

***EVALUATION OF THE ATLANTIC CANADA TOURISM PROGRAM (ACTP)***

***Year 2 :( 2007-2008)***

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## *EXECUTIVE SUMMARY*

- The Atlantic Canada Tourism Marketing Program (ACTP) was successful in meeting its overall objectives in 2007. The Program generated \$87.0 million in expenditures in Atlantic Canada and attained an overall return on investment (ROI) of 17:1.
- The US program continued to be very strong. It generated \$82.9 million in expenditures and attained an ROI of 19.45:1. This was well above its 14:1 objective.
- The Overseas program improved its ROI from \$4.00 last year to \$4.74 in 2007 however it continued to run short of its 6:1 objective. Revenues used to evaluate the overseas program are limited to the results of tour wholesaler co-ops. Web inquiries are an example of impacts which are not included in revenue estimates. Web inquiries in overseas markets have now reached levels that conversion rates of less than 5 percent would be required to meet overall program objectives in overseas markets.
- The US Consumer advertising campaign attained an ROI of over 26:1. This was the fourth 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, surveys carried out in New England show advertising awareness for the Atlantic Provinces increased in 2007 and it generally ran equal to or better than awareness for its leading Canadian competitors (Quebec and Ontario).
- Media brokered savings and added value in the US market totaled \$1.4 million in 2007. This was an all time high for the program and was well above the objective of \$900,000.
- Media relations programs were very successful in both the US and overseas. The equivalent of \$13.6 million in media coverage was attained in the US (up 58 percent from last year). In overseas markets media coverage reached \$10.2 million (up 9 percent from 2006).
- Tour wholesaler partnerships in Europe were very successful. Fourteen partnerships delivered \$3.7 million in ACTP attributed expenditures and an ROI of almost 16:1. Expenditures were up 20 percent from \$3.1 million last year and the ROI was up from 10:1.
- France is still in the start up phase. Three of five (reporting) tour wholesaler partnerships generated \$315,000 in revenue attributed to ACTP and an ROI of approximately 10:1.
- Partnerships with US tour operators struggled in 2007. Three partnerships generated \$800,000 in revenue and an ROI of 10:1.
- The most recent International Travel Survey data (2006) shows New England visitation and expenditures in Atlantic Canada have been falling consistently for the past four years yet the Region's share of total New England visits and expenditures in Canada have remained relatively stable.
- This is not the case with the Mid Atlantic States. Atlantic Canada has lost share as well as volumes of visitors and expenditures.

- The International Travel Survey found visitation to Atlantic Canada from overseas markets declined by 6.4 percent in 2006. Expenditures remained unchanged at \$102 million. Preliminary data suggests little change should be anticipated in 2007 (direct entries to Canada up 3.5 percent).
- In terms of individual markets, Germany appears to have positive momentum (four consecutive years of increase); the UK is flat (little change in four years); Japan is in trouble (consistently falling in visitation, revenue and share).
- Although specific measurables are not available, indicators suggest it was a very good year for Corporate Communications. All activities were carried out as scheduled.
- It was also a very successful year for research. In addition to awareness and travel intention studies the research web site now lists more than 50 recent studies which cover all segments of the Industry.

## SECTION 1

### BACKGROUND AND SITUATION

### ***1.1 OVERVIEW OF THE ATLANTIC CANADA TOURISM PARTNERSHIP***

The Atlantic Canada Tourism Partnership was founded in 1991 and has since been renewed five times for consecutive three year terms. ACTP has traditionally focused on marketing and marketing related activities in international markets with a sustained focus on the United States.

The current 2006-2009 agreement provides the flexibility to reallocate resources from existing international markets to potentially higher yield domestic markets should conditions dictate.

The conditions of the agreement specify that all marketing programs incorporate the following into annual work plans:

- a. Sound Market research
- b. Maximizing economies of scale
- c. Funds being incremental to existing provincial programs
- d. Clear responsive measurement systems built into campaigns
- e. Detailed marketing budgets on a per market basis
- f. Marketing strategies reflective of current market conditions
- g. Marketing strategies which incorporate internet strategies
- h. Marketing activities dictated by the market and by provincial priorities
- i. Evaluation and performance measurement strategies and tactics
- j. Ensure creative campaigns built on market research
- k. Marketing strategies that enhance and reinforce Canada's new brand where appropriate

The Agreement specifies that all marketing programs must be evaluated annually and reacted to against pre-stated goals, objectives and methodologies.

#### ***Evaluation Comment***

*This evaluation has found that all marketing activities undertaken in 2007-2008 followed the criteria as outlined in the Agreement.*

*While criteria were followed there is room for improvement. Most notable is the new Alberta initiative undertaken by Nova Scotia and New Brunswick. Although this program is still in its development stage there is a need to better define impact measurements.*

*It is also noted that annual evaluations are limited to assessing the results of marketing activities. Surveys carried out with Management and Marketing Committees in 2006 found many of the Programs greatest strengths relate more to the benefits (and learning) gained through regional cooperation. There is a need to broaden the evaluation (and data) to include these aspects.*

**SECTION 2**

***THE US MARKET PROGRAM***

## 2. THE US MARKET

### 2.1 US BUSINESS AND MARKET ENVIRONMENT

The tourism industry in Canada has been struggling since 2002. US visitation has fallen to 25 year lows and with few exceptions domestic travel has failed to fill the void.

Atlantic Canada has not escaped the national downturn. For the past five years Provinces in Atlantic Canada that routinely ran at 80 percent plus occupancy rates in July and August have been struggling to hold above 60 percent. The leading cause of the problem is demand has shown little growth while accommodation capacity in Atlantic Canada has increased by 16 percent since 2000 (from 2,986 properties and 39,105 units in 2000 to 3,364 properties and 45,182 units in 2006).

Many factors have contributed to the US decline:

- A lost currency advantage (exchange)
- New destinations and increased competition
- Higher fuel costs
- Iraq war
- Border security issues and uncertainty
- A lagging New England economy

These factors are still very much in play and with fear of recession now added to the mix the outlook for a rapid US recovery is not optimistic.

The Atlantic regions situation has not been limited to a decline in the number of US visitors. There has been a change in the structure of visitation. As illustrated in the following table the number of US visitors entering the region by automobile and motorcoach have experienced the greatest declines. Touring by automobile or motorcoach have historically been Atlantic Canada's leading product strengths in the US.

Mode of Travel to Atlantic Canada US Overnight Visitors 2002-2006			
	2002	2006	% Change
<b>Automobile</b>	439,000	341,000	-22.3%
<b>Air</b>	166,000	147,400	-11.5%
<b>Motorcoach</b>	38,000	14,500	-61.8%
<b>Cruise</b>	141,000	136,800	-1.7%

Source: Statistics Canada, International Travel Survey: 2002 & 2006

#### **Outlook**

The only positive factor which would support US market recovery is the fact that frontier counts to the end of October show US overnight entries to Atlantic Canada are on course to show a small increase in 2007 despite the further fall of the US dollar. This could be interpreted as a bottoming out of the decline.

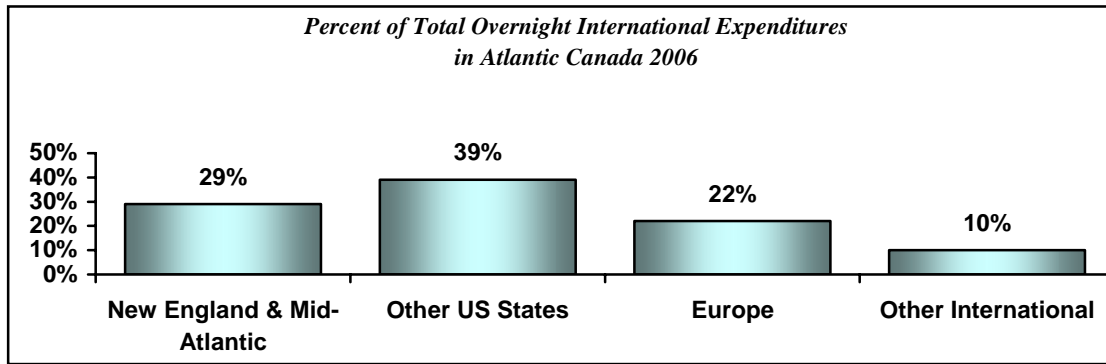
With fear of recession and a weak stock market now added to the negative mix of influences, a more realistic outlook would anticipate further declines.



## 2.2 PROGRAM OVERVIEW

The US is the dominant international market for Atlantic Canada. In 2006, visitors from the US spent \$427.8 million in the Atlantic Provinces. This represents 68 percent of total international spending in the region.

New England is ACTP's primary US market. The Mid-Atlantic States (New Jersey, New York, and Pennsylvania) are a secondary market. Together, these regions generate 42 percent of total US spending in Atlantic Canada (\$179.8 million out of a total US spend of \$427.8 million) and 28 percent of total international spending (\$179.8 million out of \$635.1 million).



Source: Statistics Canada. International Travel Survey 2006

## 2.3 OBJECTIVES

The US marketing program has the primary objective of attaining an overall ROI of 14:1. This represents an increase of 40 percent in return over the 10:1 objective of the previous Agreement.

The program has other macro-level performance measures including awareness, inquiries, visitor shares, and revenue shares. These are also used to track growth. Performance on these measures is described in the next section.

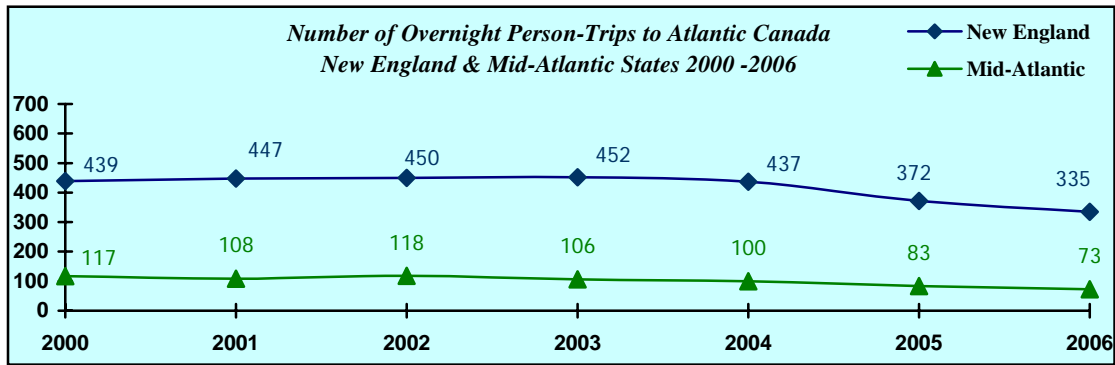
## 2.4 PAST PERFORMANCE

Visitation and revenues are derived from Statistics Canada's *International Travel Survey* (ITS). This data lags one year behind evaluation deadlines. They therefore reflect performance of the previous year's campaigns and represent a baseline or "going in" situation for the 2007 campaign.

