PEI Tourism Research Model
Final Report

Submitted to
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1. Introduction

The Tourism Industry Association of Prince Edward Island (TIAPEI) and the PEI Department of Economic Development and Tourism (subsequently referred to as *the Department*) embarked on a process to evaluate the current tourism research platform and methods used by the Province and TIAPEI. This *PEI Tourism Research Model Final Report* is a result of that collaboration.

2. Purpose and Objectives

The overall purpose of this project was to develop a forward-looking tourism research model for PEI. Specific objectives were to:

1. Evaluate the strengths and weaknesses of the Department's: i. current performance management/measurement tools, and ii. overall tourism research platform, with consideration to a delivery model and major tourism data resources;
2. Identify the responsibility of the Department versus third-party or contracted research (for data collection, impact studies, tracking, and conversion studies);
3. Identify relevant: i. performance measurement tools, and ii. research platforms being deployed in selected other North American jurisdictions that may provide insights useful to developing the tourism research model for PEI;
4. Prepare and present a top-line report on key findings from #3 above in comparison to PEI's current research platform;
5. Conduct an industry research needs analysis;
6. Develop three (3) best practice case studies from Canada and the United States;
7. Identify and recruit expert panelists to assess PEI's current performance/measurement tools;
8. Develop top-line reports to highlight results of the industry needs analysis, best practice case studies, and expert panel reviews.
9. Recommend enhancements to the Unit's performance management/measurement tools in a final report consolidating the top-line reports noted above.

3. Methods

There were four major inputs to evaluating PEI's current research model and platform:

1. Review of the existing tourism research and platform used by PEI;
2. Stakeholder interviews: with 29 tourism industry stakeholders;
3. Best practices review: of three destinations with leading research practices; and,
4. Expert reviews: a panel of seven North American experts was selected to review the top-line reports and provide their perspectives on PEI's approach.

Summary top-line reports were prepared and served as detailed accompanying documents to the Final Report. These reports are:

1. *Review of Existing Research, Documentation, and Other Resources, August 2015.*
2. *Stakeholder Interview Summary: Top-line Report, August 2015.*
3. *Three Destinations – Best Tourism Research Practices Top-Line Report, August, 2015.*

4. PEI Research Review

Strengths: The overall research platform is basically sound, consisting of the visitor Exit Survey (currently every five years), the Monthly Tourism Indictors and annual Economic Impact analysis. The research platform is well conceived and a variety of empirical and panel studies exist, in additional to a well-designed internal marketing dashboard.

Weaknesses: while a great deal of data are collected, the level of analysis and interpretation is limited and research releases are slow, particularly in 2014 with the Exit Survey and Festivals and Events research. Visitor satisfaction research is limited.

5. PEI Stakeholder Interviews

Consultations with 29 stakeholders revealed that most use research but some are unaware of all that is available through the Province or Centre for Tourism Research (CTR). Most frequently used information/research studies are: 1. The PEI monthly *Tourism Indicators*, 2. Exit Survey results (when available), 3. Accommodation Occupancy (part of *Tourism Indicators*), 4. Google analytics, 5. Meetings and Conventions data, and 6. Tourism Forecasts; stakeholders view the first four as most useful for decision-making.

Stakeholders note the need for research and generally recognize the diversity of data available. However, improvements need to be made in the areas of: 1. Outreach, information access, 2. Awareness of what is available, 3. Timelines, 4. CTR role clarification, and 5. Trends and comparative information research.

6. Best Tourism Research Practices Review

Three destinations with best tourism research practices were selected to be profiled: i. British Columbia, ii. Montana, and iii. Minnesota. Best practices include the need for: 1. A clear research agenda, 2. Industry input into research priorities, 3. Strong research delivery access and communications, 4. Availability of research handbooks/ survey kits; 5. Communication/ outreach -- an active communication program and access to information; 6. Social media indicators; 7. Clear role definitions (who does what research), 8. Need for cooperation and partnerships.

7. Expert Panel Review of PEI Tourism Research Platform

A panel of seven experts from North America was selected to review the PEI research platform and performance measurement tools. These experts conclude that PEI is generally getting good value for its tourism research dollar, particularly given its limited budget.

Strengths include the view that the research platform is well-conceived; the foundation is strong and includes: 1. An economic impact model , 2. Monthly Tourism Indicators, and 3. the Exit Survey. Main weaknesses in PEI's tourism research approach are: 1. Little interpretation, 2. Weak communication and outreach, 3. Limited HR capacity, 4. Slow release times, 5. Multiple locations for data, and 6. Uncertainty over research roles. Recommendations made by experts address these deficiencies and are reflected in the Final Report recommendations.

8. Recommendations -- PEI Tourism Research Model

● **Strategy-Related**

1. **Position the Department of Economic Development and Tourism** as the lead tourism research organization for the Province. The Department should oversee and manage the work of the CTR.
2. **Create a Tourism Research Advisory Group**: made up of the Department, TIAPEI, ACOA, and a UPEI Research Expert. Roles include developing a research agenda and directing future PEI research.
3. **Integrated Tourism Research Delivery Model**: Consider an integrated research delivery model that includes the Province, the CTR and the Advisory Group – where the Province and CTR work in partnership to deliver needed research.
4. **Research Agenda:** Develop a clear, annual research agenda, vetted by industry.
5. **Strengthen Research Capacity:** within the Department and CTR.
6. **University Linkages:** Rebuild and strengthen the relationship with UPEI for expertise, input and student interns.

● **The Research Platform**

Strengthen the research platform in the following ways:
1. **Exit Survey:** i. Continue with the Exit Survey, but conduct more frequently (every three years); ii. Shift the delivery of the exit survey from paper to a digital format; iii. Add variables related to visitor satisfaction.
2. **Economic Impact Model:** Continue with the annual model.
3. **Tourism Indicators:** i. Continue monthly, strengthen the indicators and vet variables with the proposed Tourism Research Advisory Group; ii. Include: RevPar and ADR, attraction attendance, selected Google analytics and social media metrics; iii. Consider changing the name to "Tourism Dashboard" or "Tourism Barometer"; iv. Presentation of the tourism indicators should be more interactive.
4. **Other:** Continue with annual CTR volume and value study.

5. **Additional proposed changes**: i. Reduce or eliminate conversion studies: ii. Eliminate the Travel Intentions study; iii. Continue Festivals and Events research but view as contract research and rotate surveys to every three years; iv. Incorporate forward-looking trends research; v. Reduce or eliminate investigative reports such as external market reports by utilizing reports developed by third-parties.

● **Additional Recommendations**

1. **CTR:** Continue its operations at TIAPEI, but the operation needs to be downsized and staff need to work more closely with the Department and be accountable for timeliness of research delivery.
2. **Industry Outreach/Delivery**: Initiate a monthly newsletter featuring current data, trends, and new statistics.
3. **Interpretation:** devote Department resources to interpreting results and implications for users.
4. **Centralized Data Repository**: A keyword searchable repository, all centralized in one location, should be developed. The Department of Economic Development and Tourism is proposed as the one-stop location for this information.

An integrated model is proposed involving a Tourism Research Advisory Group, the Department and the CTR which aims to clarify the purpose, functions and future directions for PEI tourism research.

Conclusion
The recommendations in this report are based on a thorough review of the make-up, content and structure of the current research platform. Improvements are suggested that will provide PEI with a revitalized and more effective research approach to help the province meet the challenges of the coming years and ensure that tourism research secures its stature in helping to make the provincial tourism sector more competitive in a rapidly changing marketplace.

1.   Introduction

Tourism has an important role in Prince Edward Island (PEI), Canada's economy. Consequently, tourism research has played an important role in guiding policy and decisions. Periodically, the research platform[1] and approach are reviewed. That is the role of this document.

The Tourism Industry Association of Prince Edward Island (TIAPEI) and the PEI Department of Economic Development and Tourism (subsequently referred to as *the Department*) embarked on a process to evaluate the current tourism research platform and methods used for the Province.

> **The Need**
> *There is a recognized need to develop a realistic tourism research model that identifies the types of information that need to be collected, analyzed, reported on and disseminated to PEI tourism stakeholders for use in planning and management.*

There is also an expressed desire for performance management/measurement tools to remain current, innovative, leading and that they reflect an effective/efficient use of funds. This document outlines the purpose, objectives, and methods used to evaluate the current PEI tourism research model and provides findings in four key areas and offers recommendations for improvement.

The research model proposed here is designed to align with PEI tourism directions by providing advice and guidance to tourism stakeholders, including research users/purveyors, operators and policy makers.

2.   Purpose and Objectives

The overall purpose of this project was to develop a forward-thinking tourism research model for PEI.

