

PEI Tourism Strategy | April 12, 2024

Growing Tourism Together, a Five-Year Strategy for PEI's Tourism Industry

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ADVISORY

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Information and data found in this document are current as of the date of submission to the client and subject to change given market forces and external variables.

As Directors of the Project Team, we certify the accuracy of all information and viewpoints contained in this submission.

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INTRODUCTION & EXECUTIVE SUMMARY

Prince Edward Island has been a vacation destination for Canadians, Americans and global visitors for over a century. Visitors flock to the destination inspired by the Island's warm welcome, spectacular beaches, parks, family fun, farm fresh food and bounties from the sea and from the books of Lucy Maud Montgomery's *Anne of Green Gables*.

This strong foundation, lead by tourism leadership, operators and communities across PEI have done an excellent job to position, develop and grow tourism on the Island.

But while that foundation remains important to the future of tourism on the Island, for PEI's visitor economy to thrive and grow, PEI's tourism industry must adapt to appeal to new prospective visitors, develop new and enhanced products and experiences, and expand tourism activity beyond PEI's traditional tourism season. In short, to earn more annual tourism revenue, PEI must optimize its yield during its traditional summer season and entice more visitation during the winter and shoulder seasons.

To support this goal, PEI's 5-Year Tourism Strategy recognizes that PEI must attract and cater to a higher yield visitor during the summer and include, in addition to leisure, other channels that may have a higher propensity to fill hotel rooms, attractions and restaurants in the winter and shoulder seasons —meetings and conventions, sports tourism and events. And while this strategy recognizes that PEI's tourism leadership has been delivering on this ambition for many years, this strategy also recognizes the urgent priority to continue along this path and to consider new initiatives to achieve its tourism competitive advantage, grow revenue and attract investors, entrepreneurs and workers to the industry.

Furthermore, to achieve this vision, the strategy recognizes that PEI's tourism industry must also change its

mindset from what tourism has traditionally been to what tourism can become. It must improve its overall enabling environment to create conditions across the Island for tourism to thrive. Prince Edward Island has an opportunity to grow tourism into a year-round industry and to incent new product, experiences, target audiences and channels to reflect that opportunity. And to accomplish this, PEI's tourism industry must identify new sources of funding to support this ambition as its key competitors have done in the past.

The objectives of this strategy are simple:

- 1.** Improve the enabling environment for tourism to thrive. Where key stakeholders in the business of tourism galvanize against common goals and priorities, where tourism is recognized for its potential to enhance the economy and provide solid returns on investment for communities and entrepreneurs, where residents have access to year-round amenities supported through tourism, and where policy and funding support the tourism vision.
- 2.** Optimize the yield from visitors during the traditional summer season and increase visitation during the winter and shoulder season leveraging channels in leisure tourism, meetings and conventions, sports tourism and events to support marketing, product and experience development, and capacity building.

Finally, we are very bullish on the future of tourism on Prince Edward Island. We have every confidence that this is the right strategy for PEI's tourism industry, will drive tourism growth and resilience in the future and embark on a new definition for what tourism can become on the Island.

LAND ACKNOWLEDGEMENT



Epekwitk (Prince Edward Island) is located in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq People. The Epekwitnewaq Mi'kmaq have occupied this Island for over 12,000 years. We honour the "Treaties of Peace and Friendship" which recognized Mi'kmaq rights and established an ongoing relationship between nations.

We are all Treaty People.

ACKNOWLEDGEMENTS

Tourism is a collective endeavor, heavily reliant on the industry it sustains, involving a diverse array of stakeholders and partners who are directly or indirectly involved in creating and maintaining the conducive conditions for the growth of tourism. The 5-Year Tourism Strategy for Prince Edward Island (PEI) was formulated through extensive collaboration with a diverse range of tourism stakeholders and partners across the Island.

We express gratitude for their support, engagement, and contributions aimed at fostering the expansion of tourism, safeguarding the industry against disruptive influences, and exploring innovative approaches to position PEI's visitor economy for a new era in tourism.

Note, some participants listed below may have participated in more than one capacity but are only listed once.

Steering Committee:

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David Groom
Julie Chaisson
Julie Ann Gauthier
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Lori MacGregor
Mitchell Rennie
Rose Dennis
Sam McPhail
Susan Freeman

The regional and tourism vertical groups engaged stakeholders through various methodologies (surveys, interviews, workshops, etc.) to gather additional insights into challenges and opportunities.

