%	<b>10%</b>

Q.25a-d: 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.). (n=2,415) | 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? (n=2,415)



# Motivating Factors to Visit: New Brunswick

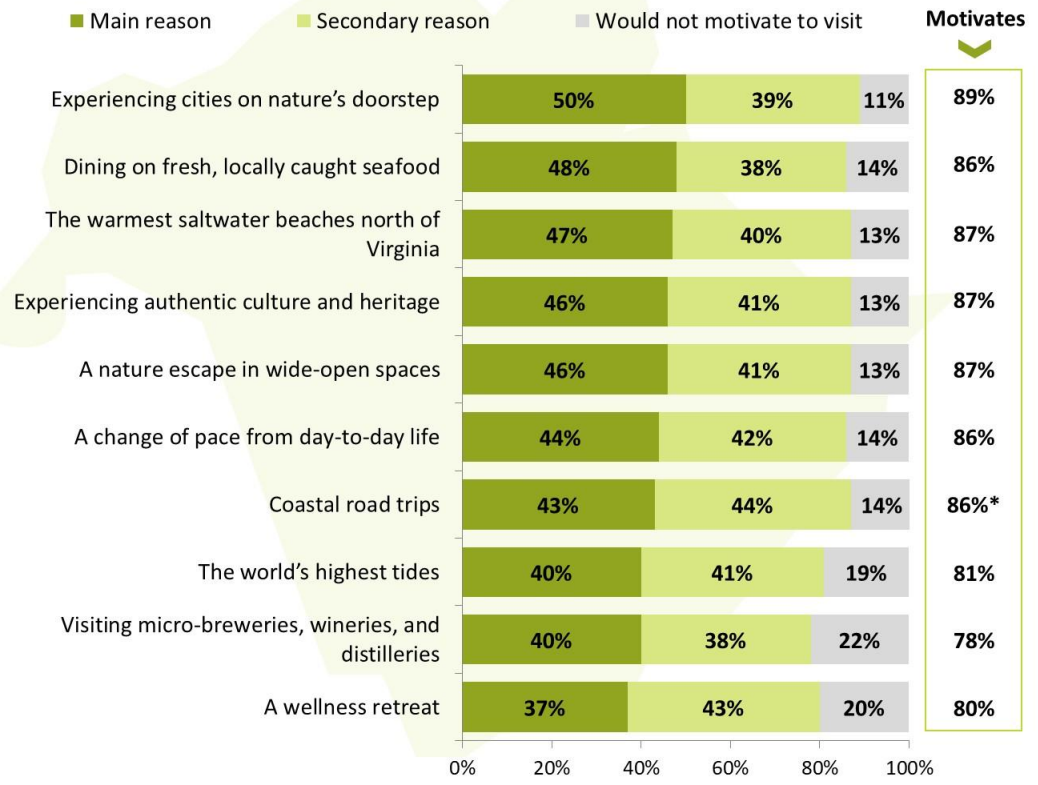
All factors are considered strong motivators to visit New Brunswick.

After each provincial campaign was shown, US travellers were 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 that province.

## New Brunswick

- Overall, each motivating factor is enticing to eight in ten or more US travellers. That said, one-half cite *experiencing cities on nature's doorstep* and *dining on fresh, locally caught seafood* as the main reasons for visiting New Brunswick.
- Having the warmest saltwater beaches north of Virginia, experiencing authentic culture and heritage, a nature escape in wide-open spaces, a change of pace from day-to-day life, coastal road trips, the world's highest tides*, and visiting micro-breweries, wineries and distilleries are each considered main motivators to at least four in ten US travellers overall, with slightly fewer consider a *wellness retreat* a main motivator.
- Across motivating factors, travellers from New England are more likely than those from the Mid-Atlantic to cite *the world's highest tides* (86% vs. 79%), *wellness retreats* (84% vs. 78%), and *visiting micro-breweries, wineries, and distilleries* (82% vs. 75%) as reasons to visit NB. At the same time, overall, those 55 to 75 years of age are less likely than their younger counterparts to cite each of these factors as motivators for visiting 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=2,415) \*Due to rounding.





# Motivating Factors to Visit: Newfoundland & Labrador

All factors are considered great motivators for visits to Newfoundland & Labrador in the future.

