



Atlantic Canadian Tourism Partnerships

Presented to:
International Aboriginal Tourism Conference



Atlantic Canada
Opportunities
Agency

Agence de
promotion économique
du Canada atlantique



Atlantic Tourism Economy

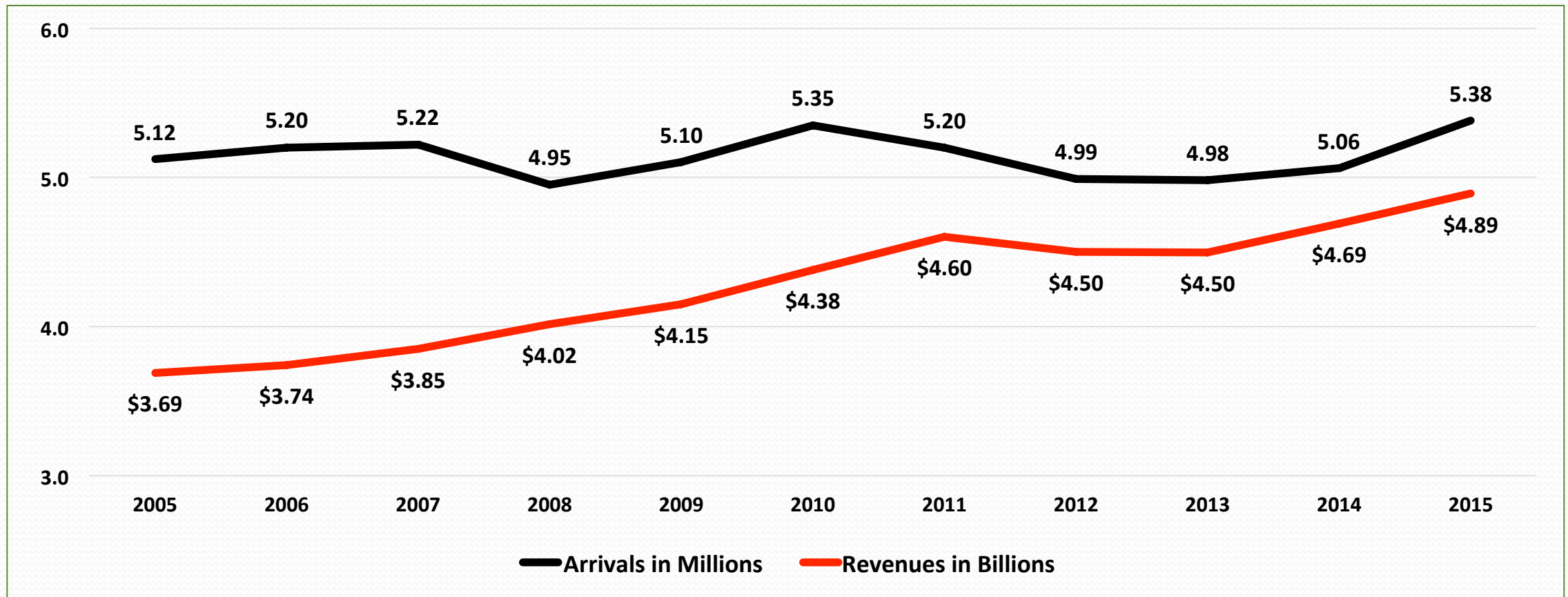


Tourism is of strategic importance to Atlantic Canada:

- **With a population of just 2.3 million, Atlantic Canada hosts in excess of 5 million visitors annually.**
- **Tourism-related revenues reached an estimated \$4.89 billion in 2015.**
- **Tourism directly supports almost 9,600 tourism businesses & 57,000 (FTEs) jobs for Atlantic Canadians.**
- **When expressed as a % of regional GDP, tourism revenues account for 4.4% of Atlantic Canada's GDP.**
- **Domestic markets account for 80% of non-resident, tourism-related visits.**
- **The Northeastern region of the USA & the UK are Atlantic Canada's most lucrative international markets. China is its fastest growing market.**

Trends in Non Resident Arrivals & Revenues

Atlantic Canada



2016 Tourism Performance Indicators

Provincial Performance Indicators - Preliminary



Provincial tourism indicators – Jan 1 to Sept 30, 2016 compared to the same period in 2015:

- NS - 8% increase in non-resident visits & 8.5% increase in revenues.
- PE - 7% increase in non-resident visit & 6% increase in revenues.
- NB - 5% increase in non resident visits & 6% increase in revenues.
- NL - 5% increase in non resident visits & 5% increase in revenues.