Specific objectives were to:
1. Evaluate the strengths and weaknesses of the Department's: i. current performance management/measurement tools, and ii. overall tourism research platform, with consideration to a delivery model and major tourism data resources

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[1] *A **tourism research platform** refers to the set of data sources and analytical tools used by a destination to monitor its performance in the tourism marketplace.*
Tourism indicators are the variables used by a destination to measure its performance in the market. Each indicator may be a single variable such as numbers of visitor in a specified period or a composite of two or more variables (such as RevPAR). The indicators are an integral tool in any tourism research platform

2. Identify the responsibility of the Department versus third-party or contracted research (for data collection, impact studies, tracking, and conversion studies);

3. Identify relevant: i. performance measurement tools, and ii. research platforms being deployed in selected other North American jurisdictions that may provide insights useful to developing the tourism research model for PEI;

4. Prepare and present a top-line report on key findings from #3 above in comparison to PEI's current research platform;

5. Conduct an industry needs analysis with a focus on the gaps between stakeholder needs and the Unit's performance measurement tools, overall research platform, and how this information should be communicated to industry;

6. Develop three (3) best practice case studies from Canada and the United States;

7. Identify and recruit expert panelists to assess PEI's current performance and measurement tools;

8. Develop top-line reports to highlight results of the industry needs analysis, best practice case studies, and expert panel reviews.

9. Recommend enhancements to the Unit's performance management/measurement tools in a final report consolidating the topline reports noted above.

3. Methods

There were four major inputs to evaluating PEI's current research model and platform:
1. Review of the existing tourism research and platform used by PEI;
2. Stakeholder interviews: with 29 tourism industry stakeholders;
3. Best practices review: of three destinations with leading research practices,
4. Expert reviews: a panel of seven North American experts was selected to review the Top-line reports and provide their perspectives on PEI's approach.

The above approaches are outlined below along with a summary of findings in each area. The consultants then consolidated these results into this report.

4. PEI Research Review Summary

The tasks undertaken for this review were to:
- Evaluate the strengths and weaknesses of the Department's:
  - ➢ Current performance management/measurement tools
  - ➢ Overall tourism research platform with consideration to a delivery model and major tourism data resources
- Identify relevant:
  - ➢ Performance measurement tools
  - ➢ Research platforms being deployed in selected other North American jurisdictions that may provide insights useful to developing the tourism research model for PEI

The consultants collected and reviewed relevant documents and websites including:
➢ Performance measurement tools, associated reports, and sample of survey instruments,
➢ Provincial strategic plans, marketing plans, previous performance, and annual reports,
➢ Relevant Tourism Atlantic and ACTP reports such as performance measurement/management tools,
➢ Initial profiles of the tourism research platforms and programs of ten North American jurisdictions.

An inventory of studies/research consulted in this project is shown in ***Appendix A***. A full review is presented in the report, ***Review of Existing Research, Documentation, and Other Resources***, TIAPEI, August 2015**.** The review covered reports, publications, statistics, and other information produced for or by the Department to assess its tourism marketing efforts, direct future marketing initiatives, and to report on the progress of Prince Edward Island's tourism economy. The focus of the review was on the range and frequency of reports produced, methods associated with these reports, publications, and statistics over the past 10 years rather than a detailed discussion of findings.

A relatively large number of research reports and statistical studies had been generated by/for PEI over the last 10 years, both ongoing and one-off. These resources reflect the importance of tourism to the Province as well as PEI being an island with four access points: (1) the Charlottetown Airport, (2) the Confederation Bridge, (3) the ferry service at Wood Islands, connecting PEI with Nova Scotia, and (4) the Charlottetown Port Authority (cruise visitors), which makes accessing visitors relatively easy for visitors counts and surveys.

In addition, the *Research Review* also detailed 10 destinations that could be considered for best tourism research practices; of these, three were selected for detailed analysis.

In summary, the *Research Review* identified several strengths and weaknesses of PEI's current research platform and performance measurement tools that should inform a new research model and platform going forward:

4.1   Strengths and Weaknesses PEI's Current Tourism Research Platform

The *Research Review* revealed the following overall strengths and weaknesses shown in ***Table 1***.

Table 1: Research Review -- Strengths and Weaknesses of PEI's Current Research Platform

Strengths:
➢ The overall research platform is basically sound and includes the Exit Survey (every five years), Monthly Tourism Indicators, annual Economic Impact analysis, and annual volume and value study,
➢ Information on tourism performance includes multiple sources including visitor counts at the four gateways,
➢ Exit Survey: methodology is sound however some frustrations have been voiced about its relative infrequency (every five years) and slow release time.
➢ A variety of empirical visitor surveys and subjective research exists in the form of panels representing both visitors and residents.
➢ Tourism Indicators: consist of several variables in standard use by destinations across North America.
➢ Internal Marketing Dashboard: is a well-designed and useful internal tool for the Marketing Division but selected elements should be made publicly available as part of the tourism indicators.

Weaknesses:
➢ **Level of Analysis and Interpretation:** The level of analysis and interpretation for government and operators is limited. This situation is due to several factors including a limited research budget and the presence of only one senior analyst. Limited human resources translate to a bottleneck restricting the flow of research and information. The Province is, in effect, data-rich and analysis-poor.
➢ **Timeliness of Data**: There is a bottleneck in releasing key information, especially from the Exit Survey. Delays in 2014 resulted largely due to the demand on the CTR for Festival and Event research. Because of this, meeting requests for customized data or explanation was much delayed, resulting in frustration with the pace of information release.
➢ **Visitor Satisfaction:** There is insufficient information on how well the Province met the expectations and needs of its visitors.

5.   PEI Stakeholder Interview Summary

The purpose of the interviews was to assess the degree to which current PEI research and information are being used, its usefulness, and stakeholder delivery preferences. Consultations with 29 stakeholders took two forms: 1. Personal face-to-face and telephone interviews, and 2. An online survey. A list of those consulted is provided in ***Appendix B***. Complete findings were consolidated and can be found in the full report: ***Stakeholder Interview Summary: Top-line Report*** (TIAPEI, August, 2015). A summary is presented in ***Table 2***.

An interview guide was developed in consultation with the Steering Committee for interviews with several stakeholder groups, represented by 29 individuals. The questions focused on:
➢ The perceived usefulness of current performance indicators;

➢ How existing tourism research, especially performance measurement data, are used
➢ Information sources used in the Department's and Unit's decision-making
➢ Limitations in current research sources that constrain decision-making and planning, including reliability and validity of data sources
➢ Gaps/needs in information for tourism stakeholders

A complete list of questions is found in the *Top-line Report* noted above. The results of these interviews were summarized and analyzed with a focus on strengths, weaknesses, and needs associated with PEI's current tourism research platform.

Table 2: Summary of PEI Stakeholder Interview Findings

1. **Use of Research/Statistics**: 1/3 indicate that use depends on specific needs; 1/3 say they use monthly. Reasons for non-use cited are: 1. Information is too detailed, technical, tables with no analysis, and 2. Unaware of and/or don't know how to request; reports unavailable unless requested.
2. **Frequency of Research/Information Use:** most frequently used types of information and number citing are: 1. PEI Monthly Tourism Indicators (19), 2. Exit Survey results (when available (18), 3. Accommodation Occupancy (15), 4. Operator Google analytics (15),
   5. Meetings and Conventions data (10), and 6. Tourism Forecasts (9).
3. **Usefulness of Research:** The most useful research/information in respondents' views are:
   1. The Exit Survey (16), 2. Accommodation Occupancy (13), 3. PEI Monthly Tourism Indicators, and 4. the operator's own Google analytics (10).
4. **Typical Research Information Sources Used:** 1. PEI Dept. of Economic Development & Tourism (20), 2. TIAPEI (18), 3. Internet searches/own research (16), 4. Centre for Tourism Research (15), 5. Industry groups/associations (12), 6. ACOA (11).
5. **Top Types of Information and Sources:** The top types of information are cited in #2 and #3 above. Top sources are: 1. The Province (for Monthly Tourism Indicators, Accommodation Information (part of Indicators) and Google analytics); 2. The CTR (Exit Survey, Meetings and Conventions data, Festivals & Events research. Respondents generally do not care where the data comes from as long as it is credible and timely.
6. **Major Uses of Research:** 1. Strategic planning, 2. Marketing, 3. Product Development,
   4. Compare how I am doing with others, and 5. Other, such as hiring/staffing, operational improvements, seek/help investors, policy, briefing notes and presentations.
7. **Timing:** Tourism Indicators are preferred *monthly* with Exit survey and Economic Impact/Forecast data preferred *annually*. Respondents want to know what to expect when.
8. **Centre for Tourism Research:** 21 respondents have used the CTR research at one point or another, predominantly for the Exit Survey and past Regional Market Profiles; for those who have not, lack of awareness is the main reason. **CTR Role:** The majority of stakeholders (16) see a role for CTR in collecting, coordinating, analyzing and disseminating research/ information. Many (11) are not sure either because they are unaware of the Centre and offerings, are not informed about it and/or need role clarification.
9. **Stakeholder Research Needs:** Respondents would like to see more information on: 1. Trends (11), 2. Market trends and market place gaps (8), 3. Market reports, regional profiles (8), 4. Forecasting (7), and 8. Spending (7). Several suggestions were made to augment current data produced for the public.

5.1   Strengths, Issues, Weaknesses Identified by Stakeholders

Strengths
  ➢ Stakeholders are supportive of the research and data collection efforts of the Province, and recognize that credible research is needed to make sound strategic decisions.
  ➢ There is a diversity of data sources and research tools capable of meeting the variety of research needs of stakeholders.