## Newfoundland & Labrador

- Eight in ten or more US travellers report each factor would be motivating in visiting Newfoundland and Labrador, including more than one half who cite **visiting charming coastal towns and fishing villages** (54%) as the *main* reason.
- At the same time, one-half of travellers report **enjoying unique culinary experiences** and **watching whales, puffins and other marine life from land and boat tour** as being a primary motivator for visiting the province, while slightly fewer feel this way about **seeing icebergs from land and boat tours** and **having the opportunity to relax and unwind in uncrowded open spaces**. All other factors assessed are considered main factors for visiting Newfoundland & Labrador by roughly four in ten US travellers.
- Across markets, New England travellers are slightly more likely than Mid-Atlantic travellers to consider **visiting charming coastal towns and fishing villages** (94% vs. 89%), **having the opportunity to take in Indigenous experiences** (87% vs. 82%), and **visiting UNESCO World Heritage Sites** (86% vs. 82%) as motivating factors for visiting Newfoundland & Labrador.
- Overall, travellers 55 to 75 are less likely than their younger counterparts to cite **great hiking and trail walking opportunities**, **taking in Indigenous experiences**, **visiting UNESCO World Heritage Sites**, and **enjoying unique culinary experiences** as motivators for visiting the province. (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=2,415) \*Due to rounding.





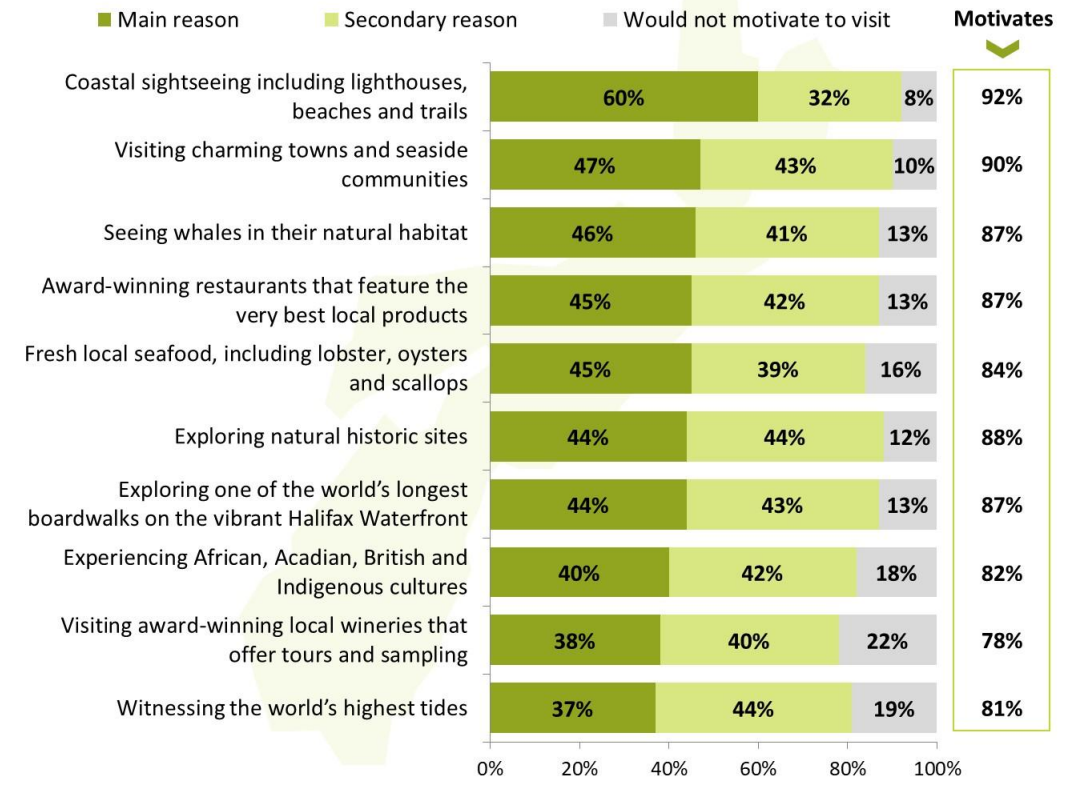
# Motivating Factors to Visit: Nova Scotia

Coastal sightseeing including lighthouses, beaches and trails are the foremost drivers for future visits to Nova Scotia, though other factors are very motivating as well.

## Nova Scotia

- Similar to other provinces, eight in ten or more travellers state that each factor is considered a motivation for visiting Nova Scotia, with six in ten travellers cite **coastal sightseeing including lighthouses, beaches, and trails** as the *main* reason for visiting Nova Scotia.
- All other factors motivating visitation are deemed to be key drivers by more than one-third of travellers each including nearly one-half who each state **visiting charming towns and seaside communities** and **seeing whales in their natural habitat** as main reasons.
- Across markets, New England travellers are more likely than Mid-Atlantic travellers to cite **witnessing the world's highest tides** (86% vs. 79%) and **visiting award-winning local wineries that offer tours and sampling** (83% vs. 76%) as motivating factors to visiting Nova Scotia.
- Overall, travellers 55 to 75 are less likely than their younger counterparts to find **experiencing different cultures**, visiting **award-winning local wineries**, and **witnessing the world's highest tides** to be motivators to visiting the province. (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=2,415)