### 2.4.1 Visitation

In 2006, the number of overnight visitors to Atlantic Canada from New England fell by 9.9 percent to 335,300 from 2005. This represents a decline of 25.9 percent from the record high of 452,000 visitors in 2003.

The number of overnight visitors from the Mid-Atlantic also continued its decline, falling by 12.0 percent in 2006 to a seven-year low of 73,000 visitors. This represents a decline of 38.1 percent from the high of 118,000 reported in 2002.

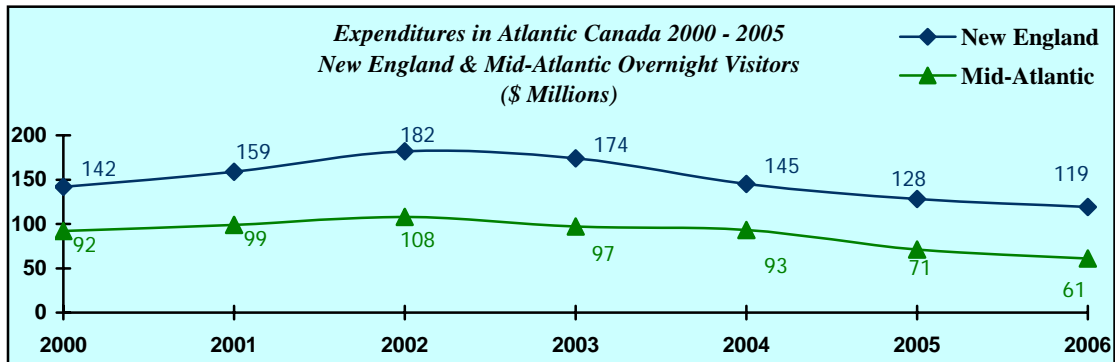


Source: Statistics Canada. International Travel Surveys 2000, 2001, 2002, 2003, 2004, 2005, and 2006

### 2.4.2 Expenditures

Spending by overnight visitors from New England totalled \$119 million in 2006. This was down by 7.0 percent from 2005 and down by 34.6 percent from the peak year of 2002. Significantly the percentage drop in spending was greater than the decline in visitation.

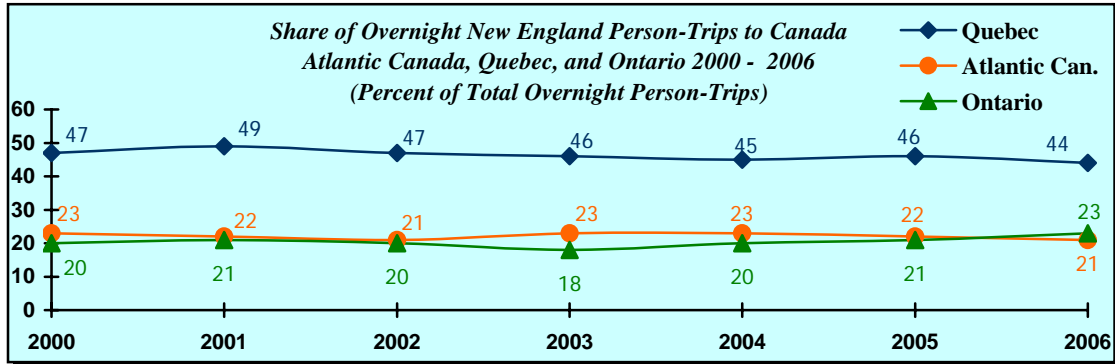
Spending by visitors from the Mid-Atlantic fell by 14.1 percent in 2006 to \$61 million. This was 43.5 percent below the high of \$108 million in 2002.



Source: Statistics Canada. International Travel Surveys 2000, 2001, 2002, 2003, 2004, 2005, and 2006

### 2.4.3 Share of Visits

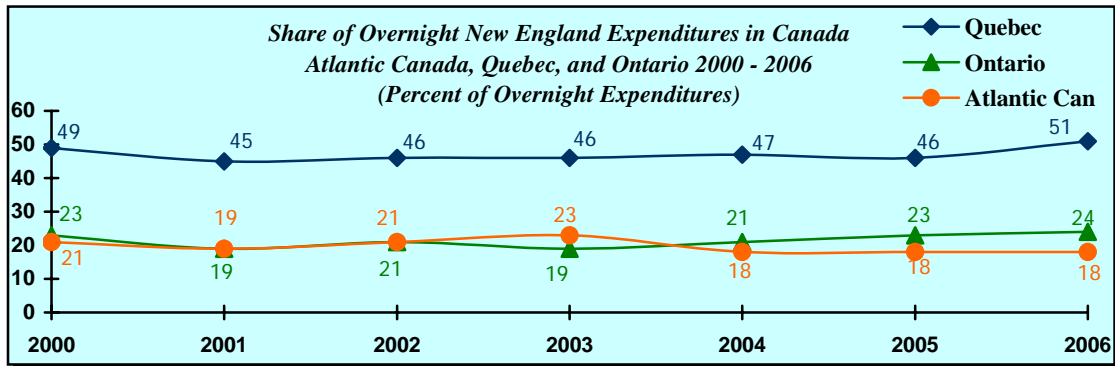
Although the number of visitors from New England has declined over the past five years, Atlantic Canada's share of total visitors from New England to Canada has remained relatively stable in the 21 to 23 percent range. Shares for Quebec have been gradually weakening. Ontario shares have been fairly stable.



Source: Statistics Canada. International Travel Surveys 2000, 2001, 2002, 2003, 2004, 2005, and 2006

### 2.3.4 Share of Expenditures

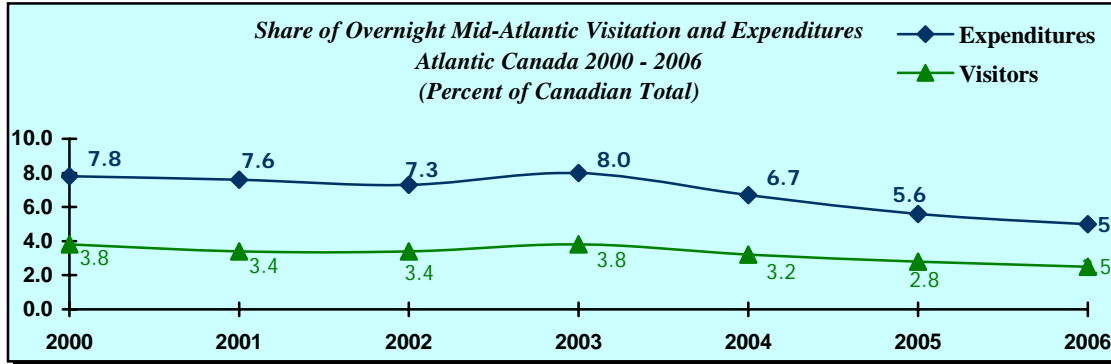
Atlantic Canada's share of expenditures by New England visitors to Canada has held stable since 2004 at 18 percent. Ontario has been steadily recovering share points in the years following the SARS situation. Quebec's share of New England visitation fell to a seven year low in 2006 yet their share of expenditures reached a seven-year high of 51 percent.



Source: Statistics Canada. International Travel Surveys 2000, 2001, 2002, 2003, 2004, 2005, and 2006

### 2.4.5 Mid-Atlantic Shares

Atlantic Canada's shares of visitation and expenditures from the Mid-Atlantic continued to decline in 2006. Share of expenditures fell to 5.0 percent of the Canadian total and share of visits Mid Atlantic visitors fell to 2.5 percent.



Source: Statistics Canada. International Travel Surveys 2000, 2001, 2002, 2003, 2004, 2005, and 2006

### 2.4.6 Summary: The Baseline for 2007

Atlantic Canada entered the US market in 2007 following a 3.2 percent loss in total US overnight visitation and a 9.9 percent loss in visitation from New England (2006 versus 2005).

In addition to the continuing fall in US exchange rates and increases in fuel prices, studies carried out by ACTP in 2007 showed all key economic indicators for New England were weaker than National US averages.

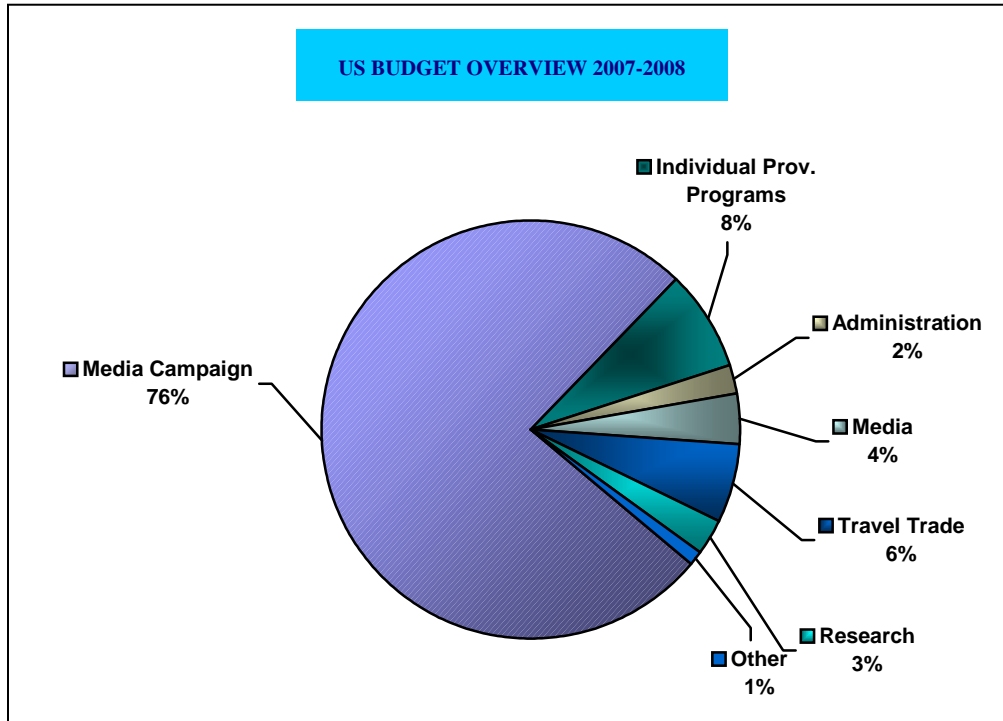
It is positive that although total New England travel to Canada declined by 6 percent in 2006, this decline was in line with performance for the rest of the US. It was also more moderate than the decline of the previous year.



Source: Statistics Canada. International Travel Surveys 2004, 2005, and 2006

## 2.5 THE US MARKETING PROGRAM 2007

In 2007, ACTP invested \$3.6 million into an integrated marketing program in the US. The consumer media campaign (print, electronic, and Internet advertising) accounted for approximately three-quarters of the US program budget.



Source: ACTP Marketing Program Budget 2007/2008.

### 2.5.1 Budget Details

The following table outlines the US Program budget. Approximately 80 percent of expenditures were directed to immediate returns primarily through consumer advertising program. The remaining 20 percent are developmental expenditures. With the exception of trade partnerships, all trade and media programs will yield results a year or more from now. Research investment will yield continuing returns via better informed decisions. Administration and meeting expenses are minimal, and are required for the operation of ACTP programs.