Issues, Weaknesses
  1. **Lack of Information Awareness:** many stakeholders are not aware of what is available.
  2. **Information Access:** stakeholders do not know where to go to get the data; the Province is the first point for searching.
  3. **Timeliness**: people do not know when to expect information – there is no published schedule.
  4. **Research Source -- The Question of Who**? Most stakeholders have no preference regarding who provides the information; they want the information to be credible, useful, and timely.
  5. **Centre for Tourism Research**: most see a role for the CTR but it must be clarified. The first priority identified in the proposed strategy is to promote CTR as a leader in tourism research. A stronger role for the Centre, based on discussions by stakeholders – including the research behind this report - is needed to ensure CTR becomes relevant and useful. The CTR lacks sufficient resources to meet the demands or expectations placed on it by stakeholders in a timely fashion.
  6. **Trends**: stakeholders strongly articulate the need for trends and comparative information across regions and provinces.
  7. **Festivals & Events Research and the CTR**: In 2014, a high survey response burden was placed on festival-goers and a heavy load on the CTR for analysis and reporting.
  8. **Mistrust:** There is some perceived mistrust across agencies regarding the research function; this must be overcome through more effective communication among (the Department, ACOA, TIAPEI).

5.2   Implications of Stakeholder Findings

● **Use of Tourism Research by Stakeholders**
  ➢ Tourism research reports and statistics are valued by stakeholders; however assistance is needed to interpret results and develop tourism implications for PEI.
  ➢ Data to support strategic planning is the highest-cited need; product development is also important. Data to support marketing rounds out the top three data needs.
  ➢ Context is desired for much of the data – how the operator compares with others as well as trends in performance.

- **Information Needs/Usefulness of Research**
  - ➢ In addition to the Monthly Indicators, stakeholders use Exit Survey results and accommodation occupancy data fairly frequently. These data are viewed as important for making and updating operational and strategies, especially for marketing decisions.
  - ➢ The Exit Survey is viewed as a great potential source of information, but it is not analyzed as fully as might be.
  - ➢ RevPAR and ADR are widely desired, especially by accommodation stakeholders.
  - ➢ There is a need for information on trends, what is going on in the industry, market and product/experience trends, as well as demands by travelers for accommodations and food, and for understanding what the visitor is seeking from his or her visit to PEI.
  - ➢ Comparisons with other jurisdictions – both Provincial and Regional – would make results more meaningful for many users.

- **Frequency of Information/Research Use**
  - ➢ It often difficult to access desired or needed information because potential users do not always know what is available or where to look.
  - ➢ There is frustration with working with CTR in terms of the timeliness of data release, the ability to request specific types of reports, and the lag time in having information requests fulfilled.
  - ➢ The timely release of information, including routine reports, is essential for useable results; delivery needs to be improved.
  - ➢ Different information is needed at different times, and users would like to be able to count on having information on a timely basis that matches their needs for data – whether it is monthly, quarterly, or annually.

- **Usual Sources of Information**
  - ➢ The CTR is seen by some users as not currently being very helpful in terms of answering questions or interpreting results.
  - ➢ There were some complaints about the slow release of reports and statistic now (compared to the past).
  - ➢ More insightful information on visitor motivations would be welcome by many users.
  - ➢ More timely information and/or assistance identifying sources of data are required.

- **CTR – Stakeholder Use and Suggested Role**
  - ➢ Those familiar with the CTR see it as a valuable and credible source of data, but it needs to do more outreach to inform industry about what is available.
  - ➢ Stakeholders use a variety of information sources from the CTR, depending on their individual situation or responsibilities; no single set of data will meet all stakeholder needs.
  - ➢ There is a strong demand for regional profiles.
  - ➢ Outreach is needed to familiarize industry with what reporting is available. TIAPEI is seen as a logical way to disseminate reports and information about the availability of data.
  - ➢ There is a strong and unmet need for interpretation and analysis beyond simply providing tables.

> ➢ A few questioned whether CTR reports were truly independent and arm's-length from government.
> ➢ The CTR does not appear to have the staff or resources to meet current demands for data, much less additional or new demands.

6.   Best Tourism Research Practices Summary

The purpose of the best tourism research practices was to review three destinations, their research platforms, approaches, delivery, and to identify lessons or insights that can help shape the PEI research platform. These lessons were used to help make recommendations to Tourism PEI and TIAPEI for a revised research strategy.

The three destinations profiled were selected from an initial 10^2: 1 British Columbia, 2. Montana, and 3. Minnesota. These three destinations are profiled in depth in the report, *3 Destinations – Best Tourism Research Practices Top-Line Report* (TIAPEI, August, 2015).

The criteria examined for each of the destinations included (among others):
   i.   research tools and methods
   ii.   visitation and expenditure models
   iii. economic impact models
   iv.   forecasting
   v.   key performance indicators
   vi.   advertising conversion models
   vii. social media metrics
   viii. marketing campaign performance indicators
   ix.   product development research
   ix.   research on key tourism experiences such as VFR, sports, conferences, festivals and/or event research
   x.   research communication models.

6.1 Summary of Lessons Learned: What Practices Might PEI Emulate?

The lessons learned from each of the three destinations are found in the report noted above, *Three Destinations – Best Tourism Research Practices Top-Line Report*, TIAPEI, August 2015. The best tourism research practices from each destination are highlighted below and a comparative chart for each destination as well as PEI is shown in *Appendix E*.

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[2] The 10 destinations initially reviewed are presented in a companion document, *Review of Existing Research, Documentation, and Other Resources.*

The best tourism research practices are highlighted in *Table 3*.

Table 3: Best Tourism Research Practices – A Summary

> ➢ **Research Agenda and Priorities**: annually review research agenda and priorities (Montana, BC)
>
> ➢ **Industry Input**: is used to help guide research priorities (Montana, BC).
>
> ➢ **Communication/Outreach:** Provision of access and active communication program (including subscription-based newsletters) for industry (All).
>
> ➢ **Information Access:** Interactive data offers monthly indicators/reports available to users who pick and choose types of reports & dates (All).
>
> ➢ **Social Media Indicators:** select indicators are released as part of key performance indicators (Montana).
>
> ➢ **Clear Role Definitions:** know who is responsible for what and reflecting this on websites (All).
>
> ➢ **Research Handbooks/Survey Kits**: have been developed that are available to researchers, communities (BC, Montana).
>
> ➢ **Glossary of terms** provides stakeholders with clear definitions (BC).
>
> ➢ **Outsourcing:** can be effective (Montana, Minnesota). Internal research works if/when human and financial resources are present (and justify the cost) (BC).
>
> ➢ **Relationships:** should be fostered with local universities to tap into expertise, resources, graduate students, benefiting all organizations (Montana, Minnesota).
>
> ➢ **Co-operation:** There is potential for working with independent research firms to develop specialized tools and data resources as opposed to either having to direct scarce resources from other uses or not collecting and analyze important data for specialized topics such as advertising effectiveness (Montana, Minnesota).
>
> ➢ **Partnerships:** Work with local university to develop outreach for communities, small tourism firms, festivals and events – including sustainable operations and rural development helps leverage scarce resources and extends reach of tourism research (Montana, Minnesota).
>
> ➢ **Statistics:** In Canada, the use of official statistics (provincial and Statistics Canada) to provide credible information for tourism regions and communities (BC).

7. Experts Review Summary

A panel of seven experts from North America reviewed the three documents created for this report:
1. *Review of Existing Research, Documentation, and Other Resources, August 2015.*
2. *Stakeholder Interview Summary: Top-line Report, August 2015.*
3. *Three Destinations – Best Tourism Research Practices Top-Line Report, August, 2015.*

The list of experts is presented in ***Appendix C***. They were provided with several questions to guide the review and ensure consistency across questions answered (see ***Appendix D*** for questions). Responses to key questions are summarized below.

7.1 Is PEI Getting Good Value for Its Tourism Research Dollar?

When posed this question the Experts responded as follows:

➢ ***Yes*** (2): Good value considering the budget challenge is to provide research in a format that is valuable for the research user, be it politicians, marketers, operators. Good value compared to other jurisdictions. PEI has built and maintained a much stronger core data platform than most other jurisdictions. But like others could get even better value.

➢ ***Yes, but***… (4): PEI is getting good data considering their limited budget but could be doing better. Users need to <u>feel</u> they get good value. There needs to be a better focus on the data collection and dissemination that is useful to industry and government. PEI is getting a lot for their money but without interpretation, it is underappreciated. In terms of the number of studies and types of research being conducted, PEI is doing very well. They are less efficient in terms of delivery timing and conveying the meaning of findings to constituents.

➢ ***Unsure*** (1): Hard to assess. They seem to have a lot on their plate with few resources to back it (especially dollars).

7.2 What Should PEI's Tourism Research Platform Look Like?

Experts view the research platform as fundamentally sound, with some differing views.

● **Economic Indicators**: were unanimously seen as needed. There was consensus that these should include overall expenditures, GDP, jobs, and government revenue or taxes.