Atlantic Tourism Outlook

Short & Medium Term Outlook Percentage Growth

		2017	2018	2019	2020
NL	Visits	1.6%	2.2%	2.1%	2.0
	Revenues	5.2%	4.5%	4.5%	4.4%
NS	Visits	2.2%	1.5%	1.4%	1.3%
	Revenues	5.4%	4.4%	4.0%	3.8%
NB	Visits	2.3%	1.9%	1.8%	1.2%
	Revenues	5.1%	4.5%	4.3%	3.5%
PE	Visits	2.9%	2.8%	2.3%	2.1%
	Revenues	5.9%	5.3%	4.6%	4.5%

The Conference Board of Canada's short to mid-term outlook for tourism in Atlantic Canada is positive:

- Visitation is expected to grow by more almost 2% a year over the next 4 years.
- Revenues are expected to grow more than 4.5%.
- Much of this growth will be from international markets.



ACOA's Support to Tourism



ACOA's Delivery Model for Tourism



ACOA has a diversified delivery model for tourism.

- Involves all 4 ACOA regions.
- Involves Tourism Atlantic as a head office function.

ACOA's Tourism Regions



ACOA's 4 Regional Offices provide support to tourism projects that are province specific & respond to provincial priorities:

- **Product development; training & mentoring; strategic plans & studies; marketing initiatives; etc.**
- **Primary point of interaction with the tourism industry in that province.**
- **Work in partnership with the local provincial government.**
- **Work in partnership with local tourism operators & industry associations.**
- **Integrate tourism initiatives into local community development initiatives.**

Tourism Atlantic



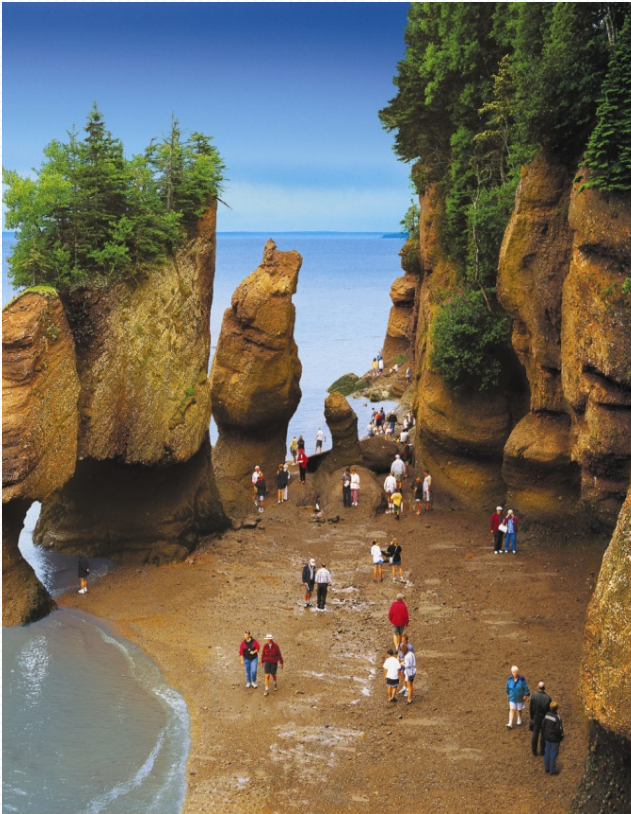
ACOA's Tourism Atlantic Unit responds to tourism projects, issues & policies that are pan-Atlantic in nature:

- Works in partnership on strategic initiatives with all four provincial governments, all four provincial tourism industry associations, industry groups, etc.
- Fashions & administers pan Atlantic partnerships for training & capacity building, experiential & explorative product development, strategic marketing initiatives, market research & intelligence, etc.
- Leads in setting ACOA's strategic priorities for tourism -- modernizing & realigning tourism programming, refocusing tourism investments & addressing regional tourism competitiveness issues.
- Policy, advocacy & coordination – Federal Tourism Strategy, Atlantic Growth Strategy, Parks Canada, Canadian Heritage, Tourism Industry Associations, governments of the four Atlantic Provinces, etc.