**ACTP Evaluation 2007 -2008  
(Year 2)**

<b>US Budget 2007/2008</b>		
<b>Budgeted Expenditures</b>		<b>Sub-Totals/Totals</b>
<b>Media Campaign<sup>1</sup></b>		
NB	1,113,644.67	
NL	591,764.09	
NS	1,484,022.86	
PE	487,276.19	
Sub-Total		3,676,707.81
<b>Individual Provincial Programs</b>		
NB Media – Western Canada	129,696.95	
NB Media – Western Canada	213,541.26	
Sub-Total		343,238.21
<b>Administration</b>		
Program Manager	87,638.00	
Meeting Expenses	4,360.00	
Industry Travel	9,936.00	
Sub-Total		101,934.00
<b>Media</b>		
Media Broker	103,500.00	
Media Relations	113,276.46	
Sub-total		213,776.46
<b>Travel Trade</b>	312,995.87	312,995.87
<b>Research</b>	122,628.00	122,628.00
<b>Other</b>		
Miscellaneous <sup>2</sup>	10,000.00	
Contingency	60,000.00	
Sub-Total		70,000
<b>Total Budgeted Expenditures</b>		4,866,280.35
Unallocated <sup>3</sup>		861,224.45

Notes:

1. The consumer campaign includes taxes and creative development expenses.
2. Miscellaneous costs include expenses for meetings.
3. Unallocated budget represents money that has not yet been committed to specific activities. \$512,584 will be allocated to the late winter (January – March 2008) marketing campaign.

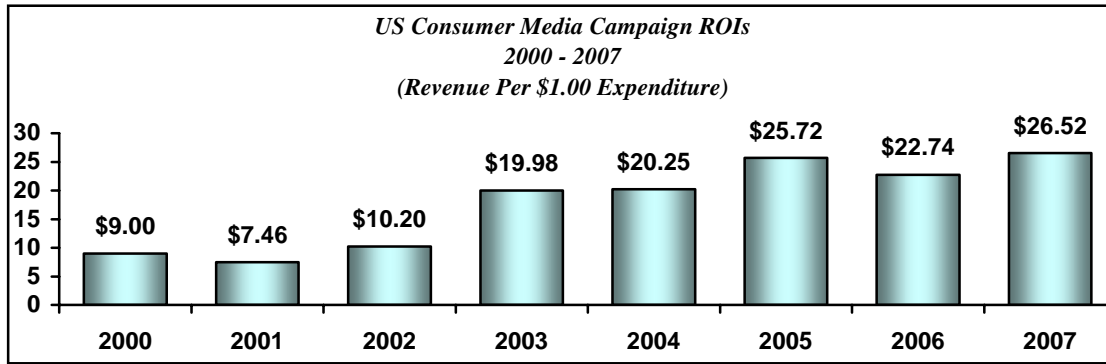
Source: *ACTP Marketing Program Budget 2007/2008.*

## 2.6 US PROGRAMS AND RESULTS

### 2.6.1 US Consumer Media (advertising) Campaign

The US consumer campaign is the largest individual program in the Agreement. Its success is critical to overall ACTP performance. An ROI target of 14:1 was set for the second year of the 2006 – 2009 US Program (unchanged from the first year of the US Program).

The 2007 campaign was successful in generating \$81.2 million in revenues and attaining an ROI of \$26.52:1.00. This was almost double the 14:1 target.



Source: 2007 ACTP Conversion Final Results. January 2007 update

The US Consumer Media Campaign was also given targets for total enquiries, converted party-visits, and revenues.

The following table summarizes key conversion indicators from 2003 through 2007. These results include both direct enquiries (e.g., toll-free calls) as well as anonymous visitors to provincial web sites. The results for 2007 exceeded the targets for every measure.

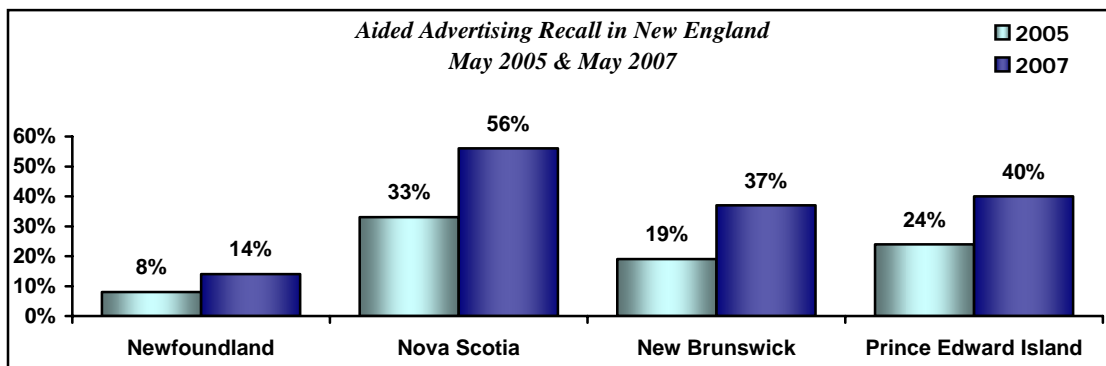
US Conversion Indicators (Direct enquiries plus anonymous web contacts)					
Indicator	2003	2004	2005	2006	2007
Media buy (million)	\$3.66	\$3.31	\$3.09	\$3.65	\$3.09
Inquiries + anonymous visitors to provincial web sites	209,564	186,800	208,352	222,379	199,794
Cost per inquiry	\$17	\$18	\$15	\$16	\$14
Conversion rate	24%	32%	30%	29%	27%
Converted party-visits	56,416	59,000	60,577	65,143	55,385
Cost per converted inquiry	\$65	\$56	\$56	\$56	\$56
Spending per visitor-party	\$1,295	\$1,134	\$1,309	\$1,272	\$1,482
Total revenues (million)	\$73.2	\$66.9	\$79.6	\$82.89	\$82.08
ROI	19.98:1	20.25:1	25.72:1	22.74:1	26.52:1

Source: 2007 ACTP Conversion Final Results. January 2008

### 2.5.2 Awareness

The Program has the objectives of increasing positive awareness in New England. An essential first step is raising advertising awareness. Post campaign studies carried out in 2005 and 2007 show there has been an upward trend in aided advertising recall for the Atlantic Provinces in New England.

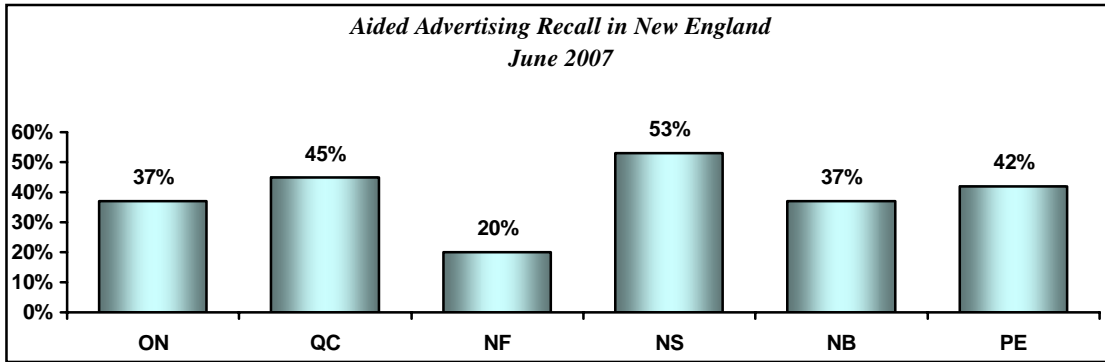
All four provinces have shown increases. Nova Scotia has been especially strong with awareness increasing by 23 points over the past two years (2007 versus 2005).



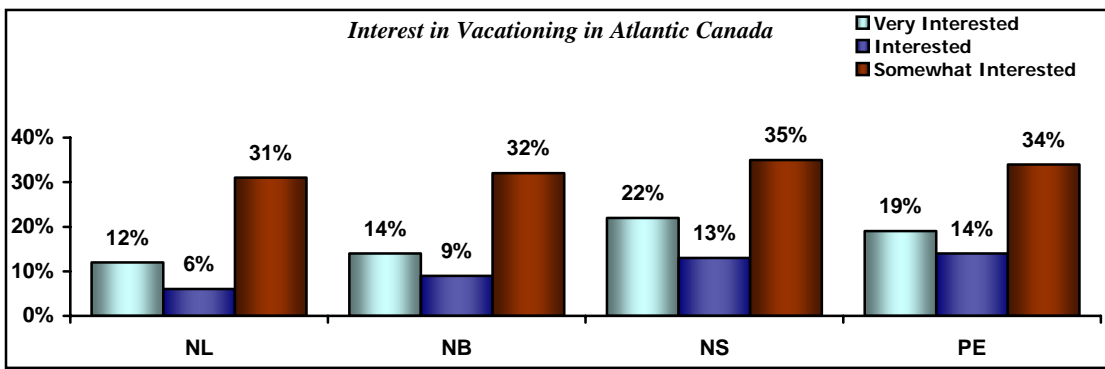
These studies also show awareness of Atlantic Canada advertising has generally kept pace with that of its primary Canadian competitors, Quebec and Ontario.



In 2007 aided recall of advertising for Nova Scotia was higher than for Quebec and Ontario. Recall of both Prince Edward Island and New Brunswick was higher than that of Ontario and comparable to Quebec.



The 2007 survey also confirmed that interest in vacationing in Atlantic Canada remains strong in New England. Generally, more than 50 percent of New England residents are at least “somewhat interested” in visiting Atlantic Canada.

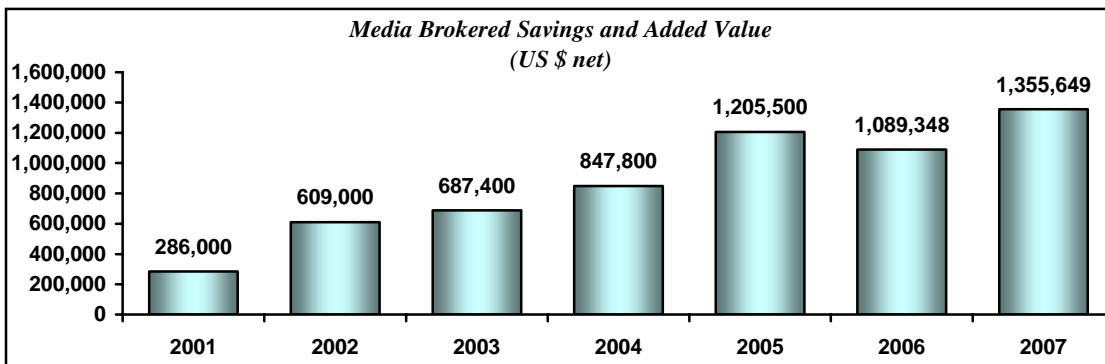


Source: 2007 New England Travel Planners Survey: Final Report

### 2.5.3 Media-Brokered Savings

ACTP uses a media broker to co-ordinate purchases of advertising for the four provincial partners. The broker, through the leverage provided by representing four provinces, is able to negotiate favourable rates, web listings, enhanced circulation, and other benefits.

