

**NARRATIVE**  
RESEARCH

# 2025 UK Consumer Research *Presentation*

June 2025

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.*



# Methodology



## Key Objectives

To gain market insights into UK travellers, particularly:

- Awareness, familiarity with Canada/Atlantic Canada
- Barriers/perceived obstacles for travel to Atlantic Canada/provinces;
- Motivating factors to visit Atlantic Canada/provinces;
- Destination appeal, ad/creative evaluation and impact of ad exposure on likelihood to visit.



## Pre-qualifiers

- Must hold a valid passport, AND:
  - Have taken at least one long-haul leisure trip of at least 4 nights outside the UK 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 2 years.
- Half must have travelled to Canada in the past 3 years.



**Mode:** Online survey



**Audience:** Long-haul travellers from the United Kingdom



**Completes:** **1,206** travellers  
( 604 who had visited Canada in the past 3 years & 602 who had not)



**Data Collection Dates:**  
March 7 - 16, 2025



**Average Completion Time:**  
14.5 minutes



# Respondent Profile

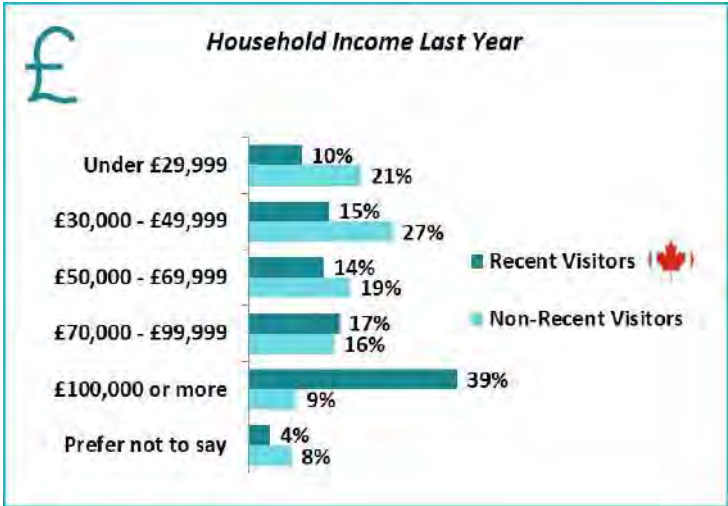
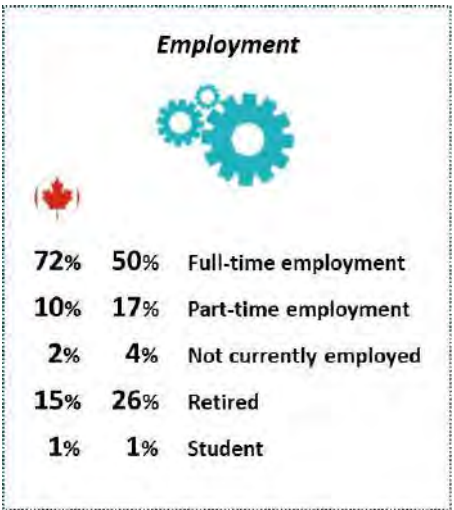
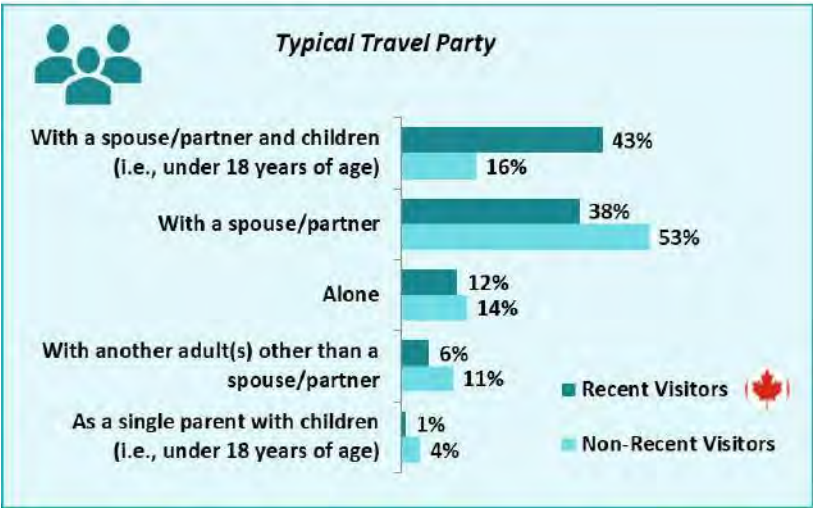
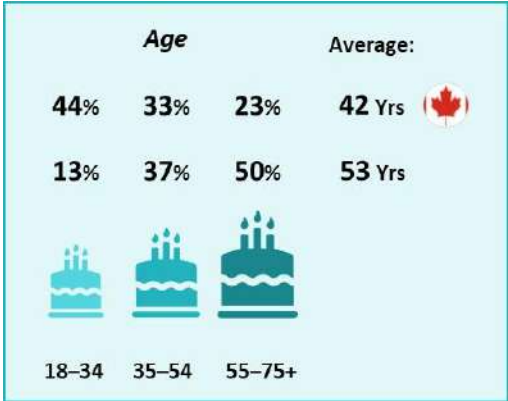
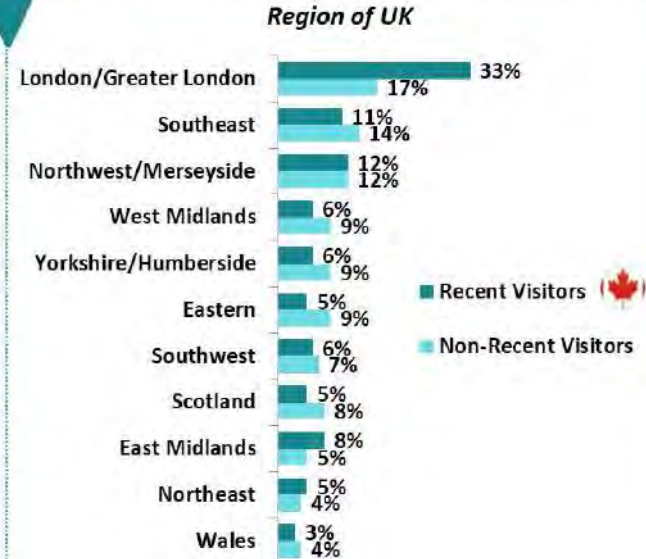
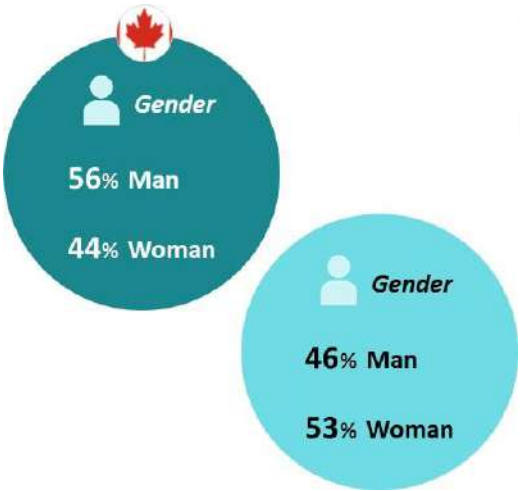


# Recent visitors to Canada tend to be younger, more likely to travel with a spouse/partner/family, employed full-time, and more affluent than non-recent visitors.



Recent Visitors to Canada (n=604)

Non-Recent Visitors (n=602)







# Travel Activities



UK travellers are well-travelled, with recent visitors to Canada having taken more frequent long-haul trips than non-recent visitors to Canada in the past three years.



**5.9**

*Trips taken  
on average  
among recent  
visitors to  
Canada*

vs.

**3.4**

*Trips taken  
on average  
among  
non-recent  
visitors*

UK travellers who have visited Canada in the past three years have explored more than twice as many different long-haul destinations than non-recent visitors to Canada.



## Destination Countries

Long-Haul Leisure Trips in the Past 3 Years

	Recent Visitors to Canada	Non-Recent Visitors
Canada	100%	0%
United States	57%	44%
Europe	40%	40%
Australia	30%	9%
United Arab Emirates	22%	9%
Japan	19%	6%
Mexico	15%	6%
Caribbean	13%	13%

**Average # of Destinations:**

**4.2**

**1.8**

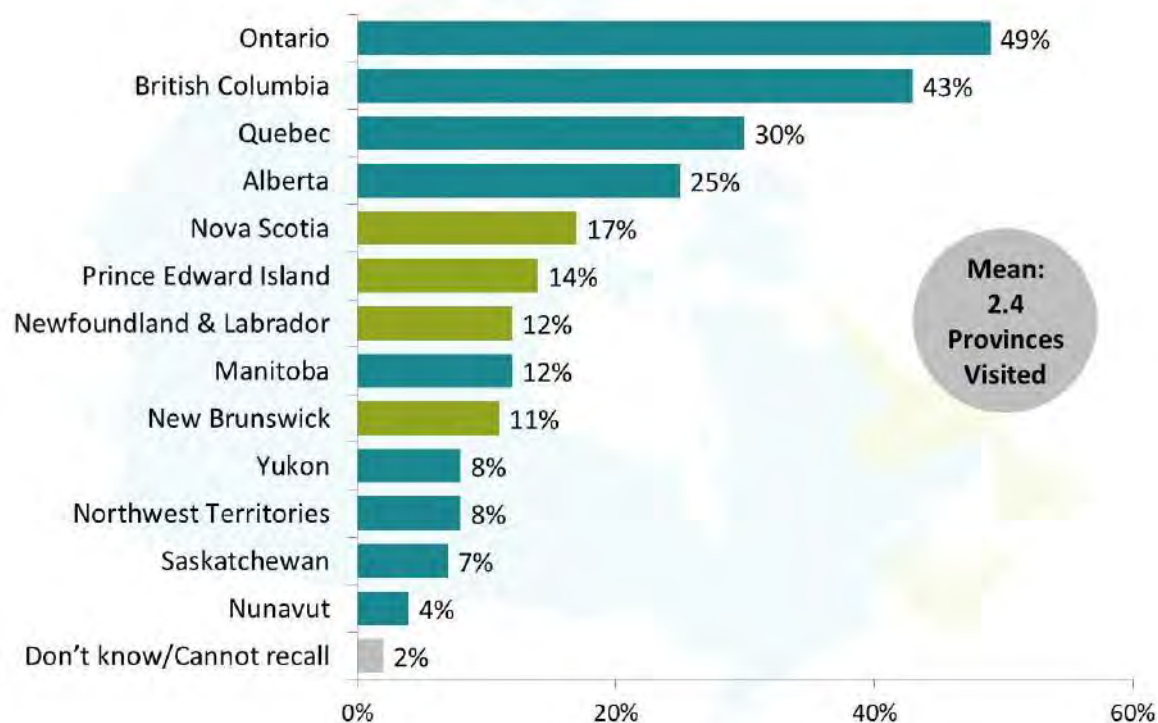


Ontario and BC, followed by Quebec and Alberta, are the top Canadian destinations for UK visitors, with visits to Atlantic Canada not far behind.