ACKNOWLEDGEMENTS *(continued)*

Rural Communities Council:

Amie Swallow-MacDonald
Elmer MacDonald
Gerry Gallant
Giselle Bernard
Kyla DeRoo
Margarite Burns
Michelle Pineau
Mike Randall
Patty Sue-Lee
Terry Nabuurs

Over 180 tourism industry stakeholders were engaged in a unique workshop/survey format during the annual TIAPEI AGM.

And a big thank you to the many not mentioned here who have shared their insights and guidance along the way.

Additional Consultations:

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METHODOLOGY

It is crucial the 5-year Tourism Strategy for PEI is grounded in insights from diverse sources for a comprehensive understanding of the tourism landscape in PEI. Moreover, it aims to secure support and collaboration from partners and key stakeholders with a vested interest in the success of the strategy.

The Discovery & Current Situation Analysis Phase included a project kick-off and a review of existing strategies, plans, and existing research – supported by additional primary and secondary research to support the creation of the Situation Analysis (see Appendix A).

The first phase also involved several methods to engage tourism stakeholders and partners, as well as community

members to gain a better understanding of PEI's challenges and opportunities. This included TIAPEI AGM stakeholder engagement of over 180 industry stakeholders, workshops and interviews, and the engagement of many stakeholders via regional and vertical tourism groups.

In the Assess and Prioritize Plan Phase, key insights were prioritized to address key challenges and opportunities, to inform the strategy and position PEI for long-term, sustainable tourism growth.

In the Recommend and Implementation Plan, these many insights came together into a draft tourism strategy and implementation tracker tool.



PHASE 1: DISCOVERY & CURRENT SITUATION ANALYSIS

- Project kick off materials (Project Charter & Workplan)
- Stakeholder map and identification of level and means of engagement
- TIAPEI AGM stakeholder engagement
- Engagement & communication guides (interviews, workshop, surveys)
- Outside-in situational analysis
- Status updates



PHASE 2: ASSESS AND PRIORITIZE

- Inside-out Situation Analysis
- Validation workshop materials
- Prioritization Lab materials
- Draft tourism strategy
- Status updates



PHASE 3: RECOMMEND & IMPLEMENTATION PLAN

- Final detailed tourism strategy
- Implementation tracking tool
- Status updates

HOW TO READ THESE DOCUMENTS

The framework used to structure the 5-Year Tourism Strategy for PEI is rooted in evidence, informed by a detailed understanding of the tourism context, through engagement including a myriad of interviews, workshops, and an in-person survey workshop with tourism leaders and tourism stakeholders, to structure a path forward.

The strategy begins by laying out tourism values, through key considerations under which this strategy has been developed and guiding principles that PEI and its key tourism and civic stakeholders want to ensure remain constant as it executes its strategic plan moving forward.

It is followed by areas or themes of strategic importance, before setting the vision – along with the strategic goals and objectives necessary to achieve that vision.

With the vision, strategic goals, and objectives set, details of the strategy begin to emerge with a breakdown of initiatives by pillar, along with key tactical actions, timelines, responsible stakeholders, and measures for each to ensure the successful implementation – over the months and years to come.

A supplementary resource guide and appendix has been developed to provide data-driven support for the strategy and detailed explanations and examples of key concepts in this strategy. Both reports are in separate documents but referenced throughout this strategy.

KEY CONSIDERATIONS	What are the parameters under which this strategy is to be developed?
GUIDING PRINCIPLES	Values that guide the tourism strategy through its 5-year implementation
STRATEGIC THEMES	Bottlenecks and barriers that need to be addressed, as well as potential prospects to consider
VISION	Aspirations we hold for this strategy to help drive PEI's tourism industry to reach its potential given resources and capacity available
STRATEGY AT A GLANCE	What are we trying to achieve with this strategy? How will we reach the vision for tourism on PEI?
GOALS & OBJECTIVES	Broad and longer-term outcomes along with shorter, more measurable ones
PILLARS & INITIATIVES	Initiatives organized into pillars to support tourism development that: <ul style="list-style-type: none">Can be supply-driven to leverage a competitive opportunityCan be demand-driven such as an under-targeted group of visitorsAre prioritized based on impact and ease of implementation

TACTICAL PLAN

Includes rationale, actions, responsible parties, timelines, and measures of success that:

- Support implementation of tourism development vision, goals, and objectives
- Ensure conditions for success are met and that there are sufficient resources to undertake actions
- Support management of tourism enabling environment and infrastructure support for destination development
- Include approaches for targeting key markets in support of the tourism development plan

APPENDIX

Includes Phase 1 key research highlights including a situational analysis and findings from the TIAPEI AGM roundtables.

RESOURCE GUIDE

A collection of additional research, case studies, and explanations of key concepts outlined in the strategy. The resource guide aims to educate on, and provide tools for, the further application of strategic initiatives.