In 2007, savings and added value achieved through the media broker totalled nearly \$1.4 million, well above the target of \$900,000.



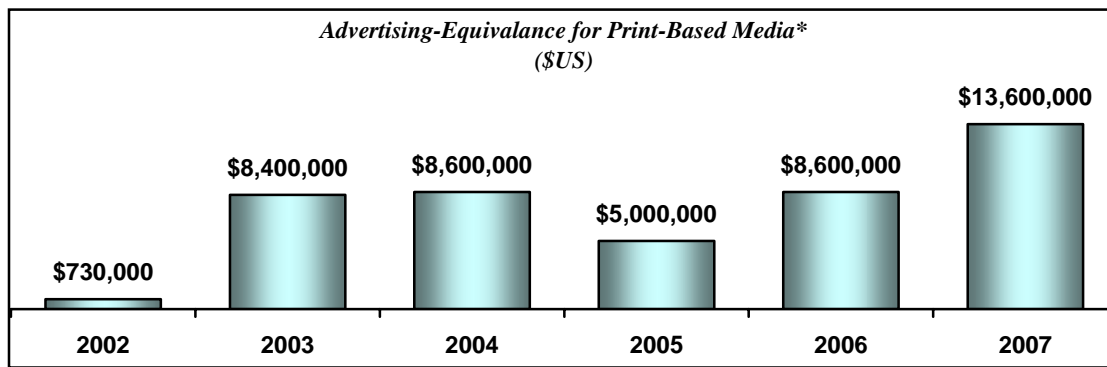
Source: ACTP Secretariat: January 2007 Beyond Added-Value Chart

### 2.5.4 Media Relations

The Media Relations Program is an integral component of the overall ACTP marketing strategy. It is designed to support the ACTP objective of a 14:1 ROI in New England by enhancing the provincial brands with publicity in targeted media.

ACTP engages the services of an in-market firm specializing in media relations to implement this program. Activities undertaken in 2007 included issuing six press releases, and organizing a group press tour and five individual tours to Atlantic Canada. Discussions are underway with numerous journalists about possible media fam tours in 2008.

The editorial value of media coverage attained by Atlantic Canada in 2007 reached an all time of \$13.6 million US (based on the use of a multiplier of 4 to convert print media space to advertising-equivalence value), this was almost double the target of \$7 million.



Source: ACTP Secretariat

\*The advertising-equivalence of web-based media coverage of Atlantic Canada is not included because there is no standard method for assessing its value.

### 2.5.5 Travel Trade Activities

Atlantic Canada's US travel trade market has experienced a significant decline since 2002. In response, ACTP has focussed its travel trade efforts on top-producing operators only. Further, the geographic scope of potential tour wholesaler partners has been broadened from New England and the Mid-Atlantic to anywhere in the US, providing the tour operator is recognized as a top producer for the Region.

#### a. Trade Promotions

Travel trade promotional activities undertaken in 2007 focussed on training sessions with AAA travel agencies (17 Northern New England travel counsellors and 38 Southern New England senior staff) and sales calls (on another 258 travel counsellors). ACTP also participated in a "Canada: Keep Exploring" event in Massachusetts. An audience of 300 AAA members was anticipated, but less than 50 showed up. The low turn-out was attributed to the event being held too early in the day (during the afternoon rush hour).

#### b. Trade Partnerships

Investment in partnerships with tour operators was higher than in 2006. Approximately \$82,000 was invested in tour wholesaler partnerships with three proven suppliers. Based on ACTP's investment relative to total promotional costs, these partnerships resulted in \$834,094 in additional expenditures in Atlantic Canada in 2007. This yielded an ROI of 10.17:1 for the program (down from 30:1 in 2006). Trade partnerships are recognized as necessary high risk investments in down market conditions. The ROI was down from last year due to the exceptional performance of one of last year's partnerships.

2007 Tour Wholesaler Partnership Results				
Tour Wholesaler	Partner Contribution USD	ACTP Contribution USD	ACTP-Attributable Sales USD	ROI
A	\$26,711	\$23,711	\$362,894	15.30:1
B	\$10,000	\$20,000	\$61,200	3.06:1
C	\$38,300	\$38,300	\$410,000	10.70:1
Total	\$75,011	\$82,011	\$834,094	10.17:1

*Source: Confidential tour operator reports provided to ACTP Secretariat*

### **c. Trade Fams**

One trade fam was hosted for a tour operator during 2007. The representative visited all four provinces.

#### **2.5.6 Provincial Programs**

ACTP's US market strategy permits province-specific travel trade and media relations activities if these are deemed by ACTP to be of benefit to the region. Province-specific trade activities included:

- Purchase of ad in a tour operator brochure (results included in table on tour wholesaler partnerships)
- Attendance at three major consumer shows, in partnership with the Canadian Tourism Commission

The assessment of the consumer shows was positive; however, the Canadian Tourism Commission has decided to no longer participate in consumer shows so future provincial participation is unlikely without a national Canadian presence.

#### **2.5.7 Research**

The 2006 – 2009 Agreement specifies that all activities must be based on sound research; the Agreement also calls for expanded performance measurements.

ACTP provides a base of research that is unsurpassed in Canada in terms of being comprehensive and up-to-date. In-depth data is available through the ACTP web site for both US consumer and trade markets through 2007.

Recent (2006-2007) studies now included on the web site include:

- 2007 Travel Intentions
- 2006 US TAMS reports
- 2006 Canadian TAMS reports
- 2006 Spotlight on American Group & Learning Tourist
- 2006 Travel Trade Outlook Study

ACTP has also partnered with the Canadian Tourism Commission in the European Segmentation Study (UK, Germany and France) and with Global Tourism Watch (US, France, Germany, the UK, and Japan). These reports along with an ACTP New England Follow-up Study will be available in early 2008.

**2.6 US PROGRAM SUMMARY**

The US Program was successful in meeting its objectives in 2007. The overall program attained an ROI of approximately 17:1. This was considerably above the target of 14:1. The following table summarizes the activities and accomplishments for 2007.

<b>SUMMARY OF US PROGRAMS, ACTIVITIES, AND IMPACTS</b>				
<b>Program</b>	<b>Expenditure</b>	<b>Summary of Activities</b>	<b>Impact/ Results</b>	<b>Revenue 2007 (Million)</b>
Consumer Campaign	\$3,094,000 <sup>1</sup>	<ul style="list-style-type: none"> <li>• Campaign implemented</li> <li>• 199,794 inquiries generated</li> </ul>	Immediate expenditures Awareness (consumer) Awareness (trade) 27% Conversion ROI 26.52:1	\$82.1
Media Broker	\$103,500	<ul style="list-style-type: none"> <li>• Campaign purchased and added value negotiated</li> </ul>	Savings and added value \$1.4 million	---
Media Relations	\$113,276	<ul style="list-style-type: none"> <li>• In-market representative</li> <li>• 1 fam trip</li> <li>• 2 in-market press tours</li> </ul>	Media coverage \$13.6M Media coverage future Media coverage future	---
Travel Trade	\$312,996	<ul style="list-style-type: none"> <li>• 3 trade partnerships</li> <li>• Trained 55 travel counsellors</li> <li>• 1 trade fam</li> <li>• 258 direct sales calls</li> </ul>	Trade immediate ROI 10.17:1 Trade/consumer future Trade future Trade future	\$0.8 --- --- ---
Provincial Programs	\$343,238	<ul style="list-style-type: none"> <li>• Ad in tour operator brochure</li> <li>• Three consumer shows</li> </ul>	Trade future Consumer future	--- ---
Research	\$122,628	<ul style="list-style-type: none"> <li>• TAMS</li> <li>• Travel planners</li> <li>• Group travel outlook</li> <li>• US trade inventory</li> <li>• Conversion</li> </ul>	Consumer future Consumer future Trade future Trade future Evaluation	--- --- --- --- ---
Administrative and Contingency	\$171,934	<ul style="list-style-type: none"> <li>• Program management</li> <li>• Industry travel and meetings</li> <li>• Contingency (\$60,000)</li> </ul>	Administration Administration Administration	--- --- ---
<b>TOTAL</b>	<b>\$4,261,500</b>			<b>\$82.9</b>
<b>ROI: TOTAL US PROGRAM 2007</b>				<b>\$19.45:1</b>

*1. This amount represents spending for all of 2007, including January – March 2007 activities that were included in the 2006 – 2007 ACTP budget.*

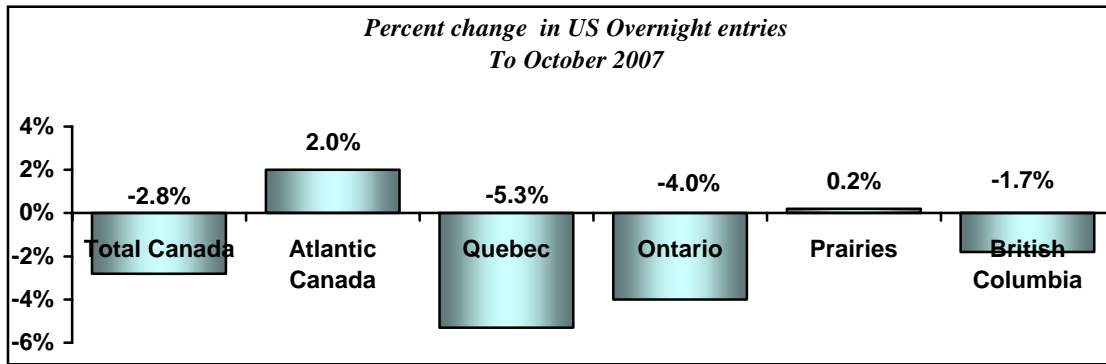
## 2.7 CONCLUSIONS: THE US MARKET PROGRAM

The US program was highly successful in 2007:

- The overall program exceeded its ROI objectives.
- The program also exceeded targets for inquiries and awareness.
- The Consumer Campaign exceeded its ROI objectives.
- The Trade Partnership Program met its objectives.
- Media Broker and Media Relations Programs exceeded their objectives.
- Programs and activities with future impacts were implemented as planned and are operating on schedule.
- Research is comprehensive and up-to-date.

## 2.8 EARLY INDICATORS FOR 2007

Although US market origin data for 2007 will not be available for several months, the current trend in US direct entries to Canada suggests a possible reversal of Atlantic Canada's recent declines. To the end of October, only Atlantic Canada is showing an increase in direct US arrivals over 2006 (the Prairies have registered a marginal increase of only 0.2%). This gain is being carried by increases in non-automobile traffic.



Source: Statistics Canada. *International Travel Survey, Preliminary Statistics, 2007.*

**SECTION 3**

***THE OVERSEAS MARKET***

### 3. INTRODUCTION

The Overseas Program is based on three separate plans directed to four specific markets. The European plan focuses on the United Kingdom (UK) and the German-speaking countries of Germany, Switzerland, and Austria. Two other plans have been developed for France and Japan.