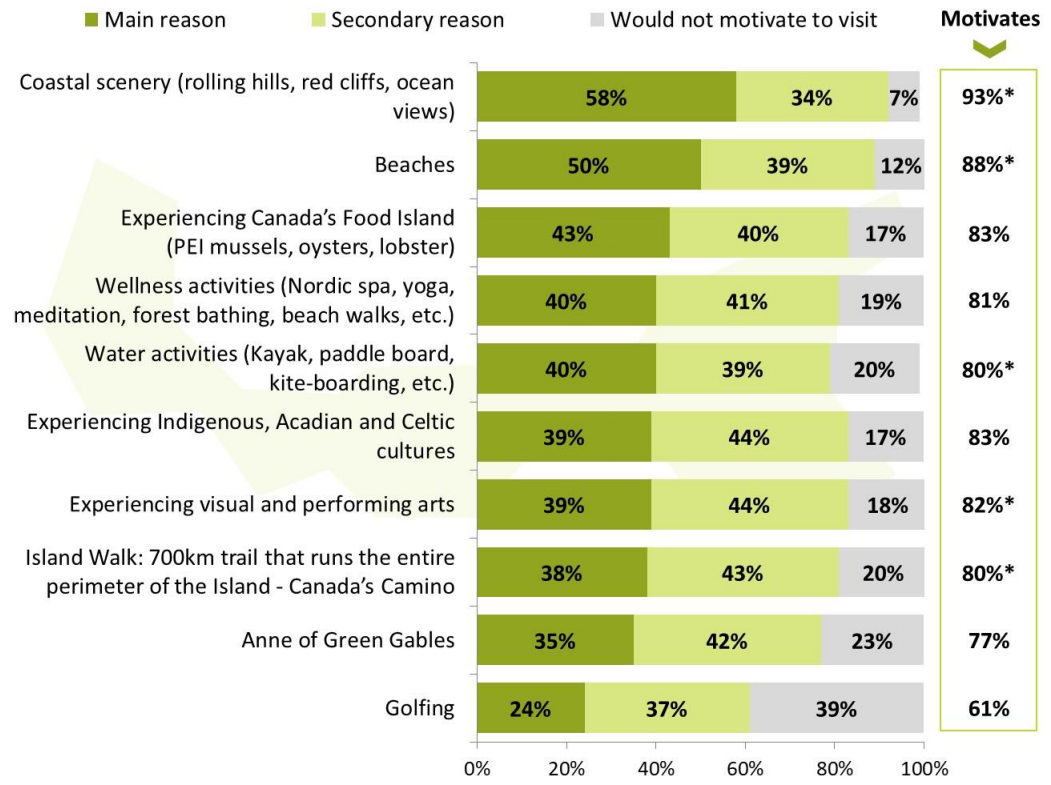
# Motivating Factors to Visit: Prince Edward Island

Coastal scenery is considered the greatest motivator for visiting PEI in the future, along with a wide variety of other factors including beaches.

## Prince Edward Island

- At least six in ten US travellers cite each factor as a motivator for future visits to Prince Edward Island. That said, six in ten find the Island’s *coastal scenery (rolling hills, red cliffs, ocean views)* to be a main reason for visiting, while one-half cite its *beaches* as being a main reason.
- More than four in ten report *experiencing Canada’s Food Island* as a main reason to visit, while slightly fewer would be primarily motivated by *wellness activities, water activities, experiencing various cultures, experiencing visual and performing arts*, and the *Island Walk*.
- Approximately one-third of US travellers consider *Anne of Green Gables* to be a main reason for visiting, while one-quarter would consider *golfing* to be a main reason to come to Prince Edward Island.
- Across markets, those living in New England are notably more likely than those living in Mid-Atlantic to be motivated by *Island Walk* (85% vs. 78%), *water activities* (85% vs. 77%), *Anne of Green Gables* (82% vs. 75%), and *golfing* (74% vs. 55%).
- Overall, the likelihood of identifying each factor as motivator for visiting the Island decreases with age, especially with regards to *golfing, Anne of Green Gables, water activities, the Island Walk*, and *wellness activities*.
- Perhaps unsurprisingly, men and those with higher annual household incomes are also 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=2,415) \*Due to rounding.