● **Monthly Tourism Indicators**: Every respondent felt that the Tourism Indicators were fundamental to the platform.

Suggested Inclusions:

➢ Arrivals by the four access modes/points were unanimously seen as important. Most experts expressed envy that PEI had such control over access to the island and, thus, good data.

➢ Half noted the need for RevPAR and ADR data to be added to the accommodation portion of the Indicators.

➢ There were varied views on park and historic site attendance, golf course rounds, and number of visitors counselled at information centres.

➢ One reviewer suggested monthly indicators be collected and reported across all four Atlantic Canada provinces.

➢ Other suggestions included: currency exchange rates, weather information and social impacts.

Presentation:

➢ Several noted that the data should be presented as a more interactive dashboard, not the static tables currently used. The format should include previous year's data to permit easy trend analysis (2).

● **Exit Survey**: The exit survey was seen as essential, with the need for results to be provided on a timely basis.

Other Studies/ Information

➢ **Travel Intentions Data**: One expert questioned the value of travel intentions data. He felt that substantial effort was spent collecting this but that the information did not usually lead to any actionable decisions by operators or the province.

➢ **Conversion Studies/Data:** was challenged by several experts who view it as not credible because so many controllable (or even unmeasurable) variables shape the conversion from awareness or advertising to travel behaviour. In their jurisdictions, politicians and policy-analysts generally dismiss conversion studies as unreliable. If businesses want that information, they should pay for it themselves and not rely on the province to so.

➢ **Visitor Satisfaction and Experience Preferences** were data needs expressed by two reviewers and some stakeholders.   They noted that the province, at this time, is unable to know whether the product offerings are improving, holding stable, or declining in the face of competition from other destination regions. Another noted the need for more detailed profiles by region and by market segment (type of traveller, *e.g.,* family).

➢ **Secondary Research:** A couple of respondents suggested that market reports already being produced by other sources and that CTR or the Department are available and the province could buy or otherwise gain access to these – thus obviating the need for original investigative research on macro market or product trends. However, investigative research into the potential for (and type of) packages would be useful for island operators to increase their competitiveness in the market.

7.3   PEI Tourism Research Strengths and Weaknesses

A summary of Expert views of PEI tourism research strengths and weaknesses is shown in
Table 4.

Table 4: Expert Views -- PEI Tourism Research Strengths and Weaknesses

Strengths:
- ➢ Experts view the Research Platform as fundamentally strong.
- ➢ Experts feel PEI's data resources were strong (with the possible exception of conversion studies).
- ➢ PEI's geography was recognized by all experts as a distinct advantage for data gathering.
- ➢ Exit Survey: Strong but more progress could be possible if the exist surveys were converted to a digital or electronic format for analysis and dissemination.

Weaknesses:
- ➢ **Research Agenda**: needs articulation. Most experts noted that research needs for the province should be determined by industry.
- ➢ **Not enough emphasis on interpretation.** Variations on the phrase, "*data-rich and analysis-poor*" were made by four experts.
- ➢ **Industry Outreach:** Over and above the research platform, all experts commented on the need for industry outreach. One reviewer urged a more personal approach to supplement on-line and newsletters because of the small size of the province. Industry needs to know what information is available and <u>when</u>.
- ➢ **Timely Release**: The problem of the timely release of was recognized as limited the utility of all these data. Timing was noted as important, especially for small businesses.
- ➢ **Limited HR Capacity**: The majority (four reviewers) noted that having one senior analyst was insufficient and that a team was needed to produce and disseminate data.
- ➢ **Multiple Locations for Data**: Further, several experts noted that data seems to be archived in several different location, making it difficult to know (1) what is available, and (2) where to find it and then access it.
- ➢ **Roles and Relationships**: The relationships among the Department, the industry association, and CTR are confusing. Roles and relationships should be defined/clarified as part of any revamping of the research platform.

7.4   Gaps in Meeting Stakeholders' Needs

- ● **Raise Awareness of Data Existence and Availability:** Some experts recommended that the province should concentrate on (1) raising awareness of what is available, (2) how to access it, and (3) what use could be made of the data.

- ● **Common Situation:** Stakeholder comments about rate of usage, awareness, and technical nature of the reports are common in the tourism research sector. "*Each of us struggles with the balance between providing data in a timely fashion and the utility that information has as it moves down through the industry's hierarchy. Given the*

present structure of PEI's research unit, this situation is not likely to be rectified soon. A research team (not an individual) is needed if data are to be collected, analyzed, synthesized, and communicated in an efficient fashion."

- **Additional Data:** Several other specific needs were identified by experts, including:
  - ➤ **Brand Reputation:** The lack of knowledge of brand awareness and changes in PEI's brand reputation was seen as a risk. The province once had a favourable reputation but is in danger of losing market share as other domestic destinations upgrade products and service quality.
  - ➤ **Visitor Satisfaction Research**: There is a need to conduct satisfaction research among visitors –over time – to determine whether the province is improving, static, or declining in terms of service quality, especially in comparison to competing provinces.

- **Exit Survey – Market Profiles**: The experts recognized the need to further analyze the exit survey to develop more detailed market profiles (who they are, what they are doing, segments represented – activities, demographics, motivations - where they come from, satisfaction levels, *etc*). These profiles should be developed for the various regions of the province and tracked over time.

- **Competitive Intelligence**: More generally, competitive intelligence about trends in consumer demands and tastes is needed, especially in the context of the performance of competing provinces. Forecasting of demand is also seen as lacking, especially in short- to medium-term.

- **Research Direction Needed:** The industry needs a clear sense of the direction and mission of the research function in concert with government and industry under the direction of an advisory board. This person needs to be a dynamic, extroverted speaker because he or she will become the face and voice of the industry. The overall direction and priorities of the director should be shaped by an industry advisory board and reflect government priorities. The advisory council should be reconvened as soon as feasible and meet in a one or two-day retreat to map out priories.

- **University Relationship:** Three of the experts expressed surprise that the relationship with UPEI has been terminated. They found it difficult to understand why the province's public university would not be interested in working with this strategic sector in the Province. The advantages of having a university relationship are several, as it: 1. is seen as neutral and arm's-length from government and industry, 2. provides access to specialized technical research skills, especially data management and analysis, 3. develops an institutional memory and pool of talent that will be valuable for the sector for years to come; and, 4. Prepares future leaders for the tourism sector.   The alternative of hiring individuals with research skills for specific, one-off tasks will meet immediate needs but this does not build up the pool of abilities and people that will be of benefit to the sector in years to come.

7.5   Best Practices That PEI Could Emulate and What Might PEI Borrow

1. **Improved Communication/Industry Outreach/Information Access:** Hands-down, experts stated that better industry outreach/communication and providing access to research/information is required on PEI.   Several suggestions were made on ways to do this, including: interpretation of implications of research results for industry (a summary addressing "so what?"), communicating research availability on the web (online access), a subscription newsletter focusing on new research, better assessing industry needs (perhaps through the RTAs), presentations to industry, press releases, dashboard, providing consultant access to past data sets.

2. **Research Agenda**: Three experts noted the need for a clear, annual research agenda driven by an articulated provincial tourism strategy. Making annual decisions on research is important as it allows stakeholders to agree on projects that are feasible in a one-year time-frame and provides associated timelines. An associated delivery schedule is also important.

3. **Interpretation of Research Results**: was cited by several experts with the need to develop implications for industry and the province.

4. **Building Internal Capacity:** Both within the Department and CTR, three experts noted the need to build organizational to allow for flexibility, faster responses, and better incorporate the in-depth knowledge of both organizations into revisions and strengthening the research approach.

5. **Social Media Measurement/Google Analytics:** Three experts noted the need to integrate social media measurement into current Tourism Indicators.

6. **Centralized Access to and Communication of Research**: was suggested by two experts to retain continuity of information for decision-making.

7. **Exit Survey:** Digitizing the collection of the Exit Survey was noted by two experts and would allow collecting, analysis and interpretation of the data to be streamlined.

8. **Role Clarification:** Two experts stressed that it is important to clearly identify roles of providers so that users know where to go for the information.

9. **Contracted Research/User Pay/Cooperative Research**: Two experts suggested user-pay/contracted research where fees are set for custom analysis (allowing for possible design by CTR and hiring of student interns) or licensing data to a private sector analyst for a one-time specific use; partnering with various groups on a shared-cost basis to conduct some research.

10. **University Relationship:** the need to work with a local university with research capability was cited by three experts, notably the ones with university linkages.

7.6   What Is PEI Doing Well and Should Continue Doing?

➢ Collecting a wide variety of data with limited resources (4).
➢ Very good underlying research platform (the exit survey, tourism indicators and accommodations information, annual economic impact) provides a strong, consistent and growing database. These appear to be well-received and useful. (3)
➢ Understanding the importance of data in making informed tourism management decisions.

7.7   Improvements PEI Can Make to Strengthen its Research Approach

➢ **Research Agenda/Goals and Objectives**: Review annual research agenda with stakeholders; developing objectives with stakeholders, including research priorities, timing of research and release dates. (3)

➢ **Trends and Forecasting:** Where is the sector and tourist demand going? Industry wants to know in order to plan product development and anticipate changes in the market (2).