**50%**  
**Visited**  
**Canada**  
(per sample)

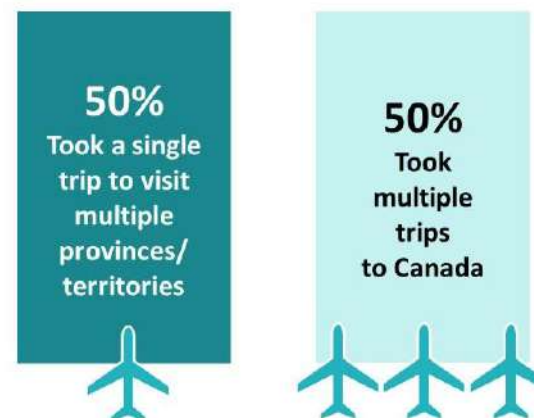
### Canadian Provinces Visited

In the Past 3 Years



### Single or Multiple Trips to Canada

In the Past 3 Years

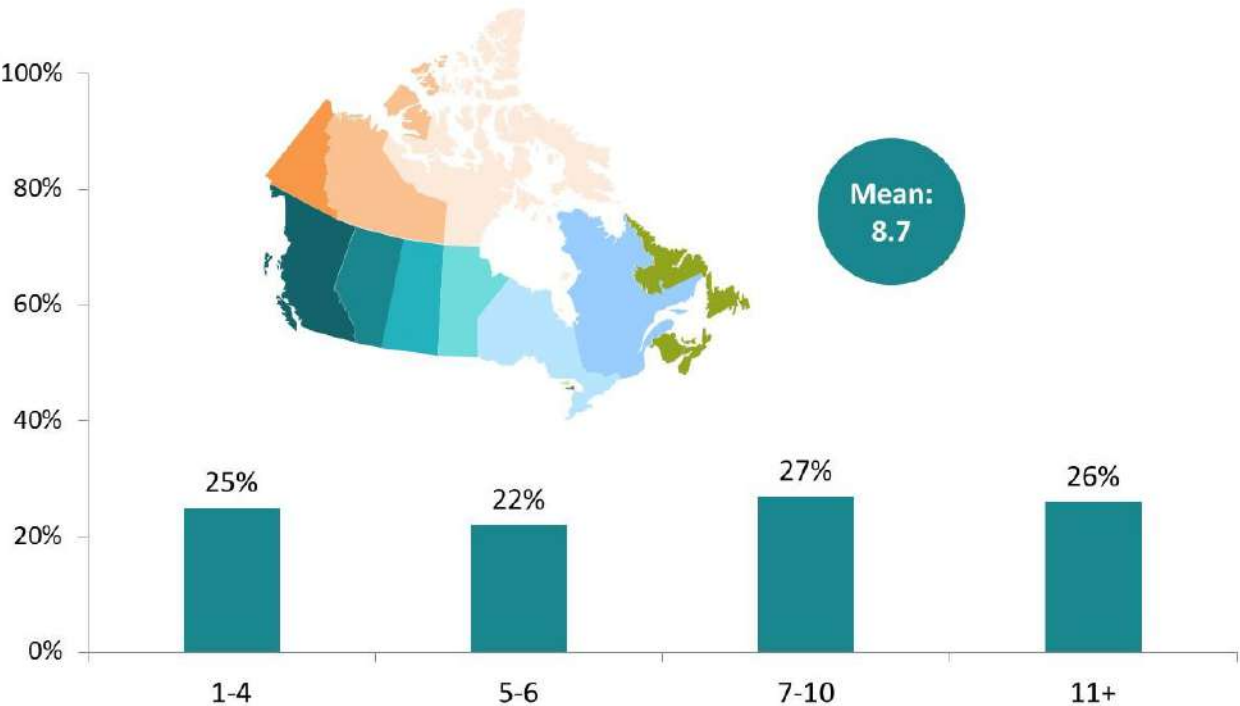




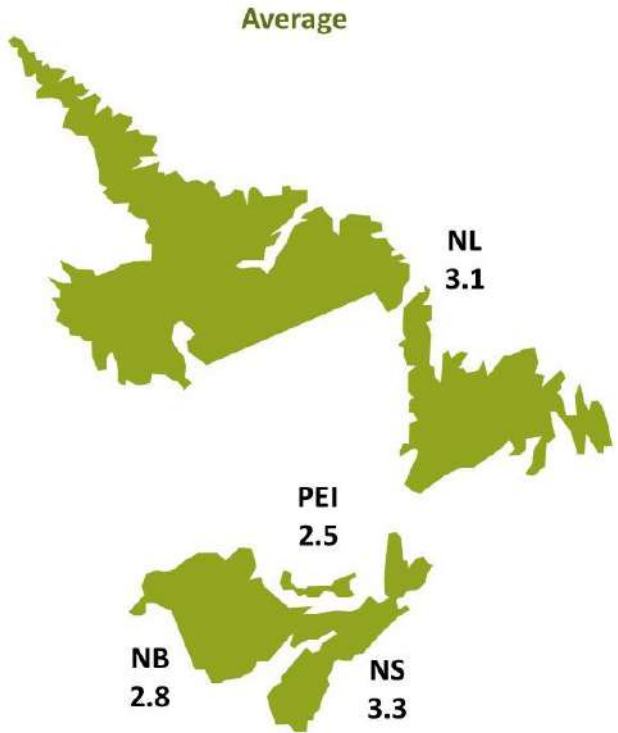


On average, UK visitors stayed more than a week in Canada. Those visiting Atlantic Canada spent, on average, approximately 2-3 nights in each respective Atlantic Canadian province they visited on their last trip.

Number of Nights in Canada on Last Trip







Number of Nights in Atlantic Canada on Last Trip





Reasons for visiting each Atlantic Canadian province are very similar, encompassing nature/ scenery and local history/cultural heritage, as well as a general sense of each province being a good destination.

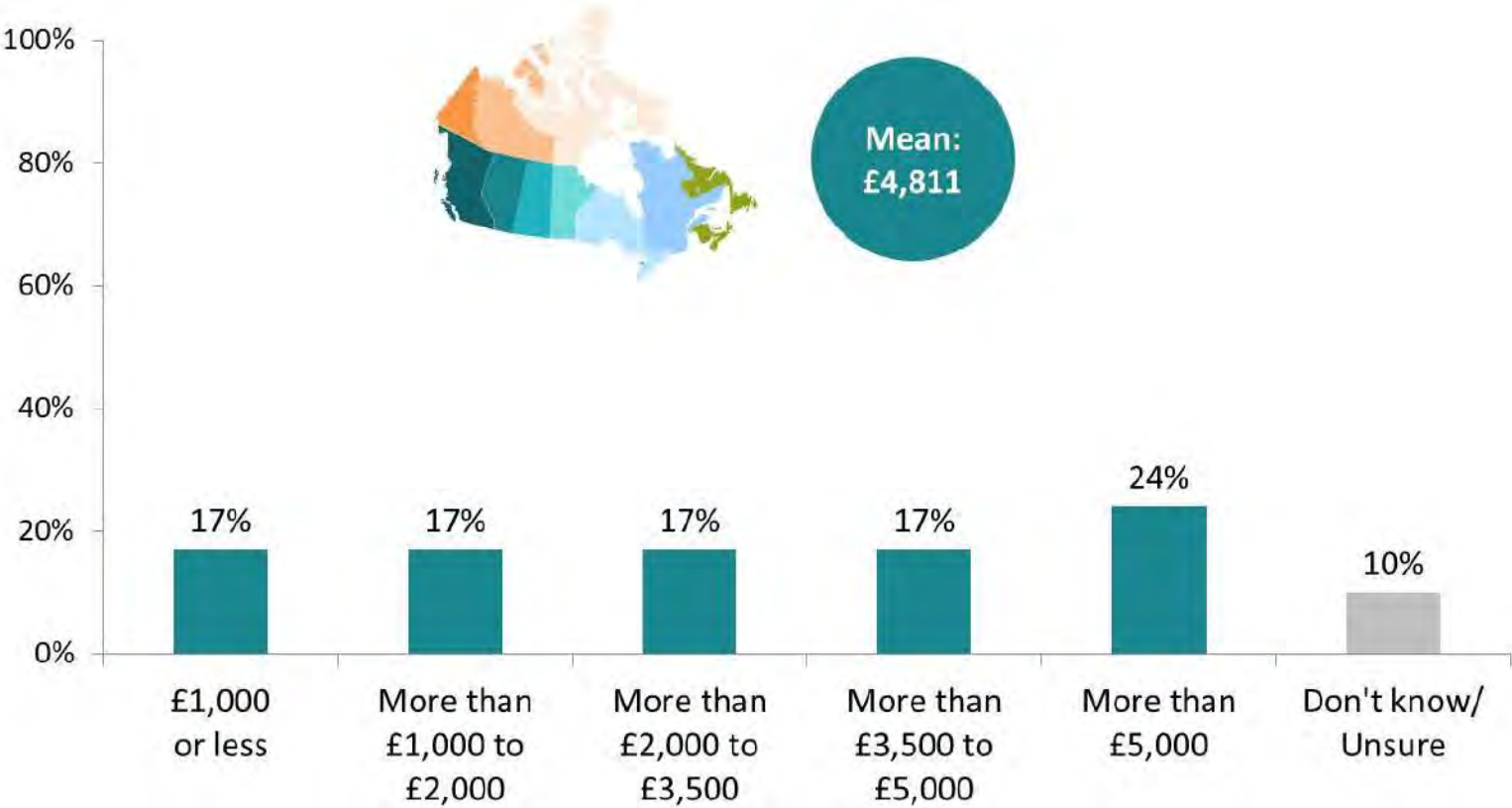
Reasons Visted Atlantic Canada

Top Unaided Mentions	 NB	 NL	 NS	 PEI
Sample size (n)	n=68	n=75	n=105	n=82
Good destination/I like it	31%	35%	32%	24%
Nature/Scenery	26%	27%	30%	34%
Local history/Cultural heritage	22%	27%	19%	26%
Reputation/Heard good things about it	13%	11%	14%	15%