KEY CONSIDERATIONS IN SUPPORT OF THE STRATEGY

Based on research, stakeholder engagements, workshops and surveys we have determined the key considerations and principles that guide PEI's tourism strategy.

This strategy will be guided by the following principles.

PEI will develop a tourism strategy that:

1. Is driven by research and consultations with stakeholders and guided by the recommendations of the Steering Committee to be "strategically ambitious" in the plan.
2. Recognizes all key stakeholders and shareholders in PEI's tourism industry, including all levels of government, residents, operators, communities and not for profits.
3. Builds on the success of the previous strategy, the efforts of tourism leadership in PEI and the strategy Implementation Committee and recognizes the priorities that have been addressed and those that are in progress.
4. Recognizes the foundational key strengths of tourism on PEI—summer, beaches, golf, Anne of Green Gables and more recently, culinary.
5. Seeks to plant the seeds to significantly improve the contribution that tourism can make to PEI's economy and communities.
6. Demonstrates the importance of tourism to PEI's economy and social fabric to residents, operators, industry, government and communities and support an improved quality of life for all residents.
7. Leverages all tools and channels and market segments to support tourism's opportunities and mitigate its challenges.



GUIDING PRINCIPLES

Guiding principles represent the shared values and beliefs of a destination’s key partners and tourism industry. For PEI, these serve as a filter from which to guide sometimes difficult decisions that need to be taken, and which apply in all circumstances, regardless of changes in goals, priorities, initiatives, or leadership.

4 guiding principles:

1. Support collaboration and respect for all stakeholders, shareholders, operators, regions, and communities across PEI.
2. Keep an open mind for what the potential for tourism can be over what tourism has traditionally been. A strategy that is bold, visionary, and confident – but also attainable.
3. Support the development of a responsible and regenerative tourism industry which respects PEI’s heritage, residents, experiences, Indigenous nations, land, communities, and the environment.
4. Create the enabling environment from across governments and communities to develop and nurture tourism to thrive.



STRATEGIC THEMES



Themes and opportunities reflected in this strategy fall primarily under two common umbrellas.

The first theme facing tourism is the need for a strong tourism enabling environment to guide the growth of tourism on the Island, foster economic advancement, and social enrichment in PEI. This challenge is mitigated through cooperation with essential partners and stakeholders, clear communication of the power and potential of tourism on PEI, meaningful engagement with stakeholders from across the Island, and strong tourism leadership.

The second theme recognizes the two tourism seasons on PEI. In the traditional summer season, demand exceeds supply of tourism assets. During the summer, there is an opportunity to optimize total tourism revenue through a combination of product development and marketing to higher-yield visitors. The rest of the year, the winter and shoulder seasons, the challenge is to develop and enhance tourism products and experiences in leisure, events, sports tourism, and meetings/conventions, and

importantly change the mindset to increase understanding for the potential of tourism to develop in the shoulder and winter seasons and support increased year-round visitation to the Island.

Research conducted to support the 5-Year Tourism Strategy for PEI involved a thorough examination of the present tourism landscape and the broader civic environment of the Island. The aim was to identify both immediate obstacles and systemic issues affecting tourism on the Island as well as opportunities.

This information was gathered directly from tourism stakeholders across the Island, along with input from various other tourism operators and partners. Additionally, insights were gleaned from the consulting team's extensive on-site visits and comprehensive engagement with stakeholders.

Though not exhaustive, the following list highlights the elements of strategic importance for PEI's tourism sector.