#### 3.1 OBJECTIVES

The Overseas Marketing Program has the objectives of increasing visitation and revenues from all primary markets, with a target ROI of 6:1.

All overseas campaigns have the objectives of increasing trade and consumer awareness of the regional brand. Unlike the US market where four provincial brands are retained, the Overseas Program builds a regional brand for Atlantic Canada.

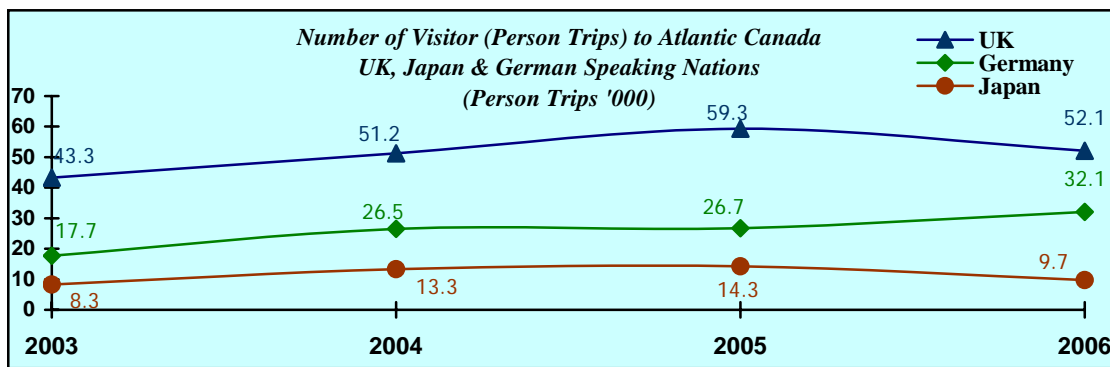
#### 3.2 PERFORMANCE TO DATE

##### 3.2.1 Visitation

The number of overnight visitors to Atlantic Canada from primary overseas markets totaled 93,900 in 2006. This represents a decline of 6.4 percent from the previous year (100,300 visitors).

Visitation from German speaking nations increased by 20.2 percent and reached a four year high of 32,100 overnight visitors. Visitation from the UK fell by 12.1 percent to 52,100 visitors. Japan suffered the greatest decline with visitation falling by almost one third (32.2 percent) to a three year low of 9,700 visitors.

France is not included in these figures as it is a new market area and programs were still in their start-up phase in 2006.

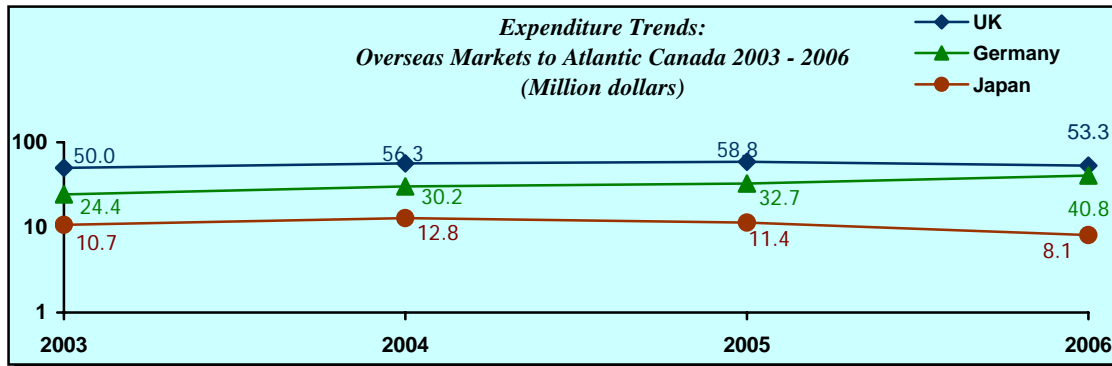


Source: Statistics Canada: International Travel Survey 2003, 2004, 2005 and 2006

### 3.2.2 Expenditures

Expenditures by visitors from overseas markets totaled \$102 million in 2006. This was essentially unchanged (down 0.7 percent) from the \$103 million spent the previous year.

Expenditures by visitors from German-speaking countries showed a very significant 24.8 percent increase to \$40.8 million in 2006. UK expenditures in Atlantic Canada fell by 9.4 percent to a three year low of \$53.3 million. Expenditures by visitors from Japan fell by 28.9 percent to a four year low of \$8.1 million.



Source: Statistics Canada. International Travel Survey, 2003- 2006

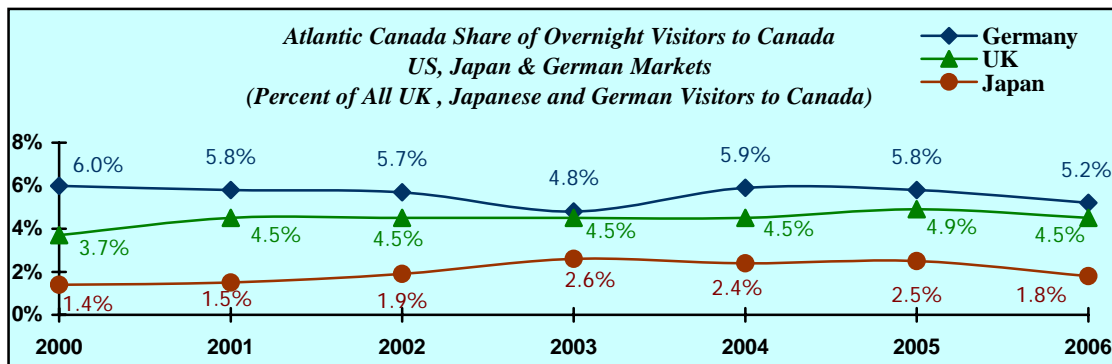
### 3.2.3 Market Shares

#### a. Visitation Shares

In terms of performance relative to the rest of Canada, all markets showed a drop in share of total visitors in 2006. Although visitation to Atlantic Canada from German markets was up by almost 25 percent, the regions share of total German visitors to Canada fell from 5.8 to 5.2 percent.

Atlantic Canada's share of visitation from the UK market fell from 4.9 to 4.5 percent. This dropped the region's share of UK visitation to the level it had run at for four consecutive years before temporarily increasing to 4.9 percent in 2005.

Atlantic Canada's share of total visitation from Japan dropped to a five year low of 1.8 percent. As France is currently in its first year of market development the impact of activities will not be seen until 2007.



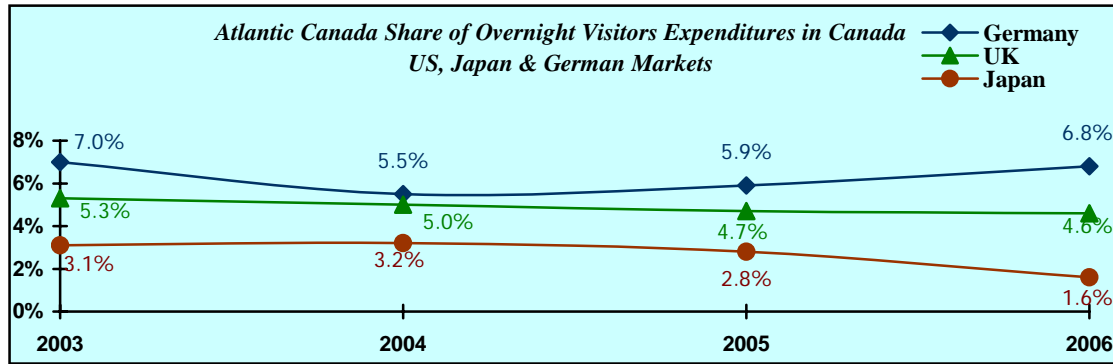
Source: Statistics Canada. International Travel Surveys, 2000 -2006



**b. Expenditure Shares**

Although Atlantic Canada’s share of total visitors from Germany declined in 2006, the regions share of total German expenditures in Canada increased from 5.9 to 6.8 percent.

The region’s share of total UK expenditures fell only slightly, from 4.7 to 4.6 percent. Share of expenditures by visitors from Japan suffered a significant decline, falling to a four year low of 1.6 percent.



Source Statistics Canada International Travel Surveys, 2003-2006

**3.2.4 Synopsis: overseas baseline position**

Atlantic Canada’s baseline or “going in” position in the overseas market was not strong in 2007. Only German speaking markets showed an increase in visitation and expenditures in 2006; relative to the rest of Canada, the region suffered a loss in share of visitors from all overseas markets.

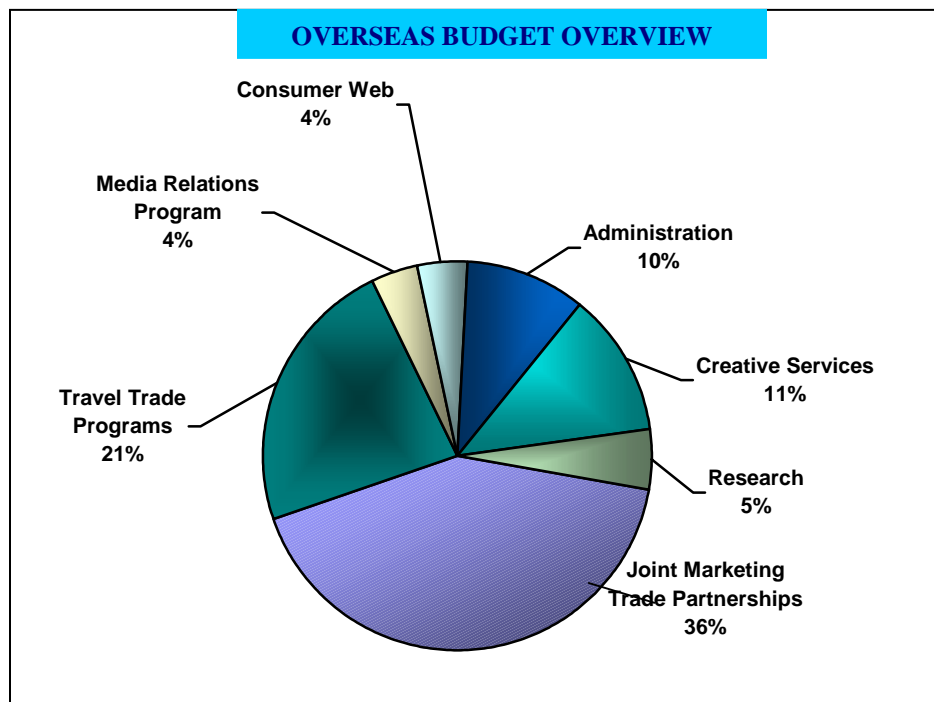
**3.3 OVERSEAS MARKETING PROGRAM: 2006**

**3.3.1 Budget Overview**

In contrast to the US program where approximately two-thirds of the budget is spent on consumer advertising, the largest share in overseas markets (65 percent) is spent on trade. The strategy of the Overseas Program is to integrate travel trade, consumer and media relations to maximize the effectiveness of the limited budget.