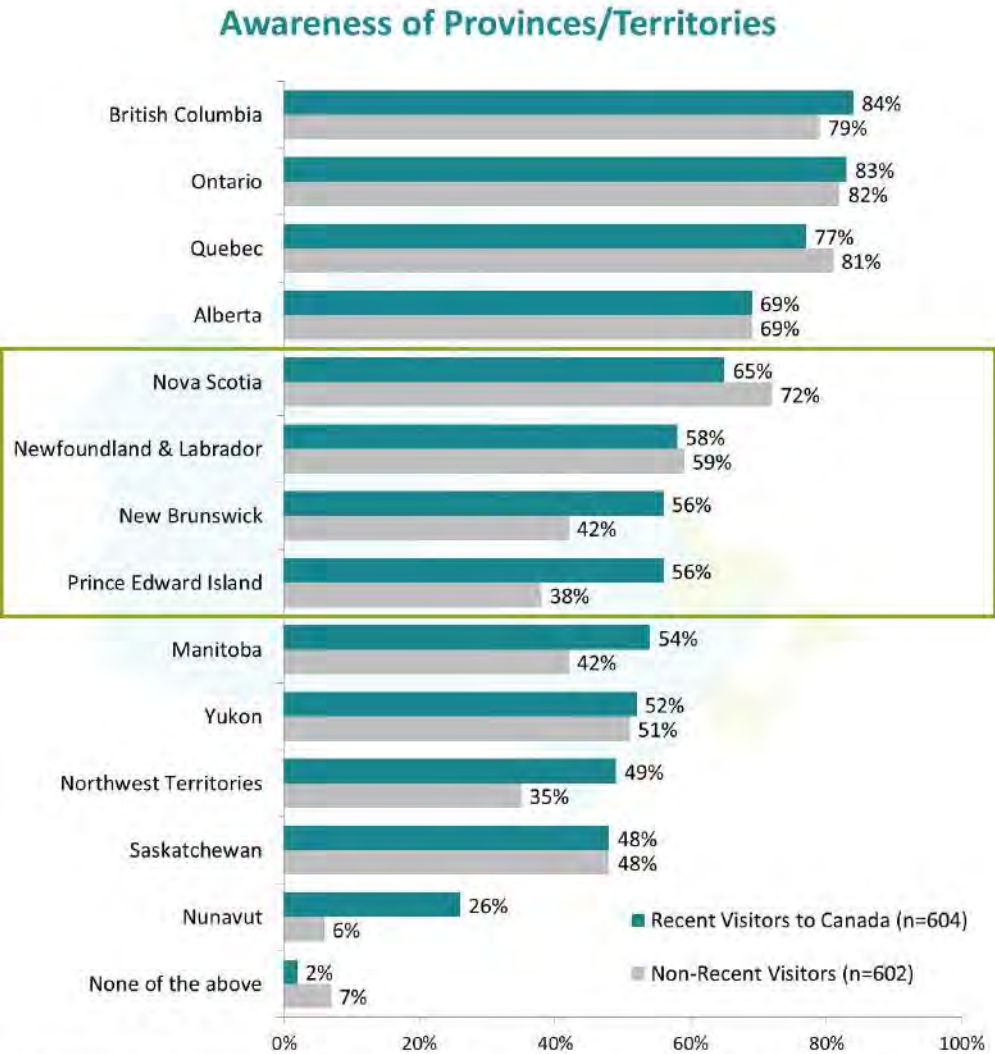


While there is considerable variation, the average budget for the last trip to Canada was £4,811.

Total Budget (£) for Last Trip to Canada



Ontario, British Columbia, and Quebec garner the highest levels of awareness among UK long-haul travellers, while awareness of the Atlantic Canadian provinces varies.



Q.17: [AMONG FULL BASE] Prior to this survey, which of the following provinces/territories in Canada, if any, have you ever heard of?



Recent visitation to Canada clearly influences UK travellers’ familiarity with what there is to see and do in each Atlantic Canadian province.

## Familiarity with What There Is to See and Do in Each Atlantic Province

% Very/Somewhat Familiar



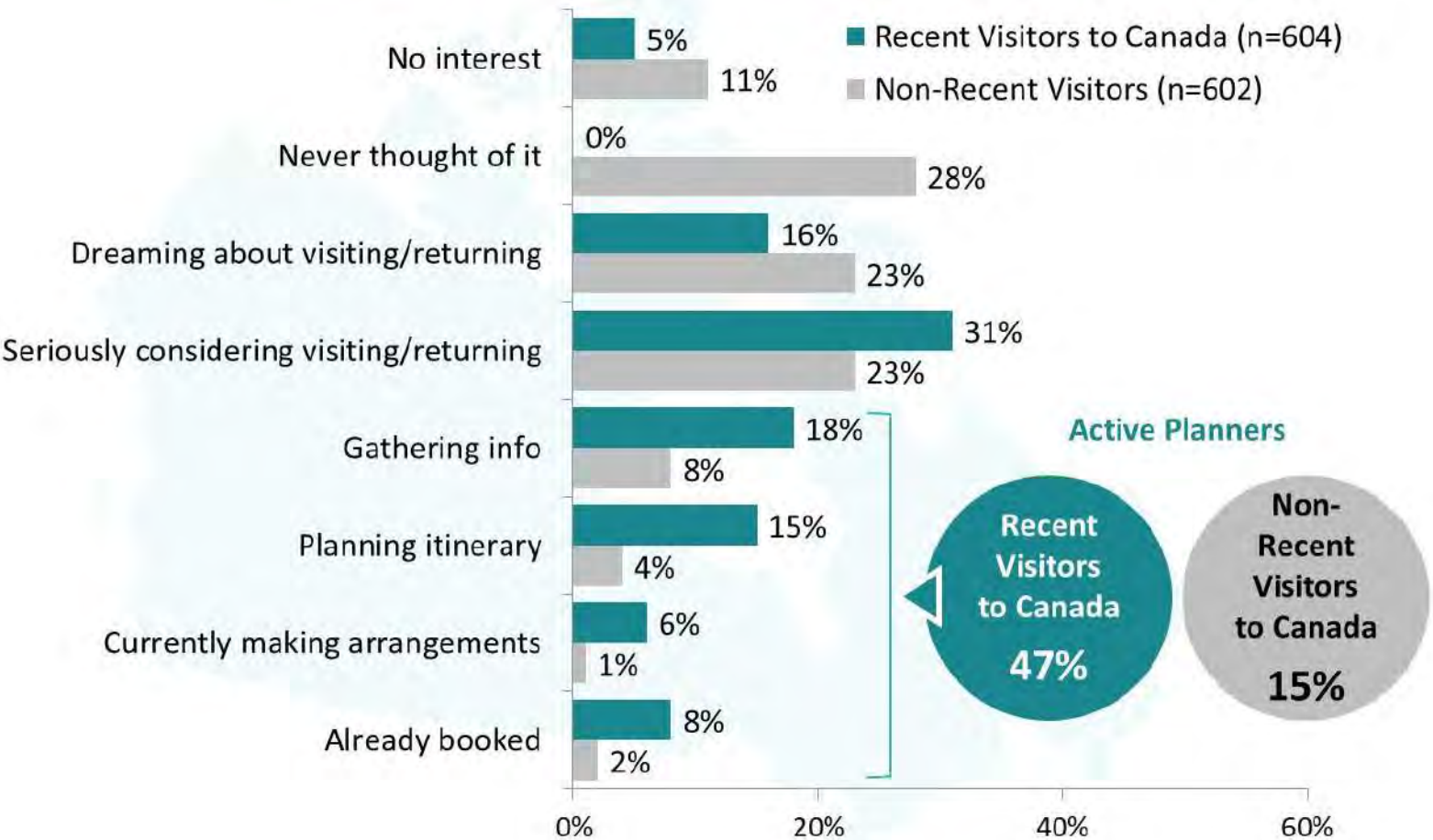
Province	Recent Visitors to Canada	Non-Recent Visitors
<b>NB</b>	<b>64%</b>	<b>21%</b>
(n=)	336	254
<b>NL</b>	<b>60%</b>	<b>22%</b>
(n=)	350	354
<b>NS</b>	<b>67%</b>	<b>23%</b>
(n=)	392	434
<b>PEI</b>	<b>69%</b>	<b>24%</b>
(n=)	337	229



# Travel Intentions

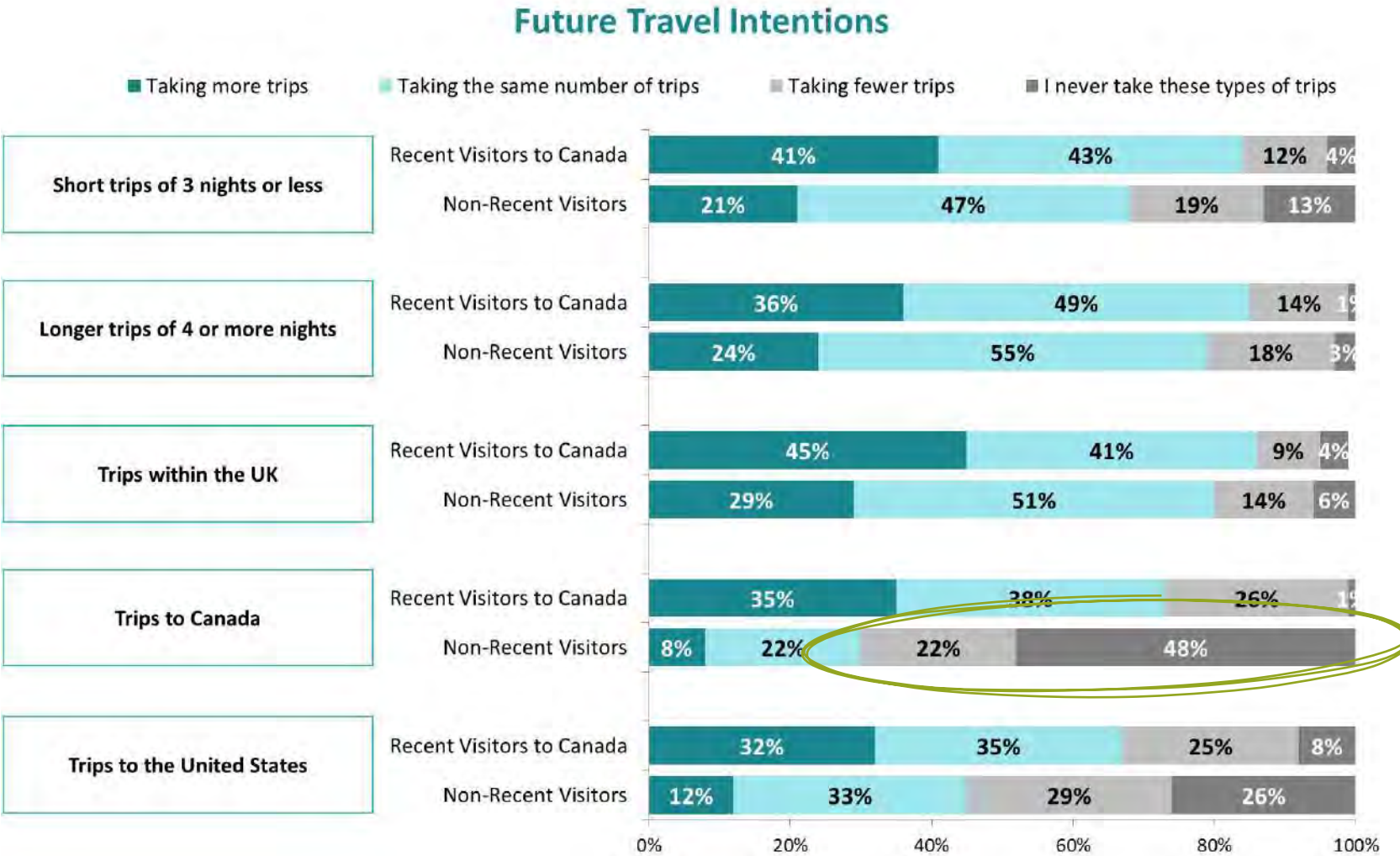
There is clear intention to visit Canada in the next two years, most notably among those who have recently visited Canada.