ACOA's Tourism Partnerships



Strategy's Four Pillars



ACOA's Growth Strategy for Tourism is built on four pillars that include:

Strategic Marketing Partnerships

Training & Capacity Building

Experiential & Niche Product Development

Outreach & Partnerships

Atlantic Canada Tourism Partnership (ACTP)

Strategic Marketing Partnership



ACTP is a nine member, pan-Atlantic, international marketing partnership comprised of Tourism Atlantic, Four Atlantic Provinces & Four TIAs:

- Delivers research driven & fully integrated marketing campaigns into international markets
- ACTP was originally established in 1991 – eight consecutive agreements
- Current project: \$19.95 M
 - ACOA - 50% or \$9.98 M
 - Four Atlantic Provinces - 33% or \$6.58 M
 - Four TIAs - 17% or \$3.39 M



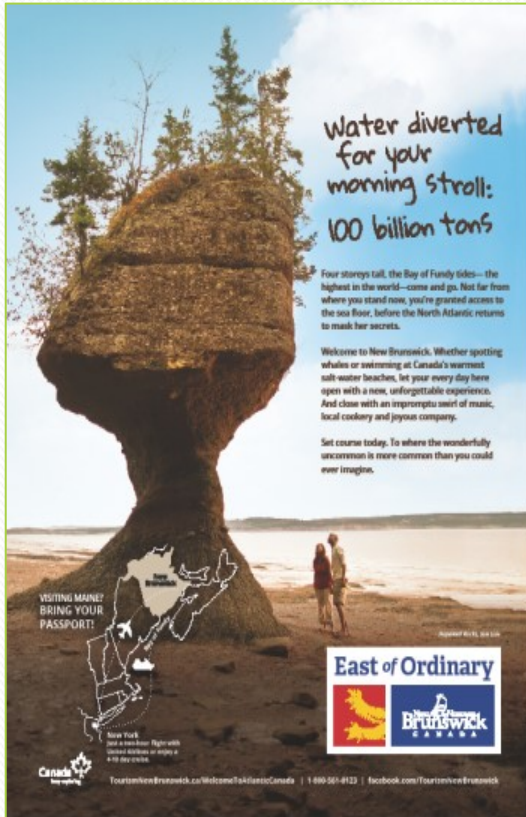
Why?



ACTP promotes Atlantic Canada as a premier leisure travel destination in priority international markets in the United States & the United Kingdom

- **Extends the reach of provincial tourism brands in the Mid Atlantic & New England regions of the United States.**
- **Delivers a regional, Atlantic Canada tourism brand into priority markets in the United Kingdom.**

Significance



- ACTP is a long standing federal, provincial & industry partnership - **eight consecutive agreements**.
- ACOA's largest tourism file & an important component of ACOA's Tourism Strategy.
- Deemed to be a **"best practice"** in Federal / Provincial / Industry marketing partnerships.
- Levers & advantages Destination Canada's efforts in overseas markets of common interest.
- Directly supports the Government of Canada's Federal Tourism Strategy.



Benefits



- **Creates regional synergies in tourism marketing & market research.**
- **Allows the four Atlantic Provinces & industry to penetrate markets that are mostly inaccessible, individually.**
- **Intensifies Atlantic Canada's international tourism marketing effort by generating marketing economies & efficiencies at the consumer, travel trade & media-relations levels.**
- **Maximizes marketing efficiencies - activities that have tactics common to all four Atlantic Provinces.**

Strategic Directions – Consumer Advertising



Focus on high potential / high yield lifestyle markets:

- Exurban Explorers
- Outdoor Elite
- Young Sophisticates

Increased media efficiencies:

- Common media plan
- Common media planner
- Common media buyer

Strategic Directions – Travel Trade



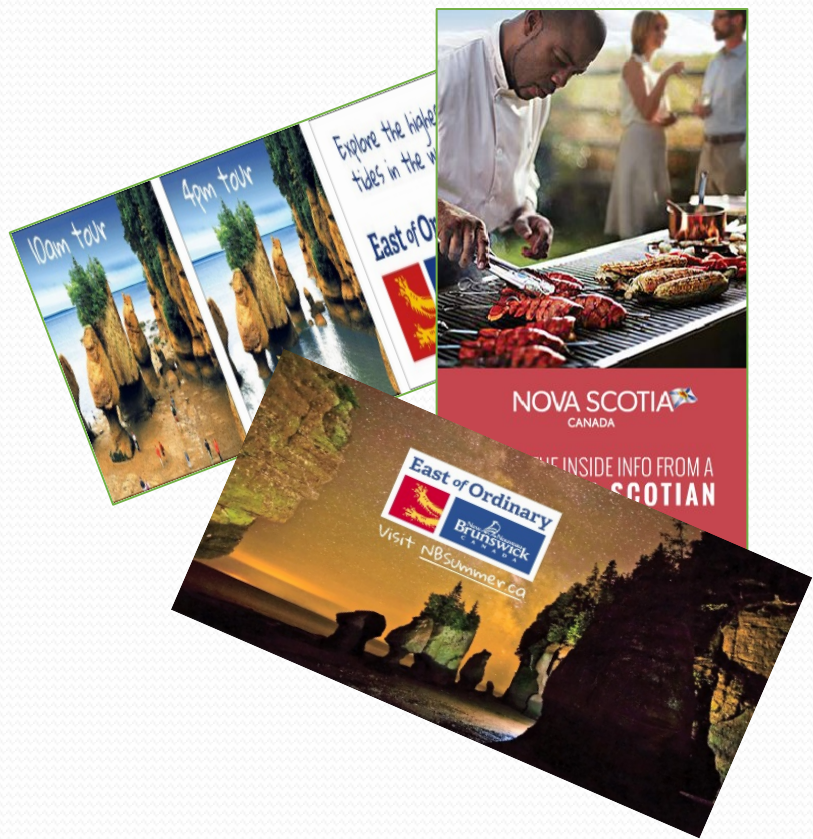
Focus on Emerging Trade Channels:

- Travelocity
- Expedia

Joint Marketing Agreements:

- In-market & receptive tour wholesalers, operators, etc.

Strategic Directions – Media Relations



Focused / integrated approach to Media / Public Relations:

- Greater use of media relations to provide the inspiration for travel.
- Bring **focus** to the uniqueness of Atlantic Canada.
- Greater use of media relations to reach lifestyle markets.
- Focus on high impact media events.
- Closer ties with Destination Canada's media relations activities in the U.K.

ACTP's Impacts

"The welcome is warm and the coastline, spectacular."

Join the experience that relaxes, rejuvenates, and reshapes the soul.

TWO-WEEK SEACOAST HOLIDAY PACKAGES start at just £969*

**Price based per person, double occupancy and includes car rental, accommodations & activity.*

Canada keep exploring

Atlantic Canada
New Brunswick • Prince Edward Island
Newfoundland & Labrador • Nova Scotia

AtlanticCanadaHoliday.co.uk/FT

Since inception, ACTP has generated more than:

- 3.5 million inquiries
- 800,000 party visits
- \$1.0 billion in revenues
- Average ROI of \$15.00 for every \$1.00 invested in marketing



Atlantic Canada Cruise Association

Strategic Marketing Partnership



ACCA is a \$1.15 million marketing partnership:

- Tourism Atlantic, Parks Canada, 4 Atlantic Provinces, Ports & Industry partners
- Partner (5) & Niche (9) Ports
- Markets Atlantic Canada as a three-season cruise destination in international markets
- Works with all major cruise lines that sell Canada New England cruise product
- 27% growth in cruise activity since 2009

Since 2009 ACCA has generated:

- 2,300 port visits by cruise ships
- 5.1 million passenger & crew visits
- \$450 million in export revenues



Training & Capacity Building

Program - Examples	Description
Gros Morne Institute Sustainable Tourism (GMIST)	Advances the quality & sustainability of tourism experiences by providing training in sustainable tourism practices, experiential tourism & eco-adventure tourism
Strategic Tourism Expansion Program (STEP)	Guides communities through a strategic process of building & executing a Sustainable Tourism Action Plan
Tourism Technology.Com	Provides technology support, mentoring & consultation services to SME's
Tourism Best Practices	GMIST coordinates & manages the Tourism Best Practices Program
Accelerated Market Readiness	Drives innovations in market readiness for individual SME's
Your Atlantic Canada Experience	Measures visitor satisfaction & allows Atlantic operators to identify their individual product/service strengths & weaknesses



Experiential & Niche Product Development

Program - Examples	Description
Atlantic Golf Organization	Development and Promotion of the Atlantic Canada Golf Market
Economusé	Undertake product development & marketing of artisans in Atlantic Canada
Commission du tourisme acadien du Canada atlantique (CTACA)	Development & marketing of experiential travel products under the Experience “Acadie” brand
Atlantic Canada China Partnership	Product development and promotion of Atlantic Canada for the China tourism market
Trade Readiness	Develop & market an international travel trade readiness program for Atlantic Canada



Outreach & Engagement



Outreach & engagement activities are designed to focus government & industry attentions on a coordinated, strategic & regional approach to tourism development:

- Collaborations at the federal level – Innovation, Science & Economic Development Canada (Federal Tourism Strategy); Destination Canada; Parks Canada; Canadian Heritage; CEDQ; FEDNOR, etc.
- Collaborations at the province level – Provincial Tourism Departments & Agencies; municipalities; etc.
- Collaborations at the industry level – Tourism Industry Associations; Destination Marketing Organizations; industry groups; etc.



Thank You

**Rob McCloskey, Director General
Tourism Atlantic**