Stragic Theme	Description	Potential Impact	Management/Actions
1. A traditionally short leisure tourism season	<p>PEI has been traditionally viewed as a summer destination. The Island offers exceptional summer experiences, beaches, camping, BBQs, lobster suppers, golf, water sports, and more.</p> <p>The short tourism season strongly focuses on the leisure market.</p> <p>There is a ‘chicken and egg’ situation as businesses don’t stay open past the summer season because there is a lack of visitors, but visitors do not want to go to PEI in other seasons because businesses aren’t open.</p>	<p>The focus on summer limits the total number of visitors to the Island, as capacity in the summer fills quickly.</p> <p>A shorter tourism season impacts:</p> <ul style="list-style-type: none"> Potential attraction of year-round labour Prioritization of tourism by governments and communities as a viable industry Lower return on total investment in tourism assets Difficulty in attracting new product and investors; and The total investment in tourism from communities and governments. 	<p>Utilize a surgical approach to fill tourism year-round with tactical market focus for each month including general and high-yield leisure, meetings/conventions, sports, events, and niche leisure markets.</p> <p>Incentivize businesses to stay open past the summer season to provide depth and breadth of experiences for visitors.</p> <p>Attract cruise visitors during the spring and summer months to add to the high-yield of the summer without needing additional infrastructure (i.e., hotels).</p>
2. A fixed mindset on what tourism is	<p>Many residents and local tourism stakeholders hold a traditional mindset that tourism entails the summer season, with the traditional tourism product offerings.</p> <p>With a fixed mindset of what tourism is there is little room for the tourism industry, communities, and governments to consider what tourism could be.</p> <p>Currently, there are significant barriers to the potential of a vision for tourism growth. A mindset shift needs to be driven by PEI’s tourism leadership and embraced at every level throughout the Island.</p>	<p>The current mindset is reflected in the product, experiences, hours and days of operation, seasons, customer services, and more.</p> <p>Without a strong tourism mindset, tourism products and offerings may suffer.</p> <p>Mindset limits the vision of potential investors and entrepreneurs to invest in the industry.</p> <p>Mindset limits communities to invest in tourism.</p>	<p>Inspire a shift in tourism mindset from all levels.</p> <p>Educate and inform community members on the importance of tourism for the wider province and community – across all seasons.</p> <p>Motivate politicians to embrace tourism as a key economic driver on the Island.</p>

Stragic Theme	Description	Potential Impact	Management/Actions
3. A lack of funding for tourism marketing and management	<ul style="list-style-type: none"> For tourism on the Island to become more competitive and grow, more funding will be required. Funding (including the marketing budget) for Tourism PEI have not increased despite the continuous rise of global inflation. 	<ul style="list-style-type: none"> Nearly all surrounding and competing destinations utilize an alternate funding model, specifically a tourism levy, to supplement budgets. By not implementing an alternate model, PEI is losing potential tourism dollars that could be used to support future growth. To diversify into and attract new major markets to PEI of higher-yield visitors, Tourism PEI needs more investment for major marketing campaigns and to develop new products and experiences to support. Significant investment is required for additional products and experiences that could be supported by an alternate funding model. 	<ul style="list-style-type: none"> Adopt an alternative funding model so that PEI's tourism industry can have additional revenue to support strategic objectives. Create an alternate funding model task force to collaboratively guide the process of this model.

4. Declining service levels of tourism operators	<ul style="list-style-type: none"> Current tourism product and service standards needs refreshing to meet tomorrow's traveller demands. PEI has been known as a high-end and high-cost destination with rising prices on the Island, however prices must accompany perceived value. Though some studies suggest strong value for money for PEI. The declining service levels are linked to labour issues where there is not the time or adequate staff to provide top-level service. Business hours are not always consistent and can be short which can reduce offerings for visitors in the evenings. 	<ul style="list-style-type: none"> If PEI wants to attract a high-yield visitors, the value (including the product itself and the service at the product/ experience) needs to match the price of offerings to avoid brand malalignment. If tourism offerings and experiences do not meet visitor expectations, this could create a negative impression of PEI, deterring these visitors from returning and potentially creating bad word-of-mouth and reputational harm. 	<ul style="list-style-type: none"> Develop a customer service delivery training program for tourism businesses to improve service levels. To encourage participation, consider incentivizing those who complete the program with memberships to TIAPEI or even funding opportunities. Create an aligned vision for service delivery in PEI so organizations like Tourism PEI, TIAPEI, RTAs, and DMOs can keep tourism businesses accountable.
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Stragic Theme	Description	Potential Impact	Management/Actions
5. Labour acquisition and retention	<ul style="list-style-type: none"> ● For years there have been difficulties attracting and retaining tourism labour in PEI. ● Following the COVID-19 pandemic, tourism was not seen as viable career option and former staff have turned to different industries. ● Legal restrictions can make it more difficult to welcome labour from other countries, while university students are limited to the summer months of the year. 	<ul style="list-style-type: none"> ● Without tourism labour, the tourism industry can not function. ● Employees that are working in the industry are often over-worked in the summer season due to severely limited staff, resulting in a reduced desire for seasonal extension. 	<ul style="list-style-type: none"> ● Launch a Work in PEI campaign, explaining the perks of working in PEI over other destinations and foster a positive working environment. ● Address labour retention by subsidizing needs of tourism industry employees such as affordable housing and reliable transportation. ● Create a labour acquisition and retention strategy to outline how this issue could be mitigated in the long-term. ● Carry forward the implementation of the TIAPEI-led Tourism Workforce Action Plan.
6. Ageing, underutilized, and overpriced infrastructure	<ul style="list-style-type: none"> ● Appropriate facilities are needed to support year-round events across the Island. The affordability of existing infrastructure makes it difficult to rent certain spaces (e.g., performance spaces) and rather than adjusting pricing of existing facilities, new facilities are sometimes developed. ● Infrastructure supporting sports, meetings/conventions, and events are becoming outdated. ● Infrastructure relating to hotels, restaurants, transportation could benefit from investment for improvements. 	<ul style="list-style-type: none"> ● Infrastructure that is outdated for sports, meetings/conventions, and events puts PEI behind in supporting these tourism markets, making it less competitive against peer destinations. ● The high expense to utilize certain arts and cultural spaces reduces the ability of local stakeholders to develop tourism experiences. 	<ul style="list-style-type: none"> ● Seek capital incentive for improving infrastructure which exists for most other main industries in PEI besides tourism. ● Develop a pricing structure for local groups to utilize arts and meetings/conventions spaces to contribute to more space utilization. ● Determine which spaces are ageing, underutilized, or overpriced and identify strategies to combat the sub-optimal conditions.