## Intentions to Visit Canada in Next 2 Years





UK travellers are most likely to say they plan to take the same or more trips this year than last, with few expecting to travel less. Notably, many non-recent visitors to Canada say they never travel to Canada.











There are strong intentions among recent visitors to Canada to consider visiting each Atlantic Canadian province.

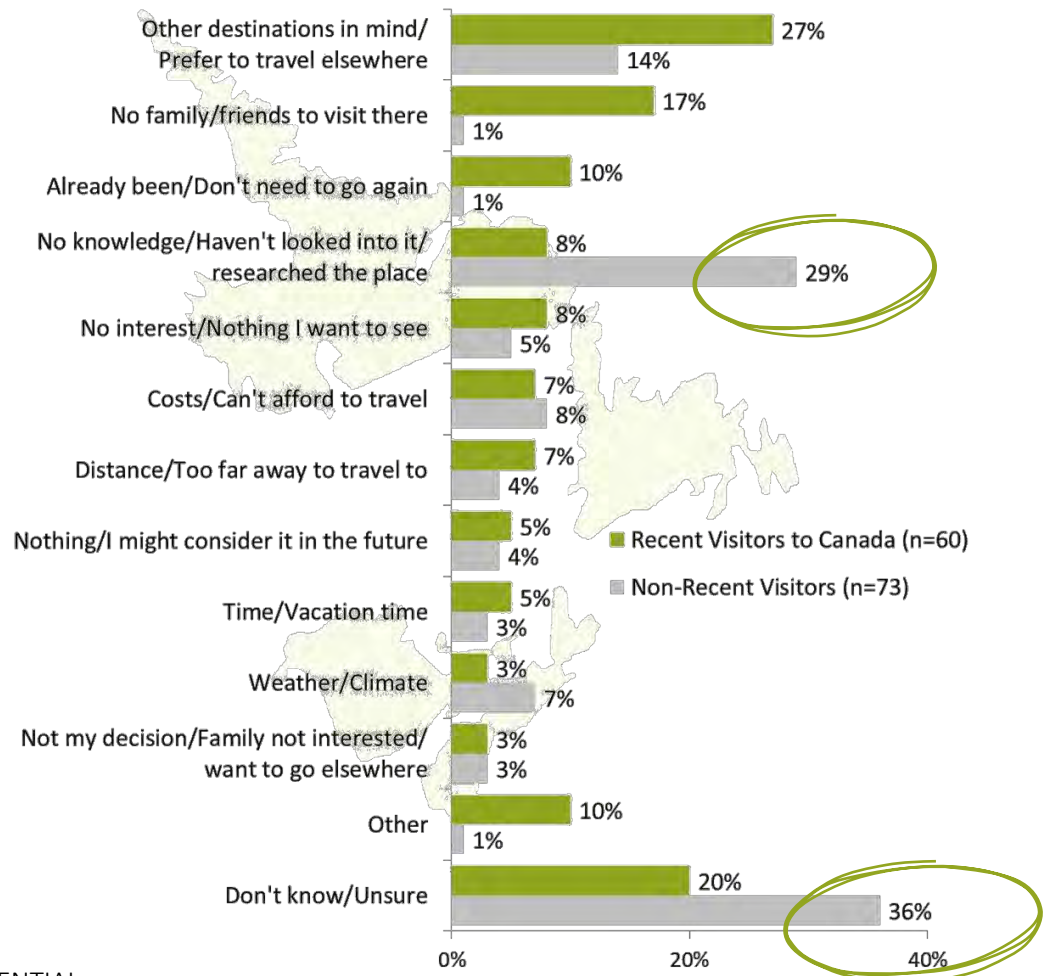
Likely to Consider Visiting in the Next 2 Years

Pre-Ad Full Base	 NB				 NL				 NS				 PEI			
	Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors		Recent Visitors to Canada		Non-Recent Visitors	
	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule	%	80/20 Rule
Likely	68%*	36%	28%	11%*	70%	35%*	31%	13%	74%*	40%*	32%*	15%	73%	41%	28%	12%
Definitely	38%	30%	10%	8%	36%	29%	12%	9%	41%	33%	14%	11%	44%	35%	11%	9%
Probably	29%	6%	18%	4%	34%	7%	19%	4%	32%	6%	19%	4%	29%	6%	17%	3%

To provide a more conservative estimate of visitation, an 80/20 rule was applied.

Among the few barriers mentioned, a preference for travelling elsewhere and lack of knowledge of Atlantic Canada are top reasons for not considering Atlantic Canadian provinces as a vacation destination.

### Barriers to Considering Atlantic Provinces as a Vacation Destination

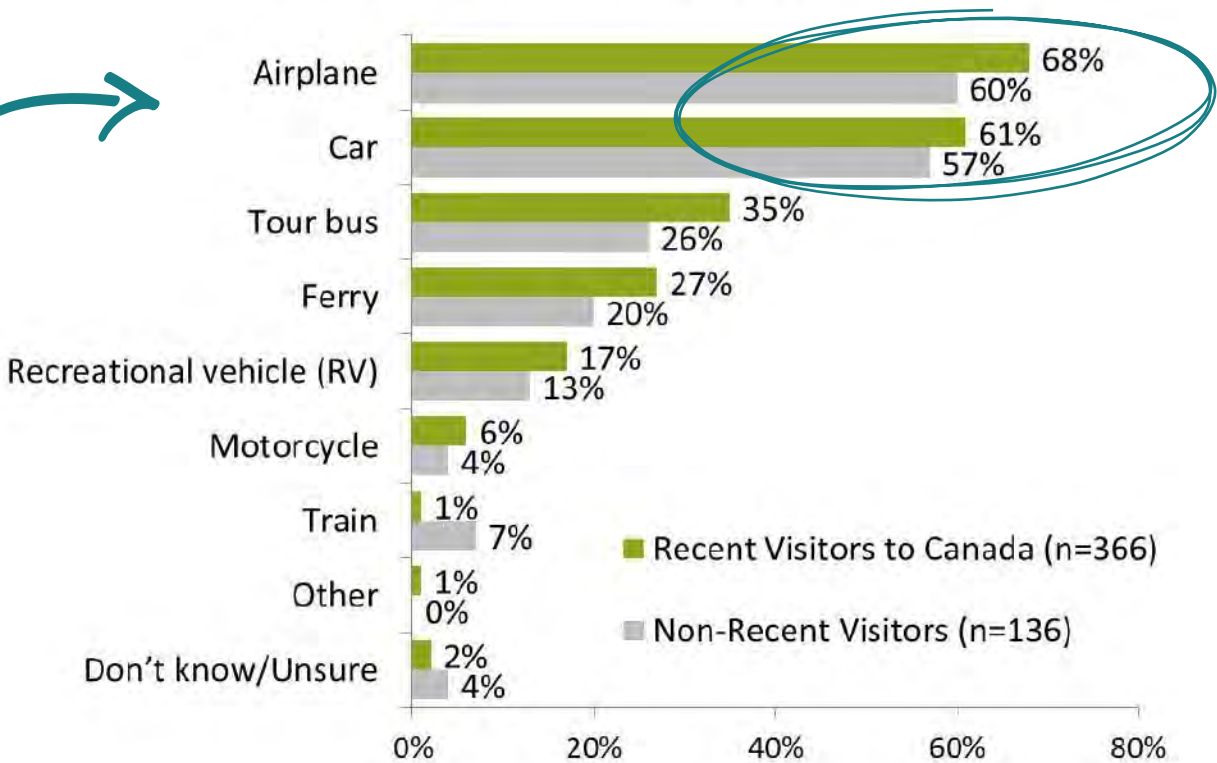


Most would visit multiple provinces if planning a trip to Atlantic Canada, with airplane and car the most likely means of travel between provinces.

