

*EVALUATION OF THE
ATLANTIC CANADA TOURISM PARTNERSHIP (ACTP)
2006-2009
EXECUTIVE SUMMARY*

Rod Cunningham
Mackellar Cunningham & Associates Ltd
Stephen Smith
University of Waterloo

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*MacKellar Cunningham
& Associates Ltd.*

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- The 2006-2009 Atlantic Canada Tourism Marketing Partnership (ACTP) was successful in meeting its overall objectives. Over the three years of the Program, the partnership generated a total of \$280.8 million in tourism expenditures in Atlantic Canada and attained an overall return on investment (ROI) of 18:1.
- Despite weak market conditions, the US program continued to perform well in 2008. It generated \$66.9 million in revenues and attained an ROI of \$16.99. Over the three years of the Agreement, the US Program generated \$268.1 million in expenditures and attained an ROI of \$21.68. This was well above its 14:1 objective.
- In 2008, the Overseas Program was successful in meeting its 6:1 ROI objective. The Program generated \$5.5 million in expenditure and attained an ROI of \$6.10. The ROI was up from \$4.74 last year and \$4.00 in 2006. Over the three years of the Agreement, the Overseas Program generated \$12.8 million in revenues and attained an ROI of \$4.94.
- The US consumer advertising campaign attained an ROI of just over 22:1 in 2008. This was the sixth consecutive year the campaign has delivered an ROI of more than 20:1 in unstable market conditions.
- In addition to the expenditures generated by the consumer campaign, the most recent bi-annual surveys carried out in New England show advertising awareness for the Atlantic Provinces increased in 2007 and generally ran equal to or better than awareness for its leading Canadian competitors (Quebec and Ontario).
- Reaction to the new consumer campaign in Europe was very positive. The campaign attracted 31,300 unique visitors to Atlantic Canada web site and generated an estimated \$2.7 million in spending in Atlantic Canada in 2008.
- Tour wholesaler partnerships in Europe were successful in generating \$8.4 million in tourism expenditures in the Atlantic Region over the course of the Agreement. A total of 34 partnerships were formed and attained an ROI of 14:1.
- Although partnerships with US tour operators generated \$4.3 million in expenditures over the course of the Agreement, the ROI for the program continued to slip in 2008. It fell from \$30.19 in 2006 and \$10.17 in 2007 to \$9.92 in 2008. Overall, the program met its objectives with a three year ROI of \$14.77.
- Media-brokered savings and added value in the US market totaled \$987,000 in 2008. Over the course of the Agreement, media-brokered savings totaled \$3.4 million. Savings exceeded objectives in all three years.
- Media relations programs continued to be very successful in both the US and overseas markets. The equivalent of \$12.57 million in media coverage was attained in the US in 2008. This was well above the \$7 million target. In overseas markets, media coverage in 2008 totaled \$14.1 million and reached all time highs in all markets.
- Over the course of the Agreement, the equivalent of \$34.8 million in media coverage was attained in the US and \$30.8 million was attained in overseas markets.

- Two very successful Atlantic Canada Showcases were held over the course of the Agreement. The two marketplaces were attended by a total of 80 buyer companies and 220 Atlantic Canadian seller companies. Despite weak market conditions there was minimal fall-off in attendance at the 2008 Showcase.
- The most recent International Travel Survey data show visitation to Atlantic Canada from both New England and the Mid-Atlantic States declined in 2007 but expenditures by New England visitors increased by 5.9 percent and expenditures by Mid-Atlantic visitors increased by 29.5 percent.
- In 2007, Atlantic Canada captured its highest share of total expenditures by New England visitors in Canada in four years (20 percent) and its highest share of Mid Atlantic expenditures in three years (6.5 percent).
- The International Travel Survey showed very positive momentum for Atlantic Canada in overseas markets in 2007. Visitation from overseas markets increased by 6.2 percent and expenditures increased by 2.7 percent. Visitation and expenditures were up for three of the Regions four primary markets.
- Germany was the only market showing a decline in visitors and expenditures although this was offset by the fact that Atlantic Canada's share of the German market increased dramatically, from 6.8 percent of total expenditures in Canada to an all time high of 8.4 percent.
- Although Japan continues to be a relatively small market, a significant turn-around appears to have occurred in 2007. Visitation, expenditures, and shares increased for Japan in 2007 and the Anne 100th promotion appears to have generated considerable impact. Media coverage, which had been flat, increased by more than 4 times the level of the past two years. All of the coverage in 2008 was devoted to Anne.
- Although specific measures are not available, indicators suggest 2008 was an exceptionally good year for Corporate Communications. The Secretariat carried out all activities as scheduled; an estimated 930 member of industry were in audiences at Association Conferences for the full ACTP presentation; more than 400 are regular readers of the ACTP newsletter (e-mail) and more than 7,000 visited the ACTP web site in 2008.
- ACTP continues to be a leader in tourism research. The ACTP web site provides access to one of the most comprehensive and up-to-date inventories of tourism research in the country.