Overseas activities include joint marketing with tour operators; partnerships with the Canadian Tourism Commission; in-market travel trade promotions; media relations and participation in marketplaces, trade shows, and workshops. In Japan a regional sales manager is engaged for in-market sales and promotion.

In comparison to last year, there was a significant shift in spending from consumer and web marketing to trade programs in 2007.



Source: ACTP Marketing Program Budget 2007/2008. December 2007.

### 3.3.2 Budget Details

The following table provides detailed budgets for the three overseas market plans:

OVERSEAS BUDGET 2007/2008				
Budgeted Expenditures	UK/Germany	France	Japan	Total
Joint Marketing Partnerships	\$329,965	\$96,667	\$5,025	\$431,657
Seminars/Tradeshows	\$70,130	\$9,569	\$41,620	\$121,319
Trade Fam Tours	\$18,200	\$6,750	\$16,837	\$41,787
Media Relations (Promotional)	\$8,190		\$6,525	\$16,395
Media Relations (Fam Tours)	\$10,800	\$1,680	--	\$10,800
Consumer Advertising	\$36,655	\$2,537	\$6,891	\$46,083
Trade/Media support: Anne 100th	--	--	\$25,000	\$25,000
Regional Sales Manager	--	--	\$63,665	\$63,665
Creative Services and Collateral	\$104,400	\$15,082	\$5,900	\$125,382
Research*	\$50,000	----	---	\$50,000
Administration and Support	\$47,083	\$15,694	\$15,692	\$78,471
Shipping and Storage	\$7,500	\$2,000	\$4,000	\$13,500
Meeting Expenses	\$8,578	\$2,859	\$2,859	\$14,296
Industry Travel				
<b>Total Budgeted Expenditures</b>	<b>\$691,501</b>	<b>\$152,838</b>	<b>\$194,016</b>	<b>\$1,038,355</b>

\* CTC European Segmentation Research

Source: ACTP Marketing Program Budget 2007/2008. January 9, 2008. ACTP Secretariat.

### 3.4 OVERSEAS PROGRAM RESULTS

#### 3.4.1 Europe overview

Marketing activities in Europe were focussed on four areas:

- Tour wholesaler joint marketing partnerships
- Marketplaces and trade shows
- Media relations
- Co-op consumer advertising / web support

#### 3.4.2 Tour Wholesaler Joint Marketing Partnerships

Tour wholesaler partnerships are the leading direct revenue generators for the European program. The 2007 program was successful in generating \$7.8 million in expenditures in Atlantic Canada. It is estimated that \$3.7 million in expenditures is directly attributable to ACTP, based on ACTP's share of total program investment.

The 2007 program involved 14 partnerships and delivered an ROI (based on share of investment) of 15.58. The partnership program's ROI in 2007 was the highest of the past three years.

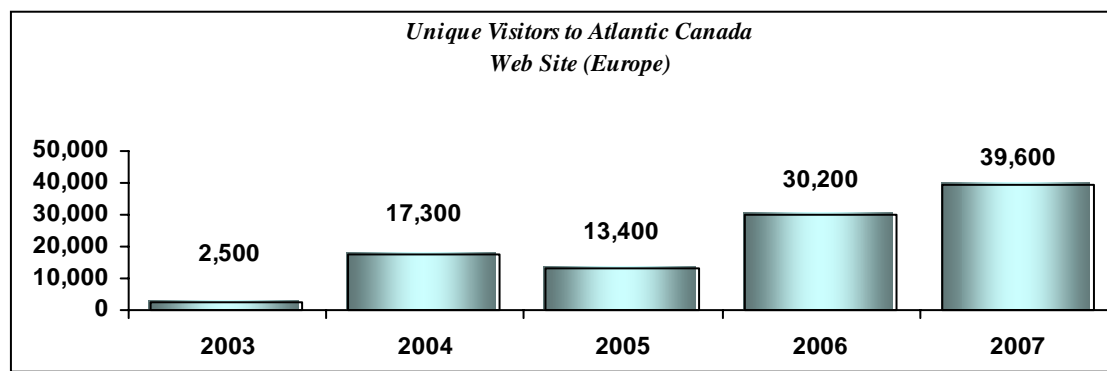
European Tour Wholesaler Partnership			
	2005	2006	2007
Number of Partnerships	15	15	14
Total ACTP Investments (\$)	\$246,800	\$308,100	\$239,800
Average Investment Partnership (\$)	\$16,462	\$20,500	\$17,100
Average Partner Investment	\$68,100	\$54,900	\$17,100
Total Expenditures in Atlantic Canada (\$ Million)	\$11.8	\$6.7	\$7.8
ACTP Credited Expenditures (\$ Million)	\$3.7	\$3.1	\$3.7
ROI (Based on Share of Investment)	\$15.00:1	\$10.00:1	\$15.58:1

Source: Secretariat. Market Share reports includes estimates for three non-reporting partners

#### 3.4.3 Consumer (co-operative) advertising and web activity

In 2007, consumer advertising was carried out in parallel with the tour wholesaler program and in partnership with the Canadian Tourism Commission. The program is linked closely with web support.

In 2007, visitation to the Atlantic Canada web sites increased by 31 percent, from 30,200 to 39,600 unique visitors. The following table illustrates web site inquiries only. It excludes unique sites contacted through e-marketing activities.



Source: Secretariat

### 3.4.4 Marketplaces, Trade Shows, and Seminars

The year 2007 saw the continuation of a close working relationship with the CTC. A main activity was conducting educational seminars with leading German tour operators and sales staff (Hamburg, Frankfurt and Munich). Similar sessions had been carried out in the UK in 2005. Within the UK, ACTP continued to participate in the Canada Specialist Program which supports Agents and tour operators who specialize in Canada.

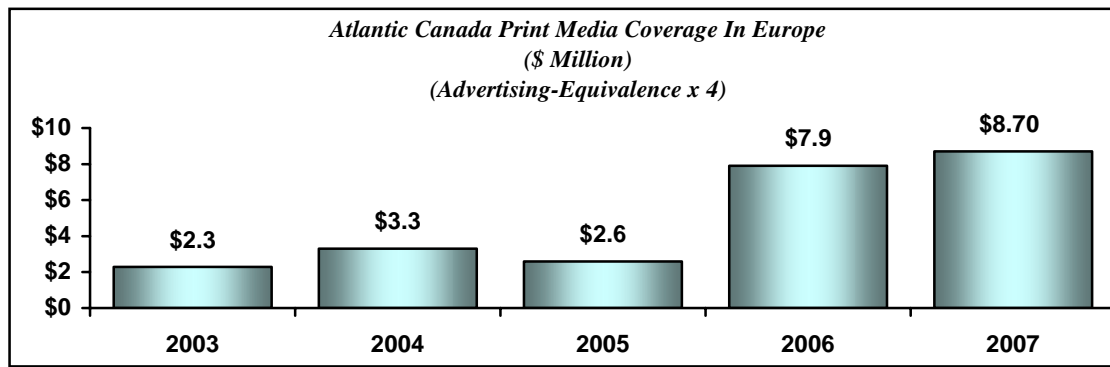
Three trade shows and one consumer show were attended. These included: CMT (Stuttgart); ITB (Berlin); Spotlight Canada (London) and WTM (London). Consumer promotions included an ACTP presence at Canada Day in Trafalgar Square.

Four trade FAMs involving 8 German and 19 UK trade representatives were conducted in 2007.

### 3.4.5 Media Relations

Media relations generated \$8.7 million in advertising-equivalence (using a multiplier of 4). The largest share of this (\$8.5 million) was in German-speaking countries.

Major media events in 2007 included sponsoring an Atlantic Canada dinner/reception for 13 leading travel media in the UK and hosting 8 German and 2 UK media on FAM trips.



Source: Secretariat

### 3.4.6 Research

ACTP is partnering in major consumer and trade research projects in the UK, Germany and France. This CTC led initiative is expected to provide ACTP with the most comprehensive and in depth information to date on these overseas markets. Final reports are expected to be available in early 2008. Implications for future marketing programs are likely to be significant.

### 3.5 FRANCE

France was added as a new overseas market in 2006-07. This followed a successful pilot project in 2005.

The market strategy being implemented in France is similar to the strategy employed in the UK and Germany. The focus is on joint marketing partnerships with Tour Operators and parallel partnership initiatives with the CTC.

Because the program is in the developmental phase, evaluation data are limited.

### 3.5.1 France tour wholesaler partnerships

Five tour wholesaler partnerships were undertaken in France at a total ACTP investment of \$34,900. To date data is available for only three of the five partnerships (72 percent of total investment). Because there is no history of past performance, results for non reporting companies have not been estimated.

The three reporting companies brought 227 visitors from France to the region. They spent an estimated \$531,500 of which \$315,200 is considered directly attributable to ACTP. The ROI for the three companies based on share of investment averaged 10.24:1.

France Tour Wholesaler Partnership	
	2007
Number of Partnerships	5
Total ACTP Investments (\$)	\$34,900
Average Investment Partnership (\$)	\$7,000
Average Partner Investment	\$7,000
Total Expenditures in Atlantic Canada (\$ Million)	\$531,300*
ACTP Credited Expenditures (\$ Million)	\$315,200*
ROI (Based on Share of Investment)	\$10.24:1*

\* Incomplete (includes 3 of 5 partnerships only)

Source: ACTP Secretariat

### 3.5.2 France Marketing Activities

A significant initiative undertaken in 2007 was the production and printing of a French language tour operator brochure, produced with assistance from the CTC. It was distributed at all consumer activities. Other marketing activities carried out in France in 2007-08 included:

- o Attending the leading tradeshow TOP RESA
- o Hosting 7 tour operators on trade FAM tours
- o Hosting 1 French journalist on a media FAM tour
- o Media coverage in France was equivalent to \$270,600 in 2007
- o France is included in the European research project (results expected in early 2008)

### 3.6 JAPAN

#### 3.6.1 Regional Sales Manager

The engagement of a regional sales manager and in-market promotional and marketing activities continues to represent the largest single expenditure in the Japanese market. In 2007-08, these expenditures accounted for approximately one third of ACTP's total investment in Japan.

Activities undertaken by the sales manager included attending seven major marketplaces or trade events, sales calls, hosting educational sessions, coordinating public relations events, and organizing trade partnerships.

#### 3.6.2 Japan Tour Wholesaler Partnerships

In 2007, two partnerships with Japanese tour wholesalers generated 44 Japanese visitors who stayed a total of 216 visitor nights and spent an estimated \$54,000 in the region that was directly attributed to ACTP (based on share of investment). The ROI for the program was 27:1.