### Planning Visit to a Single or Multiple Provinces in Atlantic Canada in the Next 2 Years



### Modes of Travel Between Atlantic Provinces



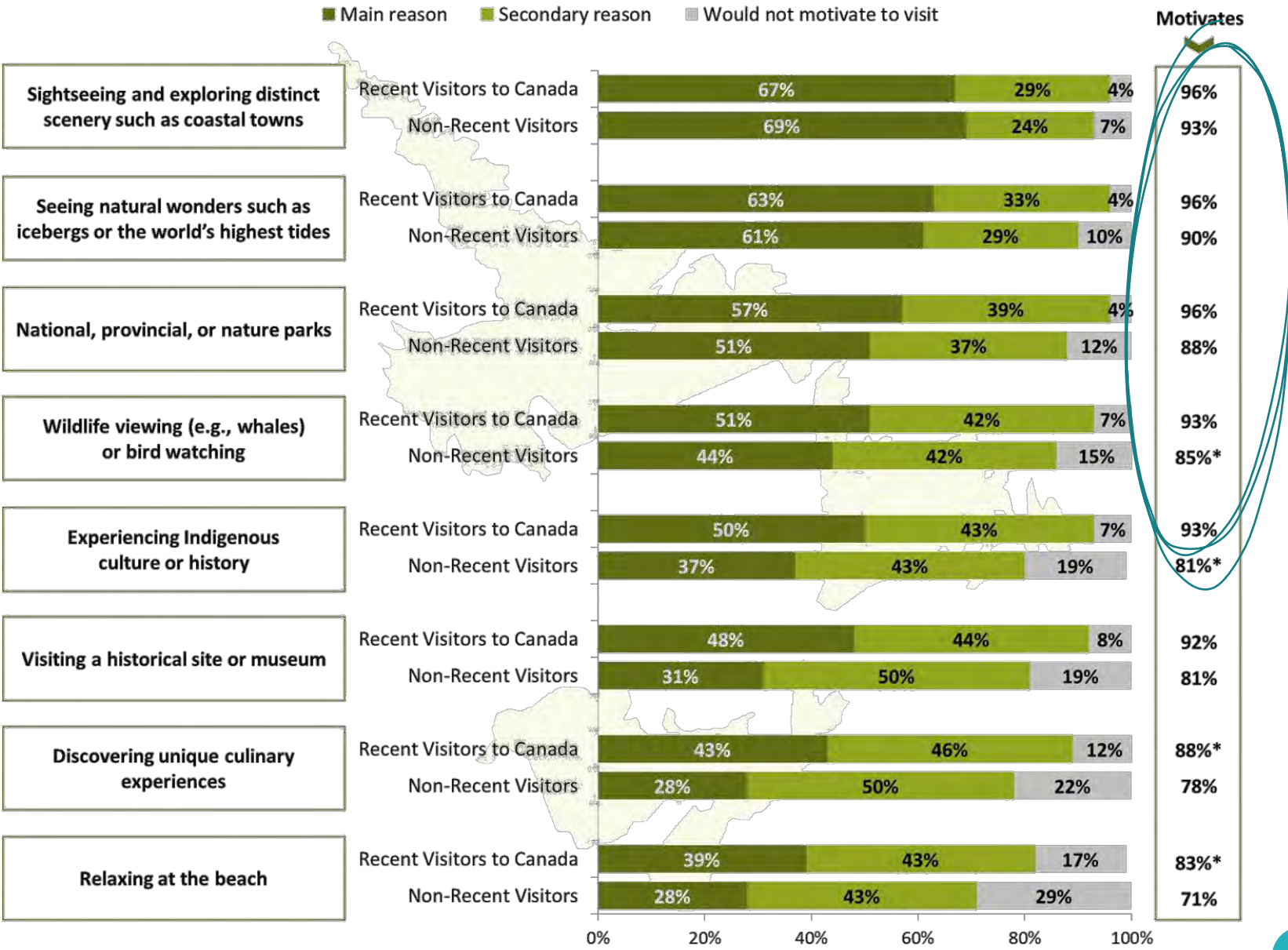




16  
Motivators  
Assessed

Various outdoor aspects are key motivators for visiting Atlantic Canada including sightseeing and exploring distinct scenery, seeing natural wonders, and parks.