Stragic Theme	Description	Potential Impact	Management/Actions
<p>7. Limited air access and intermodal transportation on the Island</p>	<p>Both reaching PEI and exploring the Island upon arrival, remain a challenge for the province.</p> <p>Limited public transportation routes across the Island make it difficult for those without a car to venture around the Island. This is partnered with limited ride sharing capability during the summer season.</p> <p>Flight costs, timing of flights, and the low number of direct flight from potential markets further contribute to this challenge.</p>	<p>A lack of an Island-wide public transit system limit the ability for visitors to make a more meaningful economic impact Island-wide while also reducing unique accessible experiences for a large segment of travellers.</p> <p>Reduced air access limits long-haul markets who historically stay and spend more when visiting the Island.</p>	<p>Support the current momentum of air access and intermodal transportation development.</p> <p>Continue to adapt and support the Sustainable Transportation Action Plan.</p> <p>Continue to support the Ground Transportation Committee.</p> <p>Support efforts to improve the enabling environment conditions around transportation to be conducive for attracting air and rental companies.</p>
<p>8. Need to increase Indigenous tourism offerings to meet demand</p>	<p>Demand for Indigenous tourism offerings has been increasing globally, and while PEI has some Indigenous tourism offerings, these remain light.</p> <p>Indigenous tourism must be Indigenous-led. However, in PEI there is a lack of capacity and Indigenous tourism labour to create and sustain Indigenous tourism offerings.</p>	<p>Failing to support the development of authentic and Indigenous-led tourism products and experiences could significantly limit the potential of this market and PEI's unique positioning.</p> <p>Indigenous tourism can help to preserve and educate on Indigenous culture and offers an avenue to acquire funding from visitors to support cultural preservation.</p>	<p>Create a capacity building program for Indigenous tourism operators to gain the tools and knowledge to successfully build Indigenous tourism products and experiences.</p>
<p>9. Regional dispersion</p>	<p>Tourism on PEI needs to recognize the importance of growth and potential for tourism in all regions.</p> <p>Regions across PEI offer different tourism products and are at varying levels of development.</p>	<p>With tourism more strongly developed and visited in some areas, over others, the economic impact of tourism may not be as strongly felt across the Island. This may reduce the greater tourism mindset and the overall importance and prioritization placed on the industry.</p> <p>If visitors consistently only visit certain areas of the Island, these areas may become loved to death. Simultaneously visitors could miss out on other, equally impressive and unique areas of the Island.</p>	<p>Promote products and experiences across the entirety of the Island so when visitors go to PEI, they do not think of the regions as separate destinations, but rather, as a cohesive experience.</p> <p>Utilize tourism product clustering to share where there are popular activities for certain tourism markets and disperse visitors based on interests.</p>

Stragic Theme	Description	Potential Impact	Management/Actions
10. Maturing product	<p>The tourism product in PEI is ageing from both a physical and innovation standpoint.</p> <p>The tourism product offerings have remained staples in PEI (e.g., beach, family attractions, outdoor recreation), which can create a reliable destination. However, a failure to update and innovate with changing visitor expectations and needs could lead to a stale tourism product and reduced visitation.</p> <p>Physical spaces that house tourism products, like accommodations, have been keeping comparatively high prices but not performing capital improvements which creates a sense of lower perceived value for visitors.</p>	<p>If the tourism product in PEI does not respond to the increasing demands of tomorrow's traveller, they could lose substantial market share.</p> <p>If facilities are not updated to match the price of tourism assets, the perceived value of these spaces will continue to decrease and push visitors out of PEI in favor of alternative destinations that can better match their needs and expectations.</p>	<p>Provide a clear list of investors, funding, and resources for both innovative tourism product and physical improvements.</p> <p>Share an easily accessible calendar of events and Island happenings with locals and visitors, both hard copy and digitally, to inform people about the already innovative activities occurring.</p> <p>Complete a tourism asset inventory and gap analysis to determine which products could be missing to round out the visitor experience.</p> <p>Host an innovation in tourism event with TIAPEI for tourism businesses to share how they are bringing their business and tourism offerings to the next level.</p>