➢ **Interpretation:** and providing help interpreting and using the research; consider diverting research funds to interpretation to make it more useful to industry and others. (2)

➢ **Marketing and Dissemination of Current Work**: Enhance access (devote funds to this purpose). Information is not user-friendly and lacks interactivity or the ability to drill down into the data via an online dashboard. (2)

➢ **Research Components**: Reconsider the need for: 1. the travel intentions survey, 2. Resident survey, and 3. Conversion studies.

➢ **Festivals and Events:** Ask if all the Festivals and Events studies are needed and the purpose of these studies – is this the best way to be accountable?

➢ **Exit Survey:** Timeliness of the release of results needs to be improved. Could an interactive data software program be designed for the PEI Exit Survey, then conduct it on a more frequent basis? This would improve release time.

7.8 Suggested Enhancements to PEI's Tourism Research Platform and Performance Management/Measurement Tools

● **Tourism Strategy:** There is need for an overall Provincial tourism strategy to help guide the research – an issue that is outside the scope of this report. One expert put it well (see boxed quote).

● **Current Research:**

i. Ask if the following are needed and used:
1. Monthly Travel Intentions – are they needed monthly or seasonally? 2. Would a summary of findings make some of the reports more useful?

ii. Objectives: devote effort to why research is being done. Is it to design new products, to support policy and/or marketing decisions, to support a higher level tourism strategy, or some other purpose?

iii. Consider doing less in order to get more value out of the core tools; ensure core tools are continually strengthened, particularly through improved timeliness and better interpretation.

> As one Expert put it:
> *"The PEI research platform is impressive, albeit subject to the pressures to be all things to all stakeholders that beset most tourism organizations or ministries.*
> *A research strategy should flow from and support an overall tourism strategy.*
> *Without an overall tourism strategy (that makes choice and sets priorities), it will be hard to rationalize a research strategy and a research plan. It is hard to decide which possible components of a research platform to prioritize without knowing what the overall strategy is to grow the tourism industry."*

● **Communicating Available Research/Industry Access:**
  i. Keeping industry informed on what research resources (statistics, reports) are available;
  ii. How to best package and deliver research insights for intended users;
  iii. Making research easily accessible in a centralized repository;
  iv. Mining data and providing reports based on user needs;
  v. User-friendly website;
  vii. Developing a communications plan.

● **Exit Survey:** Streamline and digitize; develop an intercept schedule and increase frequency. Needs to go online to ease the flexibility, collection and dissemination of information. (2)

● **Tourism Indicators:**
  i. Expand reports to include ADR and RevPar (2).
  ii. Add comparative data (key indicators) from other similar destinations (Atlantic Canada) – to make data more valuable to users and provide a proxy for marketing success. (2)
  iii. Add environmental and social indicators.

● **On-line Dashboard** (similar to tourism indicators): with flexibility, currency and value (Montana example). Develop a simple dashboard (a rolling dashboard of key indicators) that is easy to update and understand. (2)

- **University Linkages**: Establish/enhance University partnerships to increase capacity (3).

- **Interpretation**: Provide "so what" with all distributed reports. If there is no "so what", perhaps the information is not required. (2)

- **Visitor expectations and Satisfaction Levels**: incorporate into visitor studies.

- **Tourism Advisory Group:** should help guide the research agenda.

8.   Proposed PEI Research Model - Recommendations

These recommendations concern the foundation on which the new platform will be operated.

8.1 Strategy-Related Recommendations

1. **Position the Department (Province)** as the lead tourism research organization for the Province and carry out the direction provided by the Tourism Research Advisory Group noted in Recommendation #2. The Province will lead and manage the CTR's work.

2. **Create a Tourism Research Advisory Group**: made up of the Department of Economic Development and Tourism, TIAPEI, ACOA and a UPEI Research Expert. The role of this committee would be to develop research priorities with an annual agenda detailing release dates. It should also provide advice about of the priority to be given to new research on desired tourism experiences as well as trends and forecasting. Historical data are important, but the industry needs and wants forward-looking research.

3. **Integrated Tourism Research Delivery Model**: Adopt an Integrated Research Delivery Model as shown in *Figure 1*.

4. **Research Agenda:** Develop a clear, annual research agenda, vetted by industry. Provide guidance to the degree to which data interpretation should be developed for projects.

5. **Strengthen Research Capacity:** Seek to develop and build research capacity both within the Department and CTR on an ongoing basis. Cross-train Department staff and hire a student intern at the CTR to assist with data cleaning, analysis and possibly interpretation, depending on skill sets. This includes building capacity so that CTR staff or contract employees might be hired to do custom research on a cost-plus basis.

6. **University Linkages:** Tourism PEI needs to reach out for expertise, input and student interns. There is need re-engage the University and establish new linkages and rebuild tourism research capacity on the Island with a view to the betterment of PEI, in one of its key industries. This will also help strengthen research capacity – a critical need for the Province.

8.2   The Research Platform

The platform consists of a number of elements as noted below; recommendations for each are noted.

1. **Exit Survey:**
   i.   Continue with the Exit Survey but conduct more frequently (every three years) to keep pace with a changing market place. It is the envy of many non-Island destinations.
   ii. Shift the delivery of the exit survey from paper to a digital format.
   iii. Add variables related to visitor satisfaction. For example, there is little information to indicate whether PEI is improving its tourism product, falling backwards, or simply maintaining the status quo. Satisfaction questions should cover both the overall visit as well as specific aspects of the visitors' experiences such as value, activities, accommodation, and food services

2. **Economic impact model:**
   i.   Continue with the annual economic model. It is well-established and is based on accepted modelling practices.

3. **Tourism Indicators:**
   i.   Continue and strengthen the Tourism Indicators.   Vet the variables included with the proposed Tourism Research Advisory Group (shown in Figure 1).
   ii. Use Data resources currently included in the Indicators addition to:
      ➢ RevPar and ADR
      ➢ Attraction attendance figures
      ➢ Selected Google Analytics and other social media data
   iii. **Name**: Change the name of the Tourism Indicators to "*Tourism Dashboard*" or "*Tourism Barometer*" to make it more appealing to users.
   iv. **Presentation:** Refine and expand the current format so that it is in a more interactive format, allowing users to explore data in more detail and to create their own tables or analyses. For example the table on access by device for the current month could be redesigned to allow the user to search the results for other months.

4. **CTR volume and Value study:**
   Continue this work. This basic information is used by government and industry.

5. Additional proposed changes to the research platform include the following:

i.   **Reduce or eliminate conversion studies:** Consider eliminating conversion studies from the research roster. Instead, partner with ACOA-Tourism Atlantic to assess whether a couple of key questions could be included in ACTP conversion work.

ii. **Eliminate the travel intentions study**: As several experts noted, the value of this study in terms of making actionable decisions is questionable.

iii. **Continue Festival and Events Research**: Manage as contract research and rotate the surveys so that any given festival or event is studied once every three years.

iv. **Incorporate Forward-Looking Trends Research**: Manage as contract research and conduct as funds permit. This is represents an articulated Industry need.

v.   **Investigative Reports**: Reduce or eliminate investigative research such as external market reports. These are available from other sourced, and are not a good use of scarce CTR resources. More generally, recognize that CTR has limited resources and cannot conduct all desired research. More co-op research with industry partners would help leverage scarce resources and generate research outputs with a narrow market or readership.

8.3 Additional Recommendations

1. **CTR:** CTR should continue its operations at TIAPEI, but its research staff should be more accountable and have closer communication and research ties to staff in the Department. The CTR role must be well defined so it can be integrated within and managed as part of the Provincial tourism research platform. There is need to downsize the CTR (one senior researcher and one intern) and limit and bring focus to CTR activities so that timely work is produced. The primary focus should be on the Exit Survey and Regional Reports, with a secondary focus on supplementary reports for the next year (2015-2016), then increase the workload/mandate based on demonstrated capacity/capabilities. The CTR will be responsible for research design and methodology and, where necessary research implementation.

2. **Industry Outreach/Delivery**: Initiate a monthly newsletter featuring current data, trends, and new statistics. A free, sign-up, electronic monthly newsletter will help raise the profile of tourism research and the CTR and demonstrate is utility to the industry. The newsletter's distribution should be not only to individual businesses, but RTAs, industry associations, and the general media.