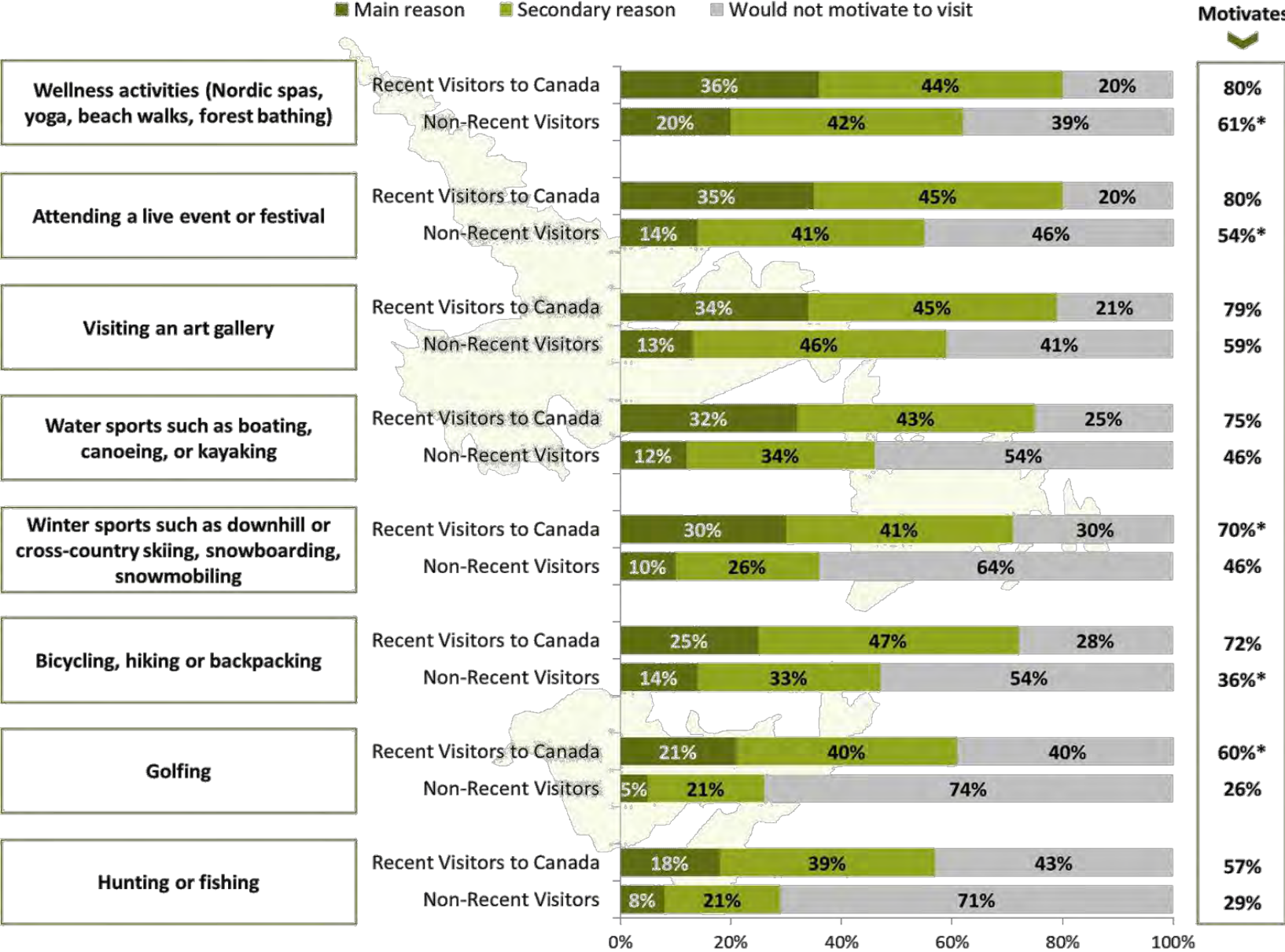
Motivators to Visit Atlantic Canada





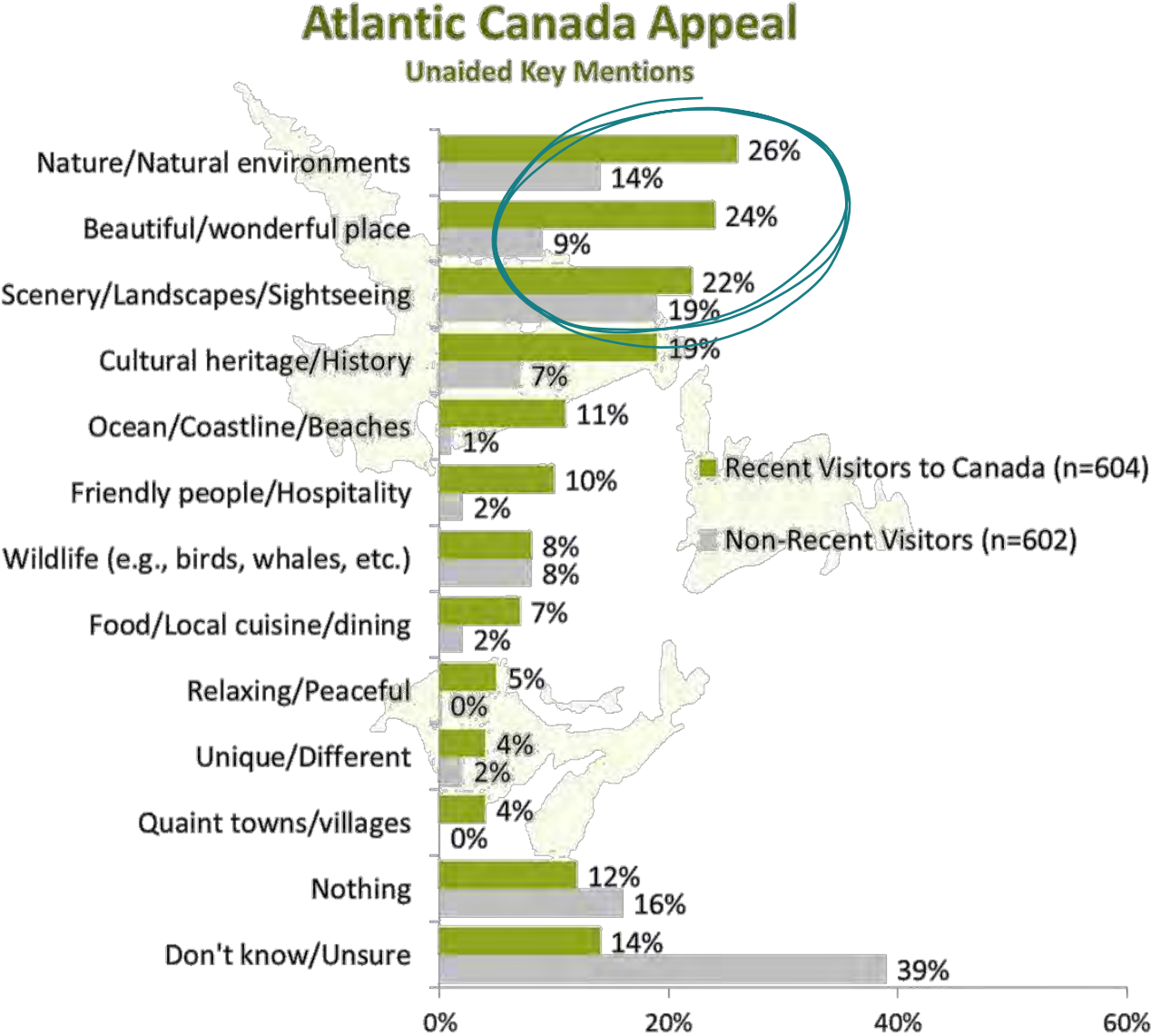


# Motivators to Visit Atlantic Canada





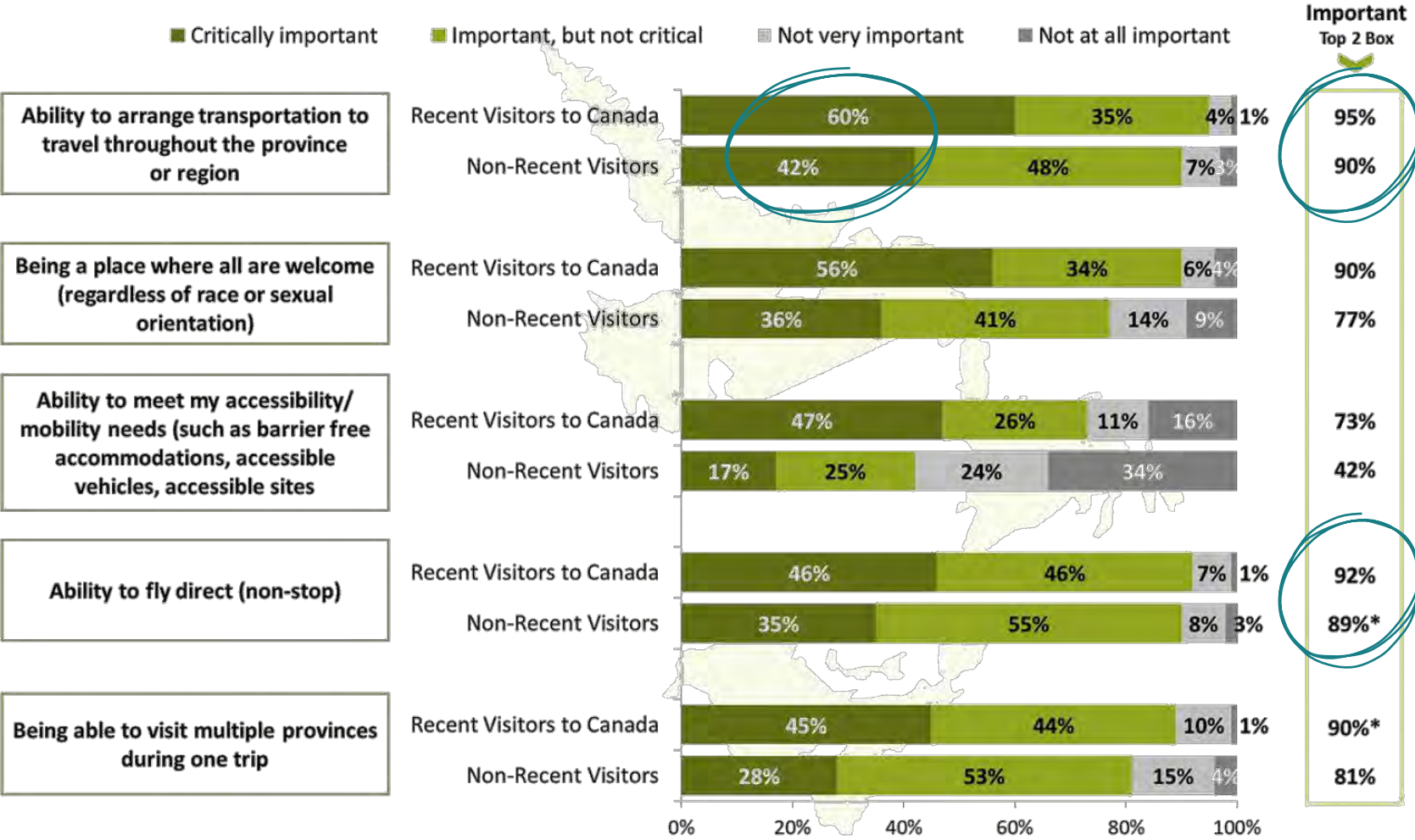
Nature, the region's beauty, and scenery are the most appealing elements of Atlantic Canada to UK travellers.





Ease of transportation across the region is a key consideration in visiting Atlantic Canada, as well as access to direct flights, being a welcoming destination, and having the ability to visit multiple provinces as part of a single trip.

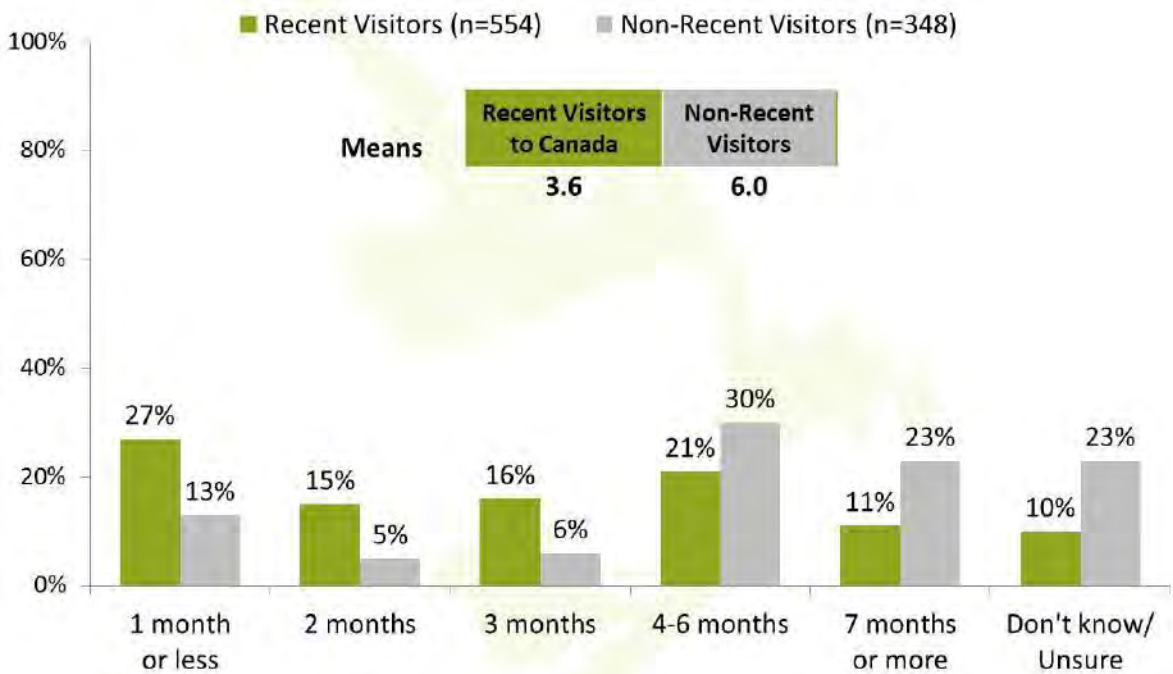
Important Considerations in Visiting Atlantic Canada



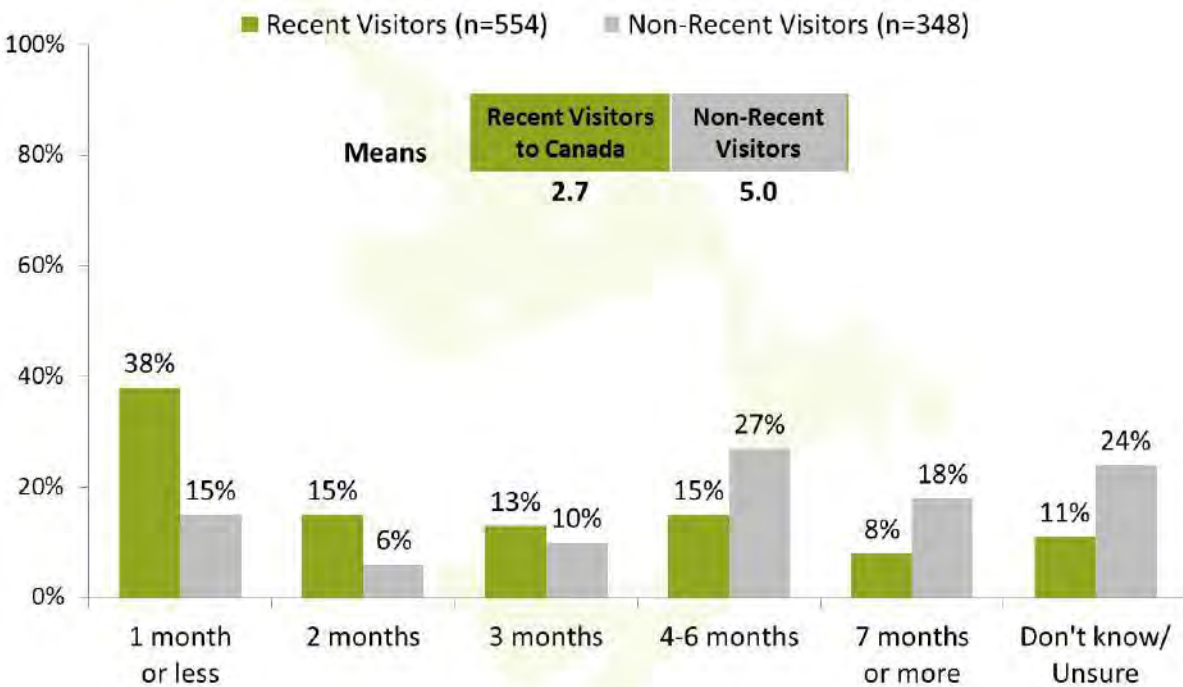


Planning/researching of trips to Atlantic Canada, as well as the advance booking of trips, are subject to wide variability. Recent visitors to Canada would spend considerably less time on both activities.