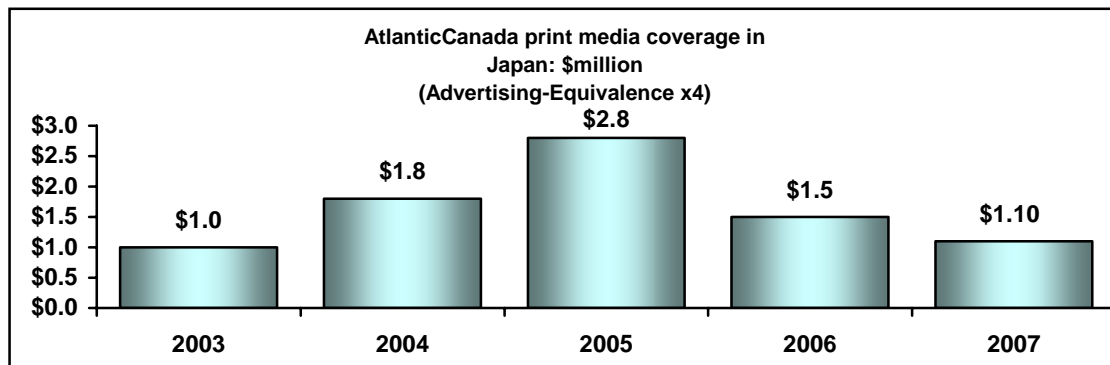
The year was very active in terms of travel trade FAM tours. A total of 25 Japanese tour operator representatives were hosted on FAM tours in 2007.

Japan Tour Wholesaler Partnership Program 2006-2007		
	2006	2007
Tour Wholesaler Partnerships	4	2
ACTP Investment	\$19,000	\$2,000
Passengers	338	44
Revenue Generated	\$97,300	\$54,000
ROI	5.12:1	27.00:1

Source: Secretariat

#### 3.6.3 Media Relations

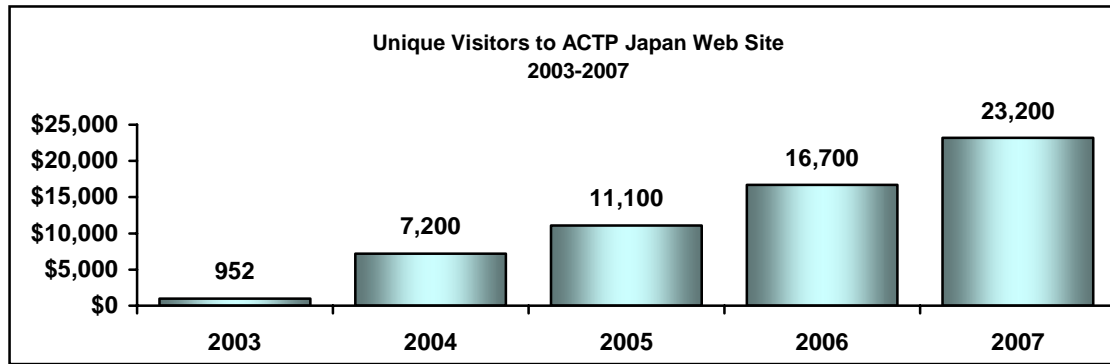
Media coverage resulting from media relations activities totalled \$1.1 million in 2007 (based on a multiplier of 4).



Source: Secretariat

### 3.6.4 E-Marketing & Web Activity

The number of Japanese visitors to the ACTP web site increased by 39 percent in 2007. The web site had a total of 23,200 unique visitors during the year. This was the fourth consecutive year of increase.



### 3.7 SUMMARY OF OVERSEAS PROGRAM PERFORMANCE

The Overseas Program delivered an ROI of 4.74: 1 in 2007. This was an improvement over last year's ROI of 4.00:1, but still short of its 6:1 objective. Performance measurements for the Overseas Program continue to be severely limited by including only four wholesaler partnership revenues.

Summary of Overseas Programs, Activities, and Impacts				
Program	Expenditure (\$)	Summary of Activities	Impact/ Result	Revenue (\$)
<b>UK and German-Speaking</b>				
Wholesaler Partnerships	\$239,800*	• 14 partnerships	Immediate (2007) trade ROI: 15.58:1	\$3,700,000
Consumer/ Web	\$36,700	• 39,600 web visitors	Future trade / consumer	
Trade Shows/Trade FAMs	\$88,300	• 1 consumer how • 3 trade shows • 4 FAMs	Future consumer Future trade	
Media Relations	\$19,000	• UK Promotions • 2FAMms	\$8.7 million Media future	
<b>France</b>				
Wholesaler Partnerships	\$34,900	• 5 partnerships	Immediate (2007) trade ROI: 10.24:1	\$315,000
Trade Shows / FAMs	\$16,400	• 1 trade show • 7 TO's on FAMs	Trade future	
Consumer/Web	\$2,500	• In development	Consumer future	
Media Relations	\$1,700	• 1 fam		
European Research	\$50,000	• Competitiveness and brand awareness	Consumer future Trade future	--- ---
<b>Japan</b>				
Wholesaler Partnerships	\$2,000*	• 2 partnerships	Immediate (2007) trade ROI: 27.00:1	\$54,000
Trade Shows/ promotions	\$58,400	• 4 attended	Trade future	

**ACTP Evaluation 2007 -2008  
(Year 2)**

trade FAM		• 25 TO's on FAMs	Trade future	
Consumer/ Web	\$6,900	• 23,200 web visitors	Consumer future	
Media Relations	\$6,500	• NoFAMs	\$1.1 million media coverage	
Regional Sales Manager	\$63,700	• Sales calls • Promotions	Trade future	
Creative services & collateral	\$125,400	• N/A •	N/A	
Shipping/Storage	\$13,500	• N/A	N/A	
<b>Administration</b>	\$92,800	• Management • meeting expenses	N/A	--
<b>TOTAL</b>	<b>\$858,500</b>			<b>\$4,069,000</b>
<b>ROI:</b>				<b>4.74:1</b>

\*Note: 2006 Tour Wholesaler partnerships in Europe France and Japan generated 2007 visitation and revenue. These partnerships were funded from the 2006/07 fiscal budgets for Europe France and Japan.

**3.8 CONCLUSIONS: OVERSEAS PROGRAM**

Overseas markets receive very mixed reviews in 2007:

- Germany looks good. Visitation and expenditures were well up in 2006 and momentum appears to be building.
- At best, the UK was flat 2006. While it's not falling it is also not moving...it has not increased in five years.
- Japan is in very tough shape. Everything was down again in 2006...visitation, expenditures and shares. The outlook for 2007 appears no better. Visitation to Canada from Japan is running 15 percent below last year.
- It is too early to comment on France.



**SECTION 4**

***CORPORATE COMMUNICATIONS STRATEGY***

#### **4. CORPORATE COMMUNICATIONS**

##### **4.1 OBJECTIVES**

The Corporate Communications Strategy has the objectives of:

- Creating an awareness of ACTP and its initiatives, successes and achievements among target tourism industry audiences in Atlantic Canada.
- Maintaining and increasing target audience support for ACTP its activities and related funding
- Identifying and demonstrating the benefits of federal/provincial/industry partnerships
- Identifying and demonstrating the benefits of regional cooperation in Atlantic Canada

##### **4.2 STRATEGY**

In 2007 the ACTP Secretariat developed a new communications strategy in consultation with the ACTP Communications Task Force. Implementation of the strategy required that more time and effort on the part of the Secretariat be devoted to Corporate Communications.

##### **4.3 ACTIVITIES**

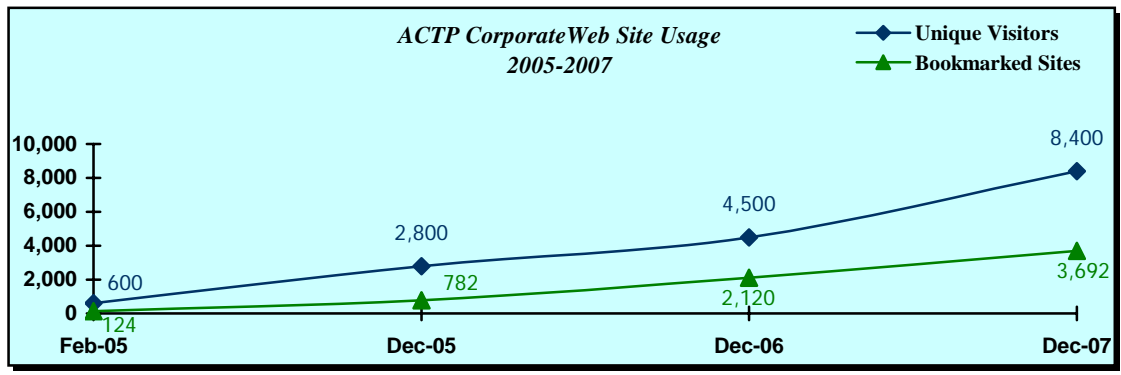
Activities undertaken in 2007 included:

1. Update of ACTP's Multimedia presentation and tradeshow materials.
2. Participation in three Industry Association Conferences/Summits. Two more are scheduled for early 2008. Presentations were made at two conferences and two more are scheduled. All four Provinces will be included over the course of the year.
3. Preparation and distribution of seven newsletters to the four Tourism Industry Associations for inclusion in Association newsletters/mailings..
4. Launch of a new program in September that involves the Secretariat sending out e-news letters directly to more than 1,300 industry and partner websites. This bi-monthly program attained 36.6 percent "opens" in November/December (499 readers).
5. Editorial efforts that resulted in Atlantic Business magazine (13,900 subscribers) carrying a six page article on ACTP in the July/August 2007 edition.
6. Internal communications that provided eight briefings to new committee members and one financial presentation to Management Committee.
7. Regular updating of the corporate website including the posting of more than twenty new research reports.

**4.4 CORPORATE WEBSITE USAGE**

In the past two years (since December 2005) the number of unique or different visitors to the ACTP web site has tripled from 2,800 to 8,400.

The number bookmarking the site has increased almost four times over this period, from 782 in 2005 to 3,692 in 2007.



**SECTION 5**

***SUMMARY AND RECOMMENDATIONS***

**5.1 ACTP PROGRAM SUMMARY 2007-08**

In 2007-08 the ACTP program was successful in meeting its program objectives. The combined US and Overseas programs attained an overall ROI of approximately 17:1. Based on the distribution of expenditures and objectives for the two programs the overall ROI objective was approximately 13:1.

Revenues directly attributable to ACTP programs totaled approximately \$87.0 million in 2007.