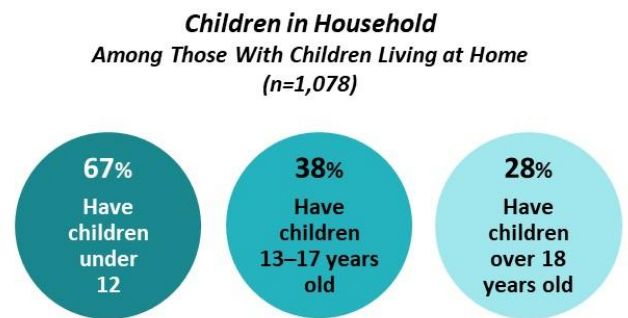
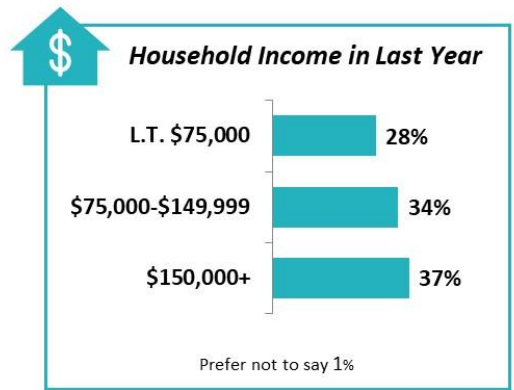
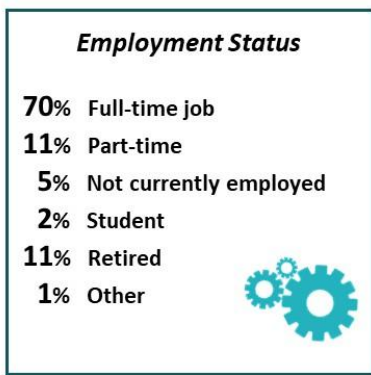
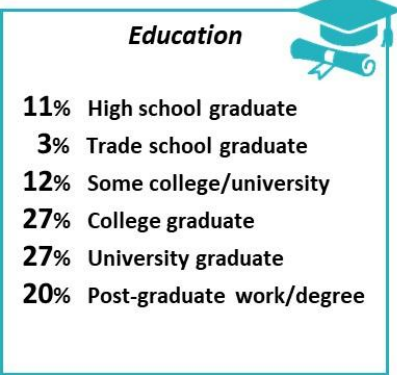
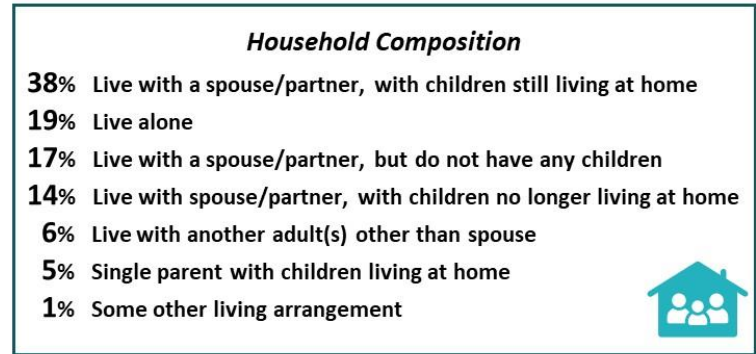
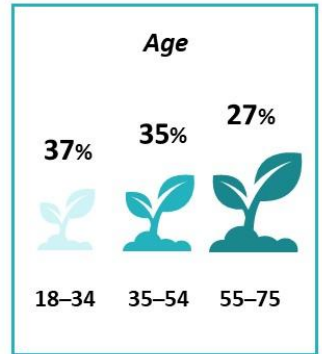
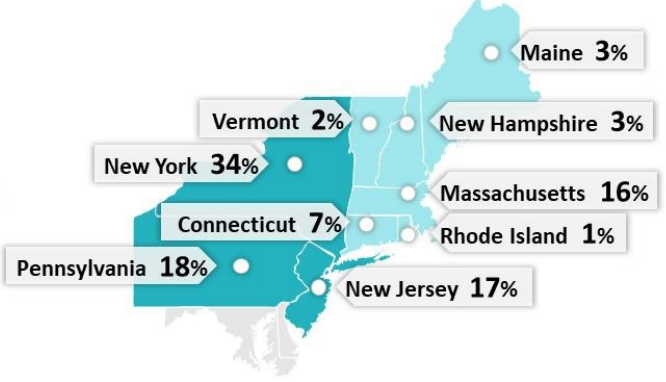
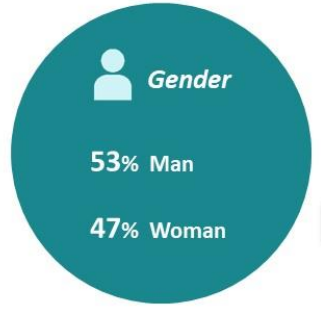
# Respondent Profile

*The following outlines the demographic and regional breakdown of respondents.*



# Respondent Profile

The following provides a profile of survey respondents (n=2,415).



every insight tells a story.