3. **Interpretation:** Devote internal Department resources to interpreting research results and their implications for users.
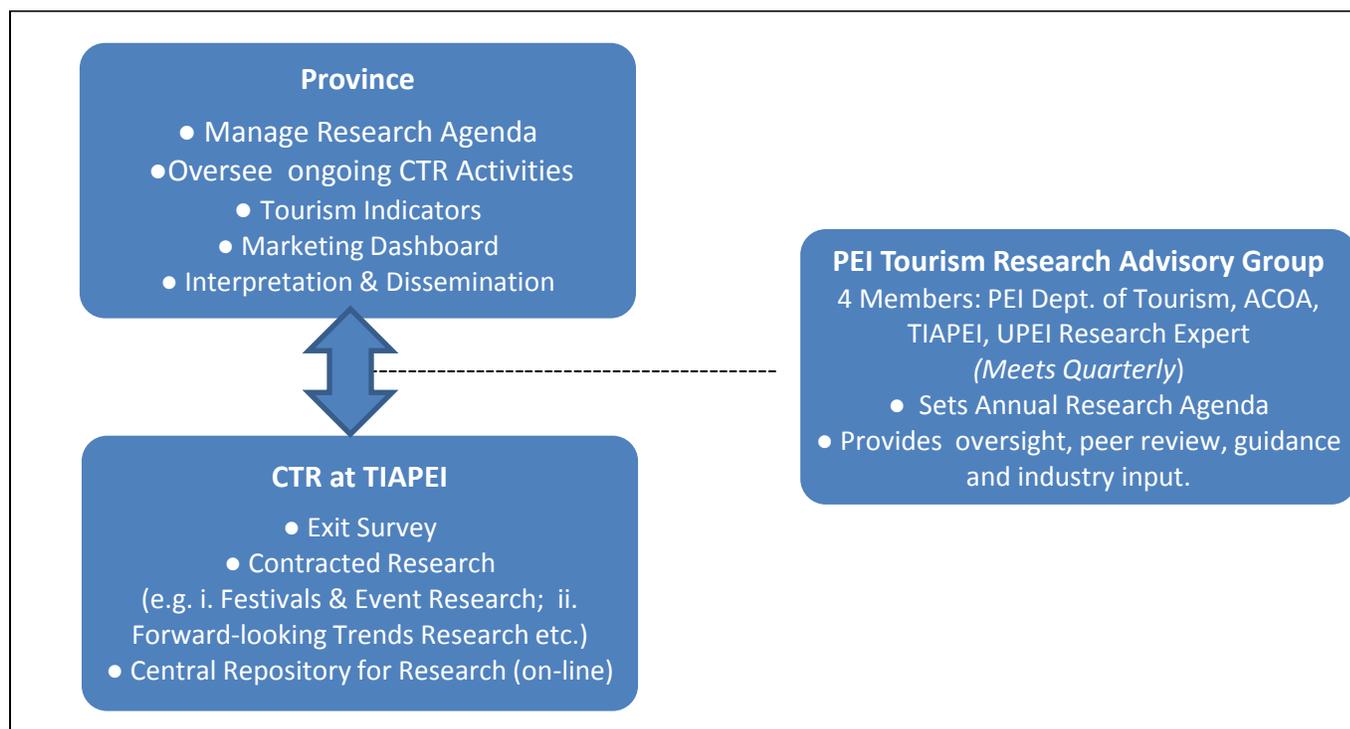
4. **Centralized Data Repository**: A keyword searchable repository, all centralized in one location, should be developed. The Department of Economic Development and Tourism is proposed as the location for this information. Ensure that the list of CTR publications of April 2015 is publicly available in the repository.

8.4   Proposed Research Delivery Model

An organizational model is proposed that aims to clarify the purpose, functions and future directions for PEI tourism research (see *Figure 1*).

Suggested tourism research roles for each entity in the model are presented below.

Figure 1: Proposed PEI Research Integrated Delivery Model

Province
- Manage Research Agenda
- Oversee ongoing CTR Activities
- Tourism Indicators
- Marketing Dashboard
- Interpretation & Dissemination

PEI Tourism Research Advisory Group
4 Members: PEI Dept. of Tourism, ACOA, TIAPEI, UPEI Research Expert
(Meets Quarterly)
- Sets Annual Research Agenda
- Provides oversight, peer review, guidance and industry input.

CTR at TIAPEI
- Exit Survey
- Contracted Research
(e.g. i. Festivals & Event Research; ii. Forward-looking Trends Research etc.)
- Central Repository for Research (on-line)

- **Role of Tourism Research Advisory Group**
  - ➢ Establishes priority needs and sets annual research agenda (F&E rotation schedule, special projects)
  - ➢ Identifies goals of research as connected to Provincial tourism strategy
  - ➢ Oversees CTR and sets priorities (staffing, budgeting, requests, external (project) research)

● **Role of Province**
> Coordinate Functions/ projects across CTR and Province to ensure needs are articulated and fulfilled
> Work with CTR and TIAPEI to ensure research needs are fulfilled.
> Work with CTR to "translate" research into industry-digestible/palatable/useful reports and strengthen roles of outreach, working with end users and managing work flow.
> Implementing annual research agenda and recommendations of the Advisory Group, especially budgets and work plans.
> Centralized Information Repository: Become the central source of research. Create/ devise section on website for completed research reports – easily accessible. Begin with the inventory of CTR reports developed in April 2015.
> Conduct comparative secondary research across AC for inclusion in Indicators.
> Explore potential partnerships for tourism research.

● **CTR Role**
> Design, Refine, Implement Exit Survey (every 3 years); Target digital collection format/methodology for 2017.
> Research design, methodology and research execution (including data collection and analysis) where required.
> Mine Exit Survey for Regional and Activity Profiles.
> Assist with special projects identified by Advisory Committee: design, data collection, analysis and reporting.
> Work with Province to ensure research results are made available in a timely manner
> Contract Research: Help design and analyze contract research; this includes F&E research – rotated every three years; forward-looking trends research, other specialized research.
> Sign-up e-mail for dissemination of information.

9.   Conclusion

This report presents a Tourism Research Model for PEI. The final Model is based on a review of current best practices for developing a research infrastructure and performance metrics to support industry planning, decision-making, evaluation, and forecasting.

The PEI tourism research budget is slim and PEI is currently receiving good value for its research dollar. However, there are a number of improvements to be made that will make the research platform and its delivery stronger.

The proposed model reflects an assessment of user needs in the tourism sector and draws upon best tourism research practices from three case studies. The model has also had input from an expert panel of seven experts, drawn from industry, government, and academic settings.

Finally, the report specifies the roles of the Department, TIAPEI, and CTR.

Appendix A: PEI Tourism Data and Report Inventory

Data Type	Details
Traffic	
Bridge Data	• Total Monthly Number of Vehicles Leaving PEI at Confederation Bridge • Total Monthly Number of Vehicles Leaving PEI at Confederation Bridge by Origin (Total, NS, NB, NL, ON, QC, Other Canadian Provinces., New England, Other USA States) • Total Daily Number of Vehicles Leaving PEI at Confederation Bridge at manned and unmanned lanes
Airport Data	• Total Monthly Deplanements and Enplanements at Charlottetown Airport
Ferry Data	• Total Monthly Number of Vehicles Leaving PEI Via the Wood Island Ferry • Total Monthly Ferry Crossings • Total Monthly Ferry Crossings Cancellations • Total Monthly Number of Passengers Leaving PEI via Wood Island Ferry
Cruise Ships Data	• Total Number of Passengers on Cruise Ships at the Charlottetown Harbour for each Cruise Ship • Total Number of Crew on Cruise Ships at the Charlottetown Harbour for each Cruise Ship • Total Monthly Number of Cruise Ships at the Charlottetown Harbour
Motor Coach Data	• Total Monthly RNS to Motor Coach Passengers
Inquiries/Interest	
Travel Intentions	• 2012-2013 Travel Intentions Survey
Conversion Study	• 2013 Conversion Study and Visitor Profile
Website Stats	• Total Monthly Number of Visits to Tourism PEI website (English) • Total Monthly Number of Visits to Tourism PEI website (French) • Total Monthly Number of Visits to Tourism PEI website (All) • Total Monthly Number of Visits Via Mobile Devices to Tourism PEI website
Call Centre Data	• Total Monthly Number of Calls (during business hrs.) at Tourism PEI Call Centre (English) • Total Monthly Number of Calls (during business hrs.) at Tourism PEI Call Centre (French) • Call Details at Tourism PEI Call Centre
Publication Fulfillment Data	• Total Monthly Number of Tourism Kits Mailed Out (English) • Total Monthly Number of Tourism Kits Mailed Out (French)
Publication Online	• Total Monthly Number of Viewings of Tourism PEI Online Publications (individually) • Total Monthly Number of Requests for Visitors Guide on TourismPEI.com • Total Number of Downloads of Visitors Guide on TourismPEI.com (Monthly and YTD)
VICs and Destination Centres Data	• Total Monthly Number of Number of Parties Counselled at Each VIC and Destination Centre (as well as all combined) on PEI
eNewsletter Subscription Data	• Total Monthly Number of New Subscriptions to TourismPEI eNewsletter (Mth / YTD)

Appendix A (cont'd…)