<b>ACTP SUMMARY 2007-2008</b> <i>Expenditures and Impacts</i>				
	<b>BUDGET</b>	<b>VISITOR EXPENDITURES</b>	<b>ROI</b>	<b>NON-EXPENDITURE IMPACT</b>
<b>USA</b>				
<b>Consumer Advertising</b>	\$3,094,000	\$82,100,000	\$26.52	---
<b>Travel Trade</b>	\$313,000	\$800,000	\$2.55	---
<b>Media Relations</b>	\$113,300	---	---	\$11.3M Advertising Equiv
<b>Media Broker</b>	\$103,500	---	---	\$1.4M Savings & Value
<b>Provincial Programs</b>	\$343,200	---	---	---
<b>US Research</b>	\$122,600	---	---	---
<b>Admin/ Other</b>	\$171,900	---	---	---
<b>(Sub Total USA)</b>	<b>\$4,261,500</b>	<b>\$82,900,000</b>	<b>\$19.45</b>	<b>---</b>
<b>OVERSEAS</b>				
<b>Europe Trade</b>	\$328,100	\$3,700,000	\$11.28	---
<b>Europe Other</b>	\$55,700	---	---	\$8.7M Advertising Equiv
<b>France Trade</b>	\$51,300	\$315,000	\$6.14	---
<b>France Other</b>	\$4,200	---	---	\$0.3M Advertising Equiv
<b>Japan Trade</b>	\$124,100	\$54,000	\$0.78	---
<b>Japan Other</b>	\$13,400	---	---	\$1.1M Advertising Equiv
<b>Europe Research</b>	\$50,000	---	---	---
<b>Admin/ Other</b>	\$231,700	---	---	---
<b>(Sub Total Overseas)</b>	<b>\$858,500</b>	<b>\$4,069,000</b>	<b>\$4.74</b>	<b>---</b>
<b>TOTAL PROGRAM</b>	<b>\$5,120,000</b>	<b>\$86,969,000</b>	<b>\$16.99</b>	<b>---</b>

## **5.2 ACTION TO 2006-2007 RECOMMENDATIONS**

Last year's evaluation (2006-2007) made five recommendations for immediate action or consideration. This section reviews the status of these recommendations.

### **1. The US Market**

Because of the significant decline of the New England market and the forecast that the decline would continue for the fourth consecutive year in 2006, it was recommended that ACTP begin the process of thoroughly reviewing its US market strategy.

#### *Status*

*A series of research projects undertaken by ACTP in 2007 confirmed that the New England market continues to represent potential for Atlantic Canada and that the Atlantic Provinces hold a solid position relative to leading Canadian competitors.*

### **2. Overseas Markets**

It was recommended that the Overseas Program continue as scheduled (including France) and that the possibility of adding new and additional performance criteria be examined.

#### *Status*

*The Overseas Program was implemented as scheduled in 2007-2008. New performance measures were not developed however tracking of what may become key source data (web usage) continued.*

### **3. Marketing Committee**

A survey of Marketing Committee Members found delays associated with the approval process were a major strain on the new structure. It was recommended that the process be reviewed.

#### *Status*

*The process was jointly reviewed and it was determined that it was essentially a "point in time" issue. The new Committee is now reported to be functioning very efficiently.*

### **4. ACTP Leadership**

The surveys of Management and Marketing Committees which were carried out as part of last years evaluation found considerable confusion and uncertainty surrounded ACTP's leadership roll. It was recommended that the issue be clarified.

#### *Status*

*The issue was discussed at the Management Committee level and the situation is now considered clarified.*

### **5. Communications**

Last years evaluation found members of both Marketing and Management Committee felt little progress had been made toward communicating the value and importance of ACTP to the private sector. The evaluation concluded that the expectations of committee members far exceeded what was possible and the expectations of the Secretariat and the strategy should be reassessed.

#### *Status*

*The Communications strategy and expectations were reviewed. New higher profile and more proactive initiatives such as the e-newsletter have been introduced and the year appears to have been one of solid improvement.*

### **5.3 RECOMMENDATIONS: 2007-2008**

#### **1. Overseas**

The Overseas Program continues to struggle with meeting its ROI objectives. This is influenced by the fact that only tour wholesaler partnerships provide expenditures which can be measured and credited to the program. Web inquiries now total 39,000 in Europe and 23,000 in Japan. At these inquiry levels it would require conversion rates of only 4 percent in Europe and 2 percent in Japan to meet the programs 6:1 objectives.

*For purposes of evaluation and especially for purposes of strategy decisions it is recommended that the feasibility of undertaking at least periodic conversion studies of web inquiries in overseas markets be examined.*

#### **2. Japan**

The Japanese market is obviously in trouble. The region has been experiencing consistent declines in Japanese visitors and expenditures. Perhaps more important it has also been losing share. The immediate situation is not positive. Japanese visitation to Canada in 2007 is running down 15 percent from last year.

*It is recommended that the Japanese market and the strategy for Japan be reviewed to determine if changes are required.*

#### **3. New activities**

The Provincial campaign in Alberta was the first activity undertaken in response to a major policy change by ACTP. As it was the first activity in a new market its performance should be very clearly defined.

*It is recommended that all new activities be capable of providing “stand alone” evaluations as per ACTP’s ongoing activities in US and overseas markets.*

#### **4. Performance indicators**

There is a need for a more comprehensive system of performance indicators for ACTP. Requirements range from a single source understanding of overall tourism performance and the business environment in Atlantic Canada to a more formal monitoring of ACTP’s non marketing specific activities.

*It is recommended that the tourism performance indicators which have been drafted by ACTP (see appendix) be implemented with initial data available in one year (end of Agreement evaluation).*

**APPENDIX**



**Tourism Performance Indicators  
Atlantic Canada Tourism Partnership**

<b>Indicator Level</b>	<b>Objective</b>	<b>Success Indicator</b>	<b>Unit of Measurement</b>	<b>Data Source</b>	<b>Responsibility</b>	<b>Timing</b>
<b>1.0 Industry Indicators</b>	<b>1.1 Overnight Visits</b>	<b>1.1.1 Total province visits</b>	#	Stats Canada	ACOA	Annual
		<b>1.1.2 Domestic province visits by Cdn Market</b>	#	Stats Canada	ACOA	
		<b>1.1.3 US province visits by US region</b>	#	Stats Canada	ACOA	
		<b>1.1.4 Overseas province visits by Market</b>	#	Stats Canada	ACOA	
	<b>1.2 Spending by Overnight Visitors</b>	<b>1.2.1 Total Visitor Spending</b>	\$	Stats Canada	ACOA	Annual
		<b>1.2.2 Domestic Visitor Spending by Cdn Market</b>	\$	Stats Canada	ACOA	
		<b>1.2.3 US Visitor Spending by US Region</b>	\$	Stats Canada	ACOA	
		<b>1.2.4 Overseas visitor spending by Market</b>	\$	Stats Canada	ACOA	
	<b>1.3 Tourism's Contribution to Provincial Economies</b>	<b>1.3.1 Tourism GDP</b>	\$	Provinces	Provinces	Annual
		<b>1.3.2 Taxes</b>	\$	Provinces	Provinces	
		<b>1.3.3 Tourism Employment</b>	#	Provinces	Provinces	

**Tourism Performance Indicators  
Atlantic Canada Tourism Partnership**

<b>Indicator Level</b>	<b>Objective</b>	<b>Success Indicator</b>	<b>Unit of Measurement</b>	<b>Data Source</b>	<b>Responsibility</b>	<b>Timing</b>
<b>2.0 Brand Enhancement</b>	<b>2.1 Brand Awareness</b>	<b>2.1.1 Unaided destination awareness</b> <b>2.1.2 Aided destination awareness</b> <b>2.1.3 Interest in visiting</b> <b>2.1.4 Likelihood of visiting</b>	% % % %	<b>Annual Travel Intentions Surveys</b>	<b>ACOA</b> <b>ACOA</b> <b>ACOA</b> <b>ACOA</b>	<b>Annual</b>

**Tourism Performance Indicators  
Atlantic Canada Tourism Partnership**

Indicator Level	Objective	Success Indicator	Unit of Measurement	Data Source	Responsibility	Timing
<b>3.0 Marketing Programs/Campaigns</b>	<b>3.1 R.O.I on Consumer Media Program</b>	<b>3.1.1 Inquiries</b> <b>3.1.2 Cost Per Inquiry</b> <b>3.1.3 Converted Party Visits</b> <b>3.1.4 Cost Per Converted Inquiry</b> <b>3.1.5 Spending per Converted Party</b> <b>3.1.6 Revenues Generated</b> <b>3.1.7 Return-on-Investment</b>	# \$ # \$ \$ \$ \$	<b>ACTP Conversion Studies</b>	<b>Provinces &amp; ACOA</b>	<b>Annual</b>
	<b>3.2 Travel Trade</b>	<b>3.2.1 Tour Wholesaler Partnerships Formed</b> <b>3.2.2 Dollars leveraged by Partnerships</b> <b>3.2.3 Packages Sold</b> <b>3.3.3 Revenues Generated</b> <b>3.3.4 Return-on-Investment</b>	# \$ # \$ \$	<b>Tour Wholesaler Partnership Agreements</b>	<b>ACTP Program Managers</b>	<b>Annual</b>
	<b>3.3 Media Relations</b>	<b>3.3.1 Volume of Articles / Editorial Generated</b> <b>3.3.2 Value of Articles / Editorial Generated</b>	# \$	<b>Media Monitoring</b>	<b>ACTP Program Managers</b>	<b>Annual</b>

**Tourism Performance Indicators  
Atlantic Canada Tourism Partnership**

<b>Indicator Level</b>	<b>Objective</b>	<b>Success Indicator</b>	<b>Unit of Measurement</b>	<b>Data Source</b>	<b>Responsibility</b>	<b>Timing</b>
<b>4.0 Research</b>	<b>4.1 Provide Timely Market Information &amp; Data</b>	<b>4.1.1 Market Trends Reports</b> <b>4.1.2 Market Performance Reports</b> <b>4.1.3 S.W.O.T / Segmentation Reports</b> <b>4.1.2 Adoption of information collected</b>	# # # #	<b>Reports; Data; Presentations; Evaluations; etc.</b>	<b>ACOA in partnership with the provinces</b>	<b>Annual</b>
	<b>4.2 Identify Niche &amp; Emerging Markets &amp; Products</b>	<b>4.2.1 Development of a strategy to identify high-yield markets</b> <b>4.2.2 Identification products/experiences linked to high-yield markets</b>	N/A  #	<b>TBA</b>  <b>Segmentation; S.W.O.T; T.A.M.S.; Evaluations; etc.</b>	<b>ACOA in partnership with the provinces</b>	<b>Annual</b>

**Tourism Performance Indicators  
Atlantic Canada Tourism Partnership**

<b>Indicator Level</b>	<b>Objective</b>	<b>Success Indicator</b>	<b>Unit of Measurement</b>	<b>Data Source</b>	<b>Responsibility</b>	<b>Timing</b>
<b>5.0 Corporate &amp; Learning</b>	<b>5.1 Financial Sustainability &amp; Accountability</b>	<b>5.1 Budgets &amp; variances 5.2 Admin &amp; overhead 5.3 Evaluations</b>	N/A	Annual & End-of-Agreement Evaluations	Secretariat	Quarterly & Annual
	<b>5.2 Corporate Communications</b>	<b>5.2.1 Newsletters 5.2.2 Web blasts / links 5.2.3 Editorials / press releases</b>	# # #	Secretariat	Secretariat	Annual
	<b>5.3 Horizontal Integration</b>	<b>5.3.1 Industry engagement 5.3.2 Provincial engagement 5.3.3 Federal engagement 5.3.4 Extent marketing strategies/plans are embedded in industry/provincial/federal strategies</b>	N/A	Annual & End-of-Agreement Evaluations	Secretariat	Annual
	<b>5.4 Learning &amp; Innovation</b>	<b>5.4.1 Knowledge gained / adopted</b>	N/A	Annual & End-of-Agreement Evaluations	Secretariat	Annual