Time Spent Planning Atlantic Canadian Trip



Advance Booking of Trip to Atlantic Canada

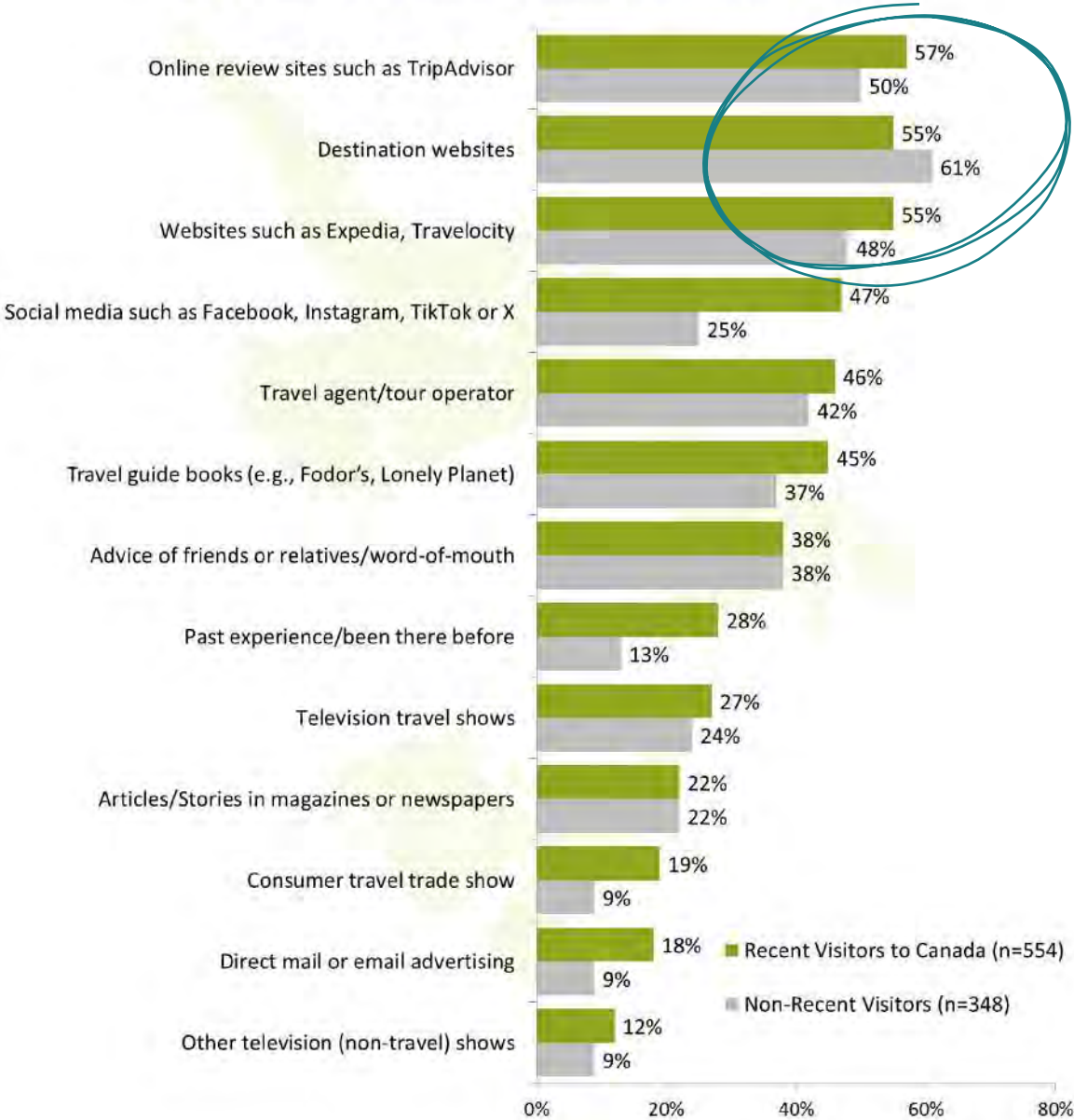






UK travellers would look for information on Atlantic Canadian provinces from multiple sources, with destination websites, online review sites such as TripAdvisor, and websites such as Expedia and Travelocity being the most widely used.

Key Sources of Information on Atlantic Canada

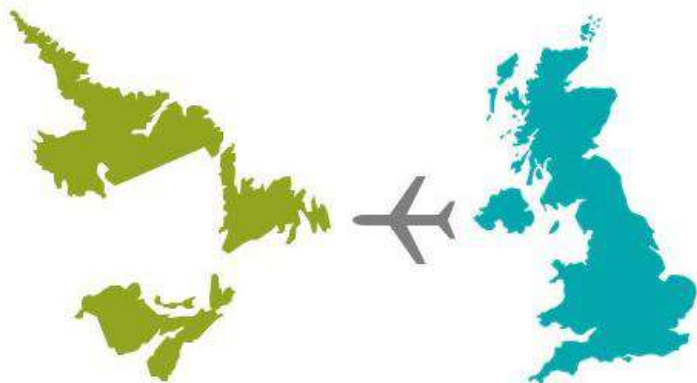


Q.29: [IF 'DEFINITELY WOULD CONSIDER' OR 'PROBABLY WOULD CONSIDER' OR 'MIGHT OR MIGHT NOT CONSIDER' ATLANTIC CANADA DESTINATIONS IN Q.20] Where would you look for information on [name Atlantic provinces selected at Q20]?

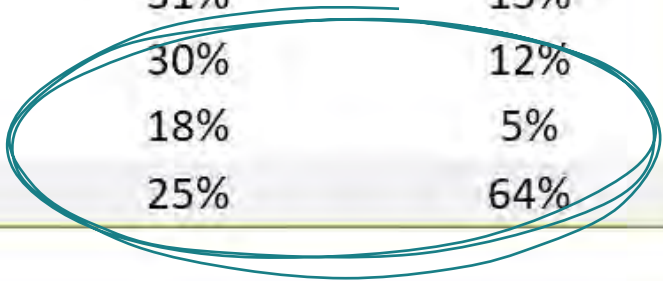


While most believe there are direct flights to Atlantic Canada from the UK, there is some confusion that New Brunswick and Prince Edward Island offer direct flights from the UK.

Direct Flights from the UK



	Recent Visitors to Canada	Non-Recent Visitors
Believe they can fly non-stop to Atlantic Canada from the UK	80%	74%
<i>With Direct Flights to...</i>		
NS	47%	24%
NL	31%	15%
NB	30%	12%
PEI	18%	5%
Don't know/Unsure	25%	64%





Travel agent/tour operator services are widely used by UK travellers, particularly for booking flights and accommodations.

### Usage of Travel Agents/ Tour Operators



**76%**  
of Recent Visitors to  
Canada would use a travel  
agent or tour operator to  
help plan, organize, or  
book travel arrangements  
to Atlantic Canada

VS.

**60%**  
of Non-Recent Visitors







# Ad Evaluations



While all image concepts hold some level of appeal to visitors, six images centered around nature/scenic beauty are identified as most effective in attracting visitors to the Atlantic Canada region.

### Image Effectiveness in Attracting Visitors to Atlantic Canada

Very/Somewhat Effective



**95%**

70% Very; 25% Somewhat



**95%**

65% Very; 30% Somewhat



**95%**

66% Very; 29% Somewhat



**94%**

64% Very; 30% Somewhat



**94%**

59% Very; 35% Somewhat



**93%**

66% Very; 27% Somewhat

Recent Visitors  
to Canada

Non-Recent  
Visitors

**92%**

60% Very; 32% Somewhat

**89%\***

50% Very; 38% Somewhat

**88%\***

48% Very; 41% Somewhat

**90%**

47% Very; 43% Somewhat

**85%**

36% Very; 49% Somewhat

**90%**

48% Very; 42% Somewhat



**89%**

54% Very; 35% Somewhat



**88%**

57% Very; 31% Somewhat



**87%\***

57% Very; 31% Somewhat



**81%\***

46% Very; 36% Somewhat



**75%**

43% Very; 32% Somewhat



**71%**

39% Very; 32% Somewhat

Recent Visitors  
to Canada

Non-Recent  
Visitors

**75%**

30% Very; 45% Somewhat

**74%**

30% Very; 44% Somewhat

**71%**

32% Very; 39% Somewhat

**59%\***

21% Very; 39% Somewhat

**40%**

12% Very; 28% Somewhat

**41%\***

11% Very; 29% Somewhat



Most UK travellers find the New Brunswick campaign appealing, although the ads resonate more so with recent visitors to Canada and younger travellers.

New Brunswick Ad Evaluation



Agree these ads...	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	83%	59%
Grab my attention	80%	58%
Show unique offerings	80%	58%
Encourage me to find out more about NB	80%	55%
Motivate me to travel to NB in the future	78%	49%
Speak to me personally	75%	47%

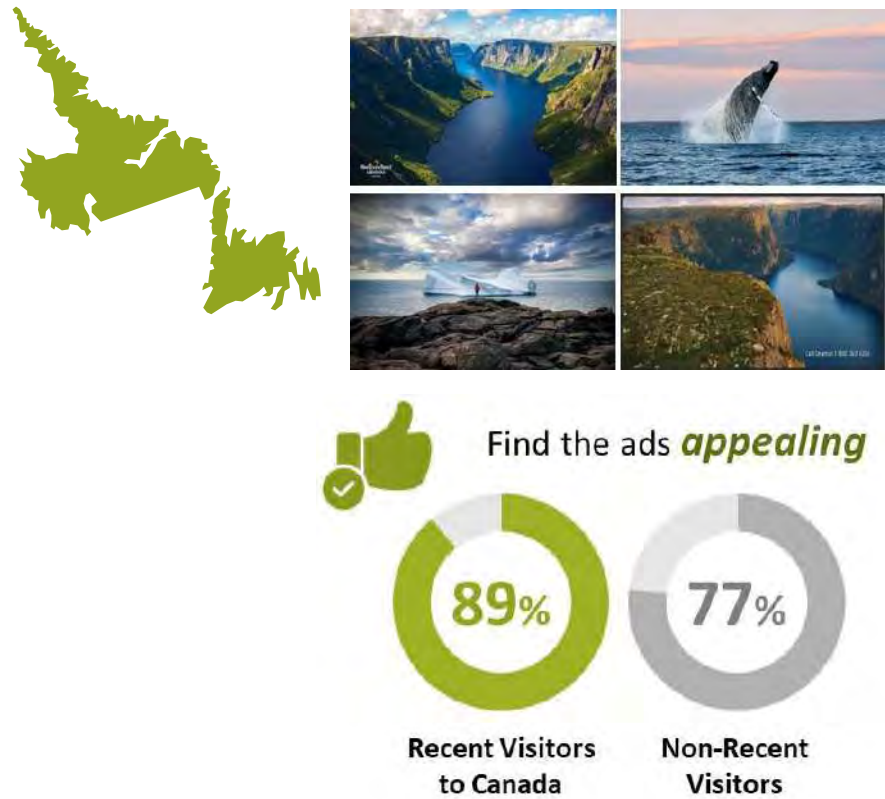
 <i>Pleasure trip to NB after seeing ads</i> Full Base	Recent Visitors to Canada	Non-Recent Visitors
<i>Likely</i> to Consider	71%	31%
<i>80/20 Rule Applied</i>	40%	13%





The bulk of UK travellers find the Newfoundland & Labrador campaign appealing, with a strong majority agreeing the ads grab their attention, include things of personal interest, and showcase the Province’s unique offerings.