Data Type	Details
Intention Rate Data	• % Rate of Respondent who are Likely / Very Likely to Visit PEI
Accommodation Search Data	• Total Monthly Number of Searches for Accommodations on TourismPEI.com
Activities	
Golf Data	• Total Monthly Number of Non-Member Rounds (Golf PEI members only) • Total Monthly Number of Rounds (Golf PEI members only)
National Park Data	• Total Monthly Number of Person-Visits to PEI National Park • Total Monthly Number of Visitors at Province House • Total Monthly Number of Visitors at Green Gables Site • Total Monthly Number of SNS at Each Parks Canada Campground (2)
Heritage Sites Data	• Total Monthly Number of Visitors at Each Heritage Site and Museum (8)
Meetings and Conventions Data	• Total Monthly Number of Delegates at Meetings and Conventions • Total Monthly Number of Meetings and Conventions
Accommodation Occupancy	
Operators Data	• Total Monthly Number of Operations Opened (disaggregated by Fixed Roof and Campground)
Occupancy Data	• Total Monthly Number of Room-Nights Available (by Region, by Type, Total for the Province) • Total Monthly Number of Room-Nights Sold (by Region, by Type, Total for the Province) • Total Monthly Number of Site-Nights Available (by Region, Total for the Province) • Total Monthly Number of Site-Nights Sold (by Region, Total for the Province) • Total Monthly Number of Overnight Stays (by Origin, Total for the Province) • Monthly Occupancy Rate *Note:* Origin is broken down by: - Canada (all provinces) - US (all States) - International (10 specified countries plus "other" countries)
Social Media	
Facebook Data	• Total Monthly Number of Unique People Talking About This on Tourism PEI Facebook
YouTube Data	• Total Monthly Number of Video Viewings on Tourism PEI YouTube Site
Twitter Data	• Total Monthly Number of Retweets
Pinterest Data	• Avg. Monthly Viewers • Avg. Monthly Engaged • Avg. Daily Impressions • Avg. Daily Viewers
Bookings	
Online Bookings Data	• Total Monthly Number of Bookings on BookPEI • Total Monthly Revenue from Bookings on BookPEI

Cont'd…

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Appendix A (cont'd…)

Data Type	Details
Visitation	
Visitation (All Entry Points)	• Number of Visitors to PEI
Overnight Pleasure Visitors	• Results from 2012 Exit Survey
Expenditures/Economic Impacts	
Expenditures of PEI Visitors	• Total Expenditures of Visitors to PEI (Annual)
2013 Expenditures Estimation and 2014 Expenditures Forecast	• Total Expenditures of Visitors to PEI
Economic Impact of Tourism Expenditures in Prince Edward Island 2012	• Estimates of Tourism GDP, Employment, Government Revenues, and Economic Diversification
Atlantic Canada Tourism Partnership (ACTP)	
Travel intentions	• Web-based, specific to PEI
Conversion rates	• Web-based
Advertising recall/media inquiries	• Web-based
Lifestyle segmentation	• Key international markets
Market profiles	• Key international markets (US, UK, Germany, France, Japan, China)
Destination Canada	• Global Tourism Watch
Regional studies	• Consumer research in New England and Mid-Atlantic States
Other	
CTR Reports and Publications 2015	• Inventory of 31 Reports Based on Exit Surveys and 31 Reports Based on Panel Surveys
2005 Research Strategy	• Strategy for a New (2005) Research Platform
TAC Task Force	• Recommendation Concerning Future of TRC, 2012
Monthly Indicator Reports	• Statistics Related to Occupancy for a Variety of Accommodation Types, Selected Activities (also noted above)
Marketing Dashboard 2015 (Internal)	• Summary of Key Indicators such as Website Traffic, Interest in PEI, and Other Web Statistics
Marketing Dashboard Narrative 2015 (Internal)	• Detailed Monthly Summary of Key Indicators Such as Website Traffic, Interest in PEI, and Other Web-based Statistics
PEI Tourism Research Strategy April 2015 – March 2018	• A vision and operational guidelines for an update tourism research strategy

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Appendix B: List of PEI Tourism Stakeholders Consulted

	Organization/Business	Contact
	FACE-TO-FACE	
1	Tourism PEI (n=5)	Chris Jones
2	Atlantic Canada Opportunities Agency (ACOA) (n=3)	Bernadette Power
3	TIAPEI (Tourism Industry Association of PEI) Board (n=9)	Don Cudmore
4	Centre for Tourism Research (CTR) (n=1)	Kent Hudson
	BY PHONE	
5	Meetings & Conventions PEI	Michael Matthews
6	Hotel Association of PEI	Kevin Murphy
7	MRSB	Wendy Drake
8	Sharp Group	Eric Riordon
9	Cavendish Beach Music Festival	Jeff Squires
10	Centre for Tourism Research	Dongkoo Yun
11	North Cape Coastal Drive (RTA)	Mitchell Rennie
12	Discover Charlottetown	Chris MacDonald
13	Tourism Cavendish Beach	Darcy Butler
14	Versatile Management Group	Tracey Singleton
15	Maritime Fun Group	Matthew Jelley
	BY E-MAIL SURVEY	
16	Golf PEI	Gary Sheehan
17	Inns of Distinction	Vicki Francis
18	Inns of Distinction	Judy MacDonald
19	Inns of Distinction	Jay MacDonald
20	Cavendish Beach Music Festival	Kim Doyle
21	Confederation Bridge	Michel LeChasseur
22	Charlottetown Airport Authority	Doug Newson
23	Charlottetown Harbour Authority	Corryn Morrissey
24	Northumberland Ferries Limited	Jeff Gaudet
25	Island East Tourism Group (RTA)	Patsy Gotell
26	Evangeline Tourism	Alcide Bernard
27	Central Coast Tourism Partnership	Peggy Miles
28	Confederation Centre for the Arts	Jessie Inman
29	Sundance Cottages	Linda Lowther

Appendix C: List of Expert Panel Reviewers

1	**Kathryn Forgacs**	Research Manager, Ontario Tourism Marketing Partnership
2	**Marion Joppe**	Professor, School of Hospitality, Food, and Tourism Management, University of Guelph
3	**Steven Litvin**	School of Business, College of Charleston, Charleston, SC
4	**Norma Nickerson**	Director Montana Institute for Tourism & Recreation Research, University of Montana
5	**Mark Okrant**	Director, Institute for New Hampshire Studies, Plymouth
6	**Richard Porges**	Executive Director, Strategy, Research & Communications, Destination BC
7	**Eugene Tomlinson**	Assistant Professor, School of Tourism and Hospitality Management, Royal Roads University; former Senior Market Analyst, Canadian Tourism Commission

Appendix D: Questions for Experts – PEI Research Model

Overall

1. Based on the research review, the stakeholder interviews and the best practices review, what should PEI's research platform look like? Should it include:
   i. Monthly Tourism Indicators? (which ones?)
   ii. Economic Indicators? (which ones?)
   iii. A visitor exit survey with updates?
   iv. Investigative research, such as market reports? (other?)
   v. Industry outreach (extension activities), such as online reports, access to data, copies of presentations, seminars?
   vi. Industry Outreach? (what might work best?)
   vii. Other? (if so, what?)

Research Review

2. What do you see as the strengths and weaknesses of PEI's:
   i. current tourism performance management/measurement tools, and
   ii. overall tourism research platform, consideration to their delivery model and major tourism data resources.

Interviews with Stakeholders

3. Based on the information in the *Research Review* and *Interview Summary*, what do you see as the major gaps between stakeholder needs and PEI's: i. overall research platform, and ii. research performance measurement tools.

Best Research Practices

4. What practices in the three cases present lessons or applications that PEI should emulate?

5. In addition to the section, *Best Research Practices Observations: What Might PEI Borrow?* on pp. 18-19, what might be 2-3 additional ideas for PEI?

Wrap-Up Questions

6. What is PEI doing well and should continue doing?

7. What are they doing poorly or not doing that should be addressed in any future research strategy?

8. Please recommend 2-3 enhancements to PEI's tourism research platform and performance management/measurement tools

9. Based on your knowledge base, do you think PEI is currently getting good value for its tourism research dollar?

Appendix E: Best Tourism Research Practices -- Summary Comparisons:
PEI, BC, Montana, Minnesota

	Category/Item	PEI	British Columbia	Montana	Minnesota
1	**Population**	145,200	4,631,000	1,005,000	5,457,000
2	**2014 Tourism Visitation**	1.36 million visits	19.0 million visits	10.9 million (non-resident) visits	69.0 million visits
3	**2014 Tourism Expenditures**	$401 million	$13. 9 billion	$3.9 billion (excluding 4% lodging tax)	$12.0 billion
5	**Office Responsible for Tourism**	Dept. of Tourism and Culture	Destination BC	Montana Office of Tourism; have a TAC; Strategic Plan (2013-2017); 6 tourism regions	Explore Minnesota
6	**Estimated Tourism Budget**	$17.9 million	$13. 9 million	$23.2 million (65% for marketing)	$8.5 million
7	**Office(s) Responsible for Tourism Research**	1. Dept. of Economic Development and Tourism; Evaluation & Industry Investment Unit); 2. Centre for Tourism Research (CTR) at TIAPEI	Strategy, Research & Communications, Destination BC	1. Montana Office of Tourism -- dashboard? 2. Institute for Tourism & Recreational Research (ITRR), College of Forestry and Conservation at The University of Montana – Missoula - linked on montanatourismnews.org page;	1. Explore Minnesota (public/private partnership; 2. University of Minnesota Tourism Center
8	**Size of Tourism Research Budget**	$300,000	$1.355 million - includes performance & strategy, salaries; about $500,000 is operational	$581,146 for ITRR; other measures (dashboard) paid for by marketing out of the Office of Tourism	$10,000 for UMN Tourism Research Center (plus special project funding and excluding salaries) $115,000 for research in Explore Minnesota (excluding salaries)