11. Attracting entrepreneurs and investors	<p>Investor attraction is difficult in many tourism destinations however it is necessary to encourage and attract private sector investment to generate additional funding.</p> <p>PEI tourism businesses face insufficient funding for capital improvements as well as developing innovative ideas. While there are economic development resources in PEI, these do not have a focus on tourism, making it more difficult for tourism entrepreneurs.</p> <p>Youth are not engaged in, or educated about, tourism's economic and community impact or how they could pursue a meaningful career in the industry.</p>	<p>Without proper funding and support for entrepreneurs, the PEI tourism landscape may be unable to innovate and attract new and higher-yield markets.</p> <p>If the environment isn't conducive for tourism investment, potential investors may take their funding to competitor markets which will actively oppose tourism in PEI.</p>	<p>Complete an investor readiness assessment to determine how ready PEI is for attracting investors.</p> <p>Evaluate the enabling environment for entrepreneurs and investors and determine areas for improvement.</p> <p>Educate youth on the importance of tourism in the community and their potential to own and operate PEI tourism businesses.</p> <p>Incubate innovative tourism ideas with potential entrepreneurs and empower them to develop their ideas.</p>
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Stragic Theme	Description	Potential Impact	Management/Actions
12. Collaboration between PEI's tourism leadership and regions	<p>There is an opportunity to improve collaboration and communication between and amongst Tourism PEI and regional tourism organizations.</p> <p>Funding for all tourism organizations in PEI are lower than desired and by operating as fully siloed organizations, there is the missed opportunity to collaborate on tasks such as marketing as a means to maximize funding.</p>	<p>Tourism requires a unified vision to make meaningful progress. If the province and regions remain operating in silos without sufficient communication, tourism progress will slow, reducing the Island's ability to reach a common goal.</p> <p>A lack of communication and collaboration between these organizations could result in redundancy and inefficiency in marketing and management efforts.</p>	<p>An updated tourism delivery model is under development which aims to improve the transparency between the provincial and regional tourism leadership.</p> <p>Align regional tourism strategies with the provincial tourism strategy.</p> <p>Co-op marketing potential to maximize the limited marketing budgets at all levels.</p>

13. Fickle Maritime source market	<p>The Maritime market (i.e., nearby New Brunswick and Nova Scotia), has been a bread-and-butter market for PEI for years.</p> <p>Due to their proximity to the Island, it is easy for Maritime visitors to travel to PEI; however, these visitors spend less money than visitors travelling from further distances and because they are a drive-in market, they can easily decide not to visit PEI if there are sub-optimal conditions (e.g., inclement weather).</p>	<p>An overreliance on the Maritime market could result in lower tourism revenue if they reduce their travel to PEI, especially in the wake of unexpected climate-related events and rain.</p> <p>Continued use of marketing in the Maritime markets reduces the amount of funding available to reach additional markets that may attract higher-yield and less weather-dependent visitors.</p>	<p>Collaborate with regional tourism organizations to allow for the RTAs and DMOs to market to the Maritime markets on more local events to bring out visitors. This allows the provincial tourism organization the bandwidth to focus on further and higher-yield markets.</p>
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Stragic Theme	Description	Potential Impact	Management/Actions
14. Inconsistent hours and business operations	<ul style="list-style-type: none"> ● During the COVID-19 pandemic, tourism businesses faced restrictions on business hours and labour. Some businesses operated on a shorter schedule (e.g., closing early) and decided to maintain reduced hours of operation post-pandemic. ● Visitors require places to eat and experiences to participate in. Year-round businesses such as restaurants close early reducing the quality of experience as well as the visitor's ability to contribute to the local economy through activities such as dining options or taking part in night life. ● In the shoulder and winter seasons, many businesses, particularly in hyper-seasonal regions, are closed and can create the appearance of a ghost town. There is a chicken and egg situation where businesses do not stay open if visitors are not coming but visitors do not want to visit if businesses aren't open. 	<ul style="list-style-type: none"> ● If visitors cannot predict when businesses will be open, trip planning becomes more difficult. Sporadic business hours as well as early closings of businesses can reduce the number of products and experiences visitors can participate in, reducing the economic spend and impact in PEI. ● When business operations are not consistent and are not communicated well, this can have significant impacts for tour operators, residents, and visitors. 	<ul style="list-style-type: none"> ● Address labour shortage and employee burnout issues to empower businesses to have longer operating hours to accommodate visitors during the summer season. ● Develop shoulder season business guidelines to assist businesses still open during the shoulder and winter seasons to gain maximum tourism revenue. ● Clearly communicate with visitors which businesses are open and operating during the shoulder and winter seasons so they can have access to accommodations, food and beverage, activities, and more.