Newfoundland & Labrador Ad Evaluation



Agree these ads...	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	89%	77%
Grab my attention	87%	76%
Show unique offerings	89%	74%
Encourage me to find out more about NL	86%	71%
Motivate me to travel to NL in the future	85%	67%
Speak to me personally	80%	62%

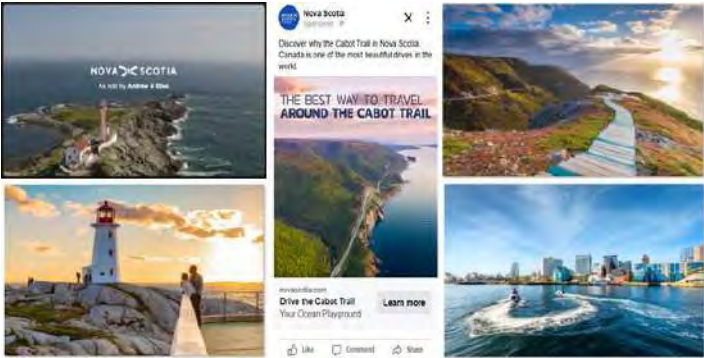
 Pleasure trip to NL after seeing ads Full Base	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	74%	40%
80/20 Rule Applied	41%	17%





The Nova Scotia ad campaign performs well among the majority of UK travellers, with most finding it appealing, attention-getting, including things of interest, and motivating travel to the Province.

Nova Scotia Ad Evaluation



Find the ads *appealing*



Recent Visitors to Canada



Non-Recent Visitors

Agree these ads...	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	88%	74%
Grab my attention	86%	70%
Show unique offerings	83%	66%
Encourage me to find out more about NS	85%	68%
Motivate me to travel to NS in the future	85%	64%
Speak to me personally	79%	58%



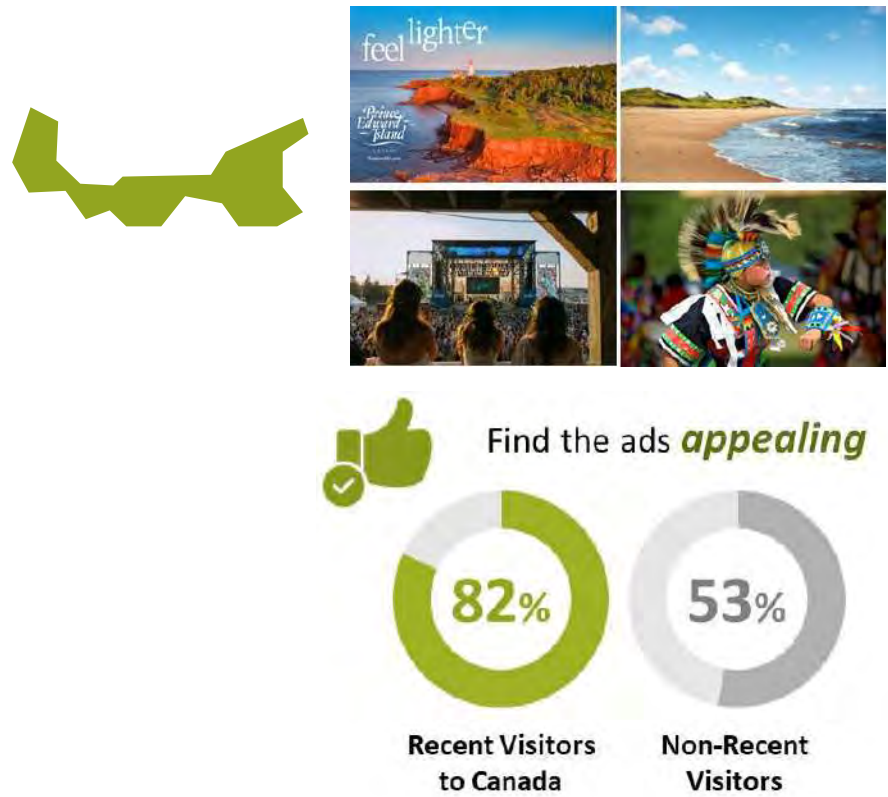
Pleasure trip to NS after seeing ads  
Full Base

	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	78%	41%
80/20 Rule Applied	45%	18%



The Prince Edward Island ads are appealing to recent visitors to Canada and considered attention-getting, incorporating things of personal interest, and encouraging them to learn more about the Province.

Prince Edward Island Ad Evaluation

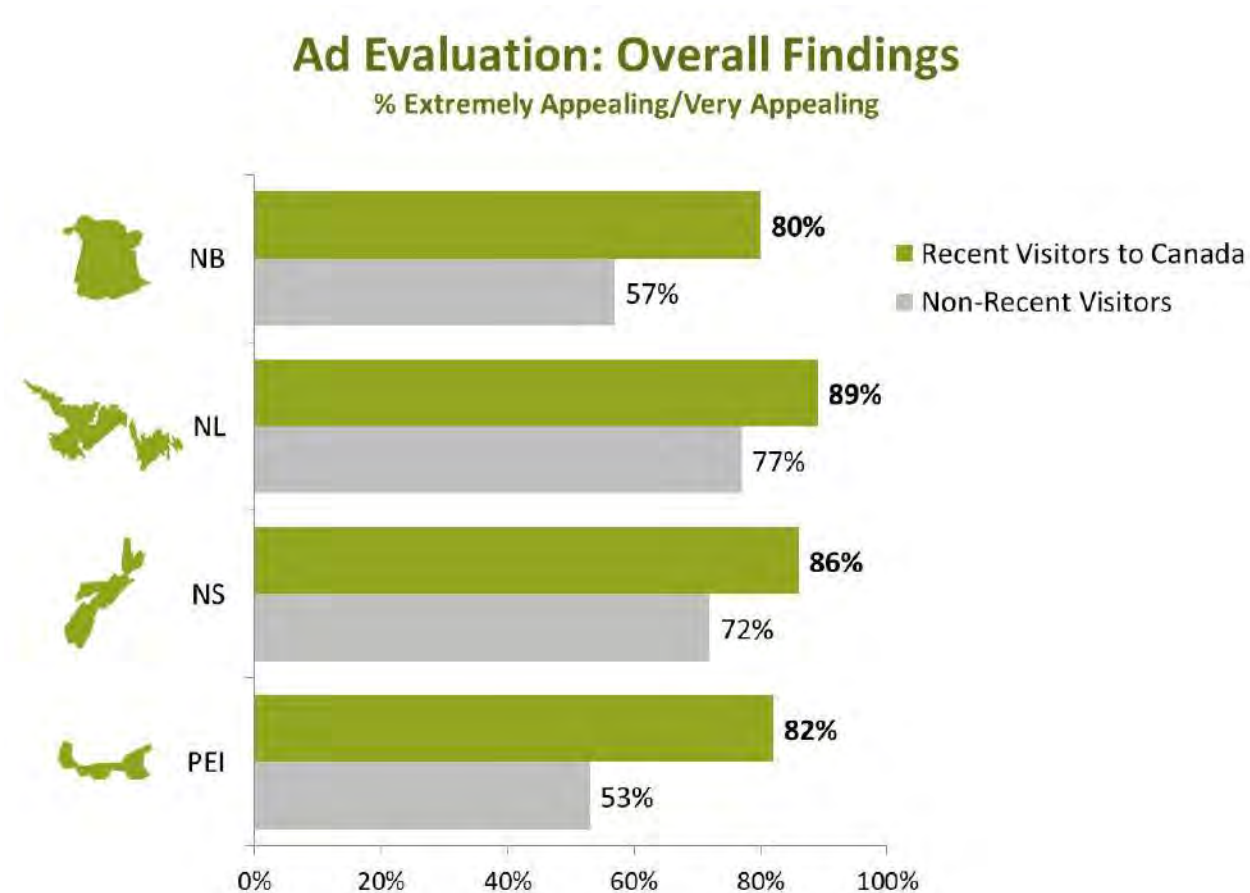


Agree these ads...	Recent Visitors to Canada	Non-Recent Visitors
Include things that are of interest to me	81%	55%
Grab my attention	81%	54%
Show unique offerings	79%	52%
Encourage me to find out more about PEI	81%	53%
Motivate me to travel to PEI in the future	77%	46%
Speak to me personally	74%	45%

 Pleasure trip to PEI after seeing ads <small>Full Base</small>	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	72%	32%
80/20 Rule Applied	42%	15%



Across campaigns, recent visitors to Canada are notably more likely than non-recent visitors to find each campaign appealing.









Overall, ad exposure positively impacts likelihood to consider visitation to Atlantic Canada, and impact is most evident for Nova Scotia and Newfoundland & Labrador.

Likely to Consider Visiting Atlantic Canada in the Next 2 Years

Full Base	 NB				 NL				 NS				 PEI			
	Pre-Ad		Post-Ad		Pre-Ad		Post-Ad		Pre-Ad		Post-Ad		Pre-Ad		Post-Ad	
	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors	Recent Visitors to Canada	Non-Recent Visitors
Likely to Consider	68%	28%	71%	31%	70%	31%	74%	40%	74%	32%	78%	41%	73%	28%	72%	32%
80/20 Rule Applied	36%	11%	40%	13%	35%	13%	41%	17%	40%	15%	45%	18%	41%	12%	42%	15%



Looking Forward



## Looking Forward

1. **UK long-haul travellers exhibit diverse characteristics and behaviors.** There appears to be those who stay closer to home (i.e., more domestic or Europe), and those who venture farther away with interest in exploration and discovery. The latter better reflects visitors who have visited Canada in the past three years. Past experience with travel to Canada has a clear and significant impact on perceptions and travel intentions to Atlantic Canada. Recent visitors to Canada from the UK share a somewhat different profile than those who have not been to Canada recently.
2. **UK travellers are generally open to considering Atlantic Canada as a long-haul destination choice, especially among those who have recently travelled to Canada.** UK travellers are especially interested in flying direct to their destination, and findings suggest greater efforts are needed to highlight the non-stop connections to the region. UK travellers have an interest in visiting multiple provinces in the region when visiting, and place considerable importance on being able to easily travel within the region.
3. Despite expressed consideration of Atlantic Canada as a travel destination, when it comes to destination choices, **the region faces clear competition when it comes to the UK market.**
4. Overall, the **current advertising campaigns for each Atlantic Canadian province are well received**, particularly among recent visitors to Canada. The campaigns appear to have a positive impact on building interest in visiting multiple provinces. Results suggest consideration should be given to incorporating visuals that showcase panoramic views of the region's unique geographic offerings and/or distinct landscape that may suggest a sense of discovery and awe-inspiring exploration.



every insight tells a story.