Appendix E (cont'd…)

	Category/Item	PEI	British Columbia	Montana	Minnesota
9	**Role**	Conducts primary research on visitor numbers, spending, origins, and other characteristics to support decision-making by businesses and government. Produces monthly indicators tracking the performance of the sector, guide investment, monitor visitor satisfaction, and inform marketing decisions. Conducts festival surveys, surveys of visitor to attractions (heritage sites, National Park, Anne of Green Gables), and periodic exit surveys at the four entry/exit points (bridge, ferry, airport, and cruise ship) to the island. Other key data include accommodation occupancy, golf, cruise ship passengers.	Research and Evaluation team conducts research on various aspects of the tourism industry & provides the industry with information to enhance effectiveness of future marketing activities & development projects.	**MTOT Role**: Expand distribution and use of key insights from research and analysis; **ITRR:** Conducts travel and recreation research in Montana; primary focus on the nonresident travel survey conducted throughout the state. Best known for producing (widely used) statewide <u>annual</u> estimates of total nonresident visitation and travel expenditures, visitor characteristics, estimate of the economic contribution of nonresident travel to State economy.	Explore Minnesota is the official state tourism marketing board. Recently designed a new marketing campaign, new website, new logo, new advertising campaign and social media sites. Research function has been cut back in recent years; there is only one research analyst now. The state relies on secondary data sources for much of its research. A key goal is to maximize the impact of its marketing dollars by extending its reach through public and private partnerships. Provides tourism businesses with a presence on the state tourism website, and providing avenues for consumers to link to the business and organizations on website; and ensures the tourism sector evolves to reflect consumer and marketing trends. UMN Tourism Research Center is a university-based Extension (applied research) function. Tourism is one area of work along with sustainable development, rural development, education and training initiative (*e.g.,* festival management)

Cont'd…

Appendix E (cont'd…)

	Category/Item	PEI	British Columbia	Montana	Minnesota
12	**Tourism Indicators**	Monthly releases featuring: traffic (bridge counts, air arrivals, ferry passengers, cruise ships, and motor coach passenger); visitor inquiries (English and French , website, call centre, and mail-out kits), parties counselled at VICs, non-member golf rounds, attendance at PEI National Park and Green Gables as well as seven heritage sites, fixed roof accommodation (number of operations, room-nights available, room-nights sold, occupancy) y six regions and by types of accommodation (hotels/motels/resorts; inns, cabins/cottages, tourist homes/B&Bs), campgrounds (total operations, site-nights available, site-nights sold, occupancy - by six regions). visitor origins (Canada, selected provinces, US, and offshore)	*Tourism Indicators* includes: customs entries data (Int'l. arrivals), Cdn. re-entries, travel parties to visitor centres, commercial restaurant receipts, provincial and regional occupancy and average daily room rates (ADR) (by PKF), conference centre (event participation and non-resident delegate-days), regional airports, ferries, cruise, highway traffic volume; VIC visits, *Tourism indicators* also available on Stats BC website - but not current. ● International Arrivals also produced monthly.	**Cross-Agency Data Dashboard** (14 pp.): p. 1 features: "So What (Why is this important?) and Now What? (Actionable Steps); several marketing analytics -- #22 below. **ITRR**: "Interactive Data" -- by clicking on desire point re: Monthly indicators available for: Airport Deplanings Amtrak Ridership National Park System Visitation Nonresident Expenditures Nonresident Expenditures by Location Nonresident Visitation Resident Attitudes Towards Tourism Skier Visits 4% Bed Tax Revenue	Limited for Explore Minnesota. Based heavily on sales tax data. Economic Impact: Sales, Jobs, Revenues; Growth in tourism sales; Jobs by County; Impacts of State tourism advertising (in trips, spending, taxes, intentions, ROI); and the ranking of the state among all states in terms of spending, employment, taxes). Annual accommodations and attractions inventories are provided. UMN Research Center has numerous educational outreach measures.
13	**Frequency of Release**	Monthly	Monthly - *Tourism Indicators* and *International Arrivals* -- with 2 month lag	Dashboard Quarterly; ITRR Interactive data - monthly.	Annual

TOURISM SYNERGY

Appendix E (cont'd...)

	Category/Item	PEI	British Columbia	Montana	Minnesota
14	**Key Visitor or Exit Survey**	Exit survey by port or mode of travel, as described above	No Exit Survey- over 40 exit points; not feasible; BC Stat is used for visitor numbers and spending.	No; ITRR famous for <u>nonresident </u>travel survey conducted throughout the year across the state; ongoing (not an "Exit survey" per se. Surveys year round at 9 locations; follow up survey - with incentive draw for $1000 to participate in follow up -- Detailed: methods for visitation and spending estimation models, data collection, analysis are described on ITRR site, including survey instruments. *http://www.itrr.umt.edu/files/NonresTravelSurvey-Methods-Analysis.pdf*	None - data come from secondary sources or consulting firms
15	**Use of contractors/ consultants**	Yes - yearly economic impact reports	Occasional: on an as-needed basis.	Yes; several elements contracted out; ITRR, Agency analytics, subscription services.	Yes - University of Minnesota Tourism Center does custom research for state. Smith Travel Research is used for accommodation data; Longwoods for advertising impacts; and David Peterson for economic impacts.
16	**Economic Impact: what form does it take; how often released?**	Annually; a version of input-output analysis. Produces GDP, jobs, government revenues	BC Stats measures: Measuring the Size of British Columbia's Tourism Sector: The BC Stats Methodology (developed in 2009).Industry-based approach. Based on the TSA – uses similar input-output tables. Value of Ski Areas to BC (2015); Value of Alpine Skiing (2012-13), Rugby Nationals Econ Impact Assessment (2013) CCAA Women's Soccer National Championships Study (2013), Mountain Biking (2011 - several studies); many other works pre 2010	ITRR (Most recent): ● 2014 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties ● 2014 Nonresident Visitation & Expenditure Estimates - Estimates by full year, quarters, trip purposes & international visitors ● The Economic Review of the Travel Industry in Montana: 2014 Biennial Edition ● 2013 Nonresident Visitation, Expenditures, & Economic Impact Estimates	Estimates of spending, GDP, jobs, and sales taxes attributable to tourism; developed for state as a whole and for regions - also for 3-digit-level industries

Appendix E (cont'd…)

	Category/Item	PEI	British Columbia	Montana	Minnesota
11	● **Information readily available to businesses and researchers** (no registration or membership)	CTR and Tourism PEI have websites for industry, government, and public use, but many studies such as the marketing dashboard and festival survey results are not listed. Semi-annual TIAPEI conference.	Yes - FAQ sheet as well as subscription; http://www.destinationbc.ca/Research/about-research-planning-and-evaluation/Future-Releases.aspx **Page menu:** About Us, Recent releases, FAQ, Subscription, Publications, Contact; **Headings to choose from:** Industry Performance, Research by Region, Market, Activity, TAMS, Resources for Researchers.	**Yes: Cross-Agency Dashboard** (Office of Montana Tourism); **ITRR Menu headings** (web): 1. Interactive Data, 2. Spending & Economics, 3. Publications, 4. Most Recent Findings, 5. Survey kit.	Yes - on Explore Minnesota's website. Annual conference on tourism.
18	**Google analytics:** which ones released to public	Yes, but not released to public: views, time on site, click-through rates, how accessed and user origins, etc; for use by industry only	Not available publicly	Not "Google" per se; Montana Office of Tourism; provide information noted below under "*Cross Agency Dashboard* #22: other social media metrics"	Not available publicly
19	**Other Social media metrics?**	Hootsuite - a social media management platform still under development in PEI	Not available publicly	1.Media, spend, paid search (keyword) average cost per click; 2. Paid search (keyword) average click-through rate; digital display - average click through rate; Social media engagements, social media mentions	No
20	**Advertising conversion models conducted**	ACTP does advertising and web-based conversion studies for Atlantic Canada, including PEI	No. Destination BC does not subscribe to or conduct conversion models or ROI models.	Conversion Study Results (shown in Dashboard, below) - p. 10 - Winter Traveler conversion "funnel"; *nSight for Travel* (compiled from many sources) Share of Search and share of conversion vs. "Rocky Mountain Region (for all sources & international sources by market type (5 types) p. 11-12 Indicators.	Yes - basic measures for impact of state tourism advertising)visitor-generate spending, employment, payroll, taxes, ROI
21	**Research Delivery:** communication methods used.	Through CTR website of TIAPEI and Tourism PEI website; presentation at TIAPEI AGM and conference, biannually	Subscription (Sign up) for monthly e-mail from Research Dept. FAQ sheet telling where info can be found. Glossary of terms provided. www.destinationbc.ca/Research/about-research-planning-and-evaluation/ FAQ.aspx	Online through Montana Office of Tourism & ITRR- ITRR has a sign-up e-mail list. Monthly travel and marketing trends at *montanatourismnews.org*	Department website, outreach/extension offices (especially through Tourism Research Center); annual conference