15. Federal and provincial park facilities	<ul style="list-style-type: none"> ● Federal and provincial park facilities are open for a limited duration throughout the year which reduces outdoor recreation potential year-round. ● While some of the park facilities are amendable to partnering with private sector to enable operations during the shoulder and winter seasons, funding would be required for the maintenance and upkeep of these parks during these seasons, which would include maintaining trails and visitor facilities. 	<ul style="list-style-type: none"> ● Parks are foundational for many visitor activities in PEI which often revolve around outdoor recreation, culture, and beaches. Without operation during the shoulder and winter seasons, tourism opportunities are severely limited. 	<ul style="list-style-type: none"> ● Extend the season that Parks Canada operates in PEI to support increased outdoor recreation and culture visitation. ● Determine the terms for private sector to operate in the parks when federal or provincial government is not managing. ● Identify key tourism operators who are interested in utilizing the parks space for activities and form a group for the collaborative utilization of the parks. ● Seek additional funding to support the extension of the operating season of provincial and federal parks. ● Continue to grow and increase utilization of the Mark Arendz Provincial Ski Park (both Nordic and Alpine venues) in all seasons.
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Strategic Opportunity	Description	Potential Impact	Management/Actions
<p>16. Address seasonality</p>	<ul style="list-style-type: none"> While the summer season has typically been the primary source of tourism revenue in PEI, there is strong potential to address seasonality on the Island through alternative tourism offerings and engaging different markets. 	<ul style="list-style-type: none"> With a strategic approach to address seasonality, there is the potential to gain higher-yield visitors during the summer season and a higher volume of visitors during the shoulder and winter seasons. Exploring new avenues for tourism beyond the mainstream summer leisure market can create a richer visitor experience year-round and support additional jobs, community initiatives, and overall provincial objectives. 	<ul style="list-style-type: none"> Encourage cruise visitation in spring and summer, with a regional approach Package seasonal tourism or niche products. Take a surgical approach to addressing each month of the year, leveraging different tourism tools and building on sports, meetings/conventions, and events markets. Focus on attracting different markets for different months of the year. Build upon existing seasonal expansion strategy.
<p>17. Shift tourism mindset</p>	<ul style="list-style-type: none"> A limited understanding and mindset on what tourism is can hold back tourism in PEI from what it could be. Tourism is currently perceived to be mostly about leisure, beach, golf and in Charlottetown and Cavendish. The prevalent perception is that tourism happens only in the summer months. Successfully shifting the tourism mindset in PEI is rooted in helping communities across the Island to understand the importance of tourism not only for smaller businesses, but for PEI as a whole. 	<ul style="list-style-type: none"> A mindset that tourism is a strong contributor to the economy and that communities across the Island can help bolster tourism development and investment. Tourism can not be sustained without buy-in from all communities across the Island. A shift in tourism mindset can therefore create a greater competitive edge for the Island and increase competitiveness for businesses. 	<ul style="list-style-type: none"> Supported by data, focus on clearly telling the tourism story such as examples of SMEs that have thrived in tourism, how tourism financially support other provincial efforts (like healthcare, transportation, and more.), etc. Create a calendar of festivals, events, and activities in PEI for both locals and visitors. Document how tourism projects like the NHL partnership is driving tourism potential and growth. Leverage TIAPEI and the regional tourism organizations to communicate the shift in mindset of what tourism is, and what it could be for the Island.

Strategic Opportunity	Description	Potential Impact	Management/Actions
<p>18. Foster government and community prioritization of tourism</p>	<p>Despite generating high revenues for the government and communities through its activities, tourism is not always recognized as a priority.</p> <p>In alignment with a shift in tourism mindset, an increase in government and community prioritization of tourism could result in a deeper understanding of the importance of tourism. Further, this can support the creation of paths for sustainable development through investment, entrepreneurship, and community ownership of tourism assets.</p>	<p>The incorporation of tourism into community plans and government initiatives could allow communities to more deeply harness the positive impacts of tourism and provide an avenue to address issues within the industry at a local level.</p>	<p>Encourage the incorporation and prioritization of tourism into community plans.</p> <p>Showcase the importance of tourism in towns across PEI and how each community benefits from tourism across the Island.</p> <p>Promote visitor dispersion through on-Island marketing.</p> <p>Identify potential tourism investment opportunities to support development through entrepreneurs and investors who can help fill the gap.</p>

<p>19. Develop an alternate funding model</p>	<p>PEI faces a limited amount of funding to effectively carry out its destination management and marketing activities.</p> <p>PEI's funding has failed to keep pace with global inflation and increasing costs.</p> <p>In alignment with Canadian tourism industry standards, PEI's competitor destinations utilize alternative funding models to support strategic initiatives.</p> <p>An alternate funding model could provide additional sources of funding for destination management and marketing.</p>	<p>If an alternate funding model is not utilized, nearby and competitor destinations could continue to have a leg up on PEI.</p> <p>An alternate funding model could not only provide more funding for tourism management and marketing but for tourism development at the provincial and regional levels.</p>	<p>Implement a provincial tourism levy or other alternate funding model to gain extra tourism revenue.</p> <p>Utilize co-op or strategic marketing between Tourism PEI and regional RTAs and DMOs to maximize marketing funding impact.</p>
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Stragic Opportunity	Description	Potential Impact	Management/Actions
20. Promote tourism growth and destination development areas to support other key sectors	PEI faces a number of issues that can be supported through broader destination development such as inter-modal transportation, air access, labour attraction and retention, and more.	Identification of mutually beneficial advancements in other sectors (such as accessible transportation and affordable housing), which also benefit tourism (such as labour retention).	Offer authentically PEI courses to educate tourism employees on PEI offerings and hospitality standards. Continue with labour force attraction and retention.
	Tourism is tangentially related to many different sectors in the province, therefore supporting key priorities in other sectors can support destination development efforts.	With greater destination development, visitors may be able to explore more areas of PEI and disperse the economic impact more widely throughout the Island.	Build upon actions of Ground Transportation Committee and continue with increased air access efforts especially in the NE USA and other potential high-yield markets.

21. Encourage tourism growth and new product development	While PEI has some strong cornerstone tourism assets, without updating and diversifying product, it can risk becoming stale with younger and new markets.	Tourism product development could inspire innovation from entrepreneurs and subsequent investment to continue to grow the industry.	Expand the diversity of tourism offerings to encourage niche tourism development and marketing, including: <ul style="list-style-type: none"> ○ Culinary and wellness experiences ○ Luxury' tourism products ○ Increased experiential travel ○ Indigenous-led tourism offerings
	PEI is ripe for expanding and developing new tourism products for tourism growth through a variety of different niche markets including culinary, wellness, Indigenous, luxury, and more.	The development of fresh tourism products could attract new markets and help PEI reach its target markets (i.e., higher-yield summer visitors and higher volume visitation in the shoulder and winter seasons).	
	Further opportunities include continued development more bread-and-butter market opportunities such as family attractions, Anne of Green Gables/literary, and outdoor recreation, etc.	Expanding products in PEI could help to showcase the uniqueness and versatility, challenging traditional views from locals and visitors of what the tourism industry in PEI could be.	Develop a tourism asset inventory to help entrepreneurs understand what assets need to be developed for tourism in PEI.

VISION



The defined vision for PEI's tourism industry provides an aspirational view of the future long-term sustainable tourism growth for the province that is meant to inspire tourism stakeholders, partners, funders, operators, and PEI residents. The vision represents the hope for the kind of tourism that PEI wishes to achieve as it aims to accomplish its goals and objectives – a tourism future developed by design.

PEI's tourism strategy fosters the conditions that support the development of a **vibrant, year-round destination** for visitors choosing PEI for **vacation, meetings/conventions and conferences, sports, family and friends, or events** which will increase **total annual tourism revenue** in the primary season and **increase visitation during the winter and shoulder seasons.**

STRATEGY AT A GLANCE

A OBJECTIVE A

OPTIMIZE TOURISM ENABLING ENVIRONMENT

Optimize PEI's tourism enabling environment to support strategic priorities to help PEI's tourism industry achieve its full potential.

Recognizing support for increased funding, the roles of the entire visitor economy, and community support for regional tourism development and the need to change the mindset of what tourism can be to PEI.

OUTCOME

Creating the best possible conditions for tourism to develop and thrive on the Island.

B OBJECTIVE B

INCREASE TOTAL ANNUAL TOURISM REVENUE

Increase total tourism revenue for PEI by recognizing the potential to increase yield and revenue during the traditional summer months and increase visitor volume during the winter and shoulder seasons.

2.1 Targeted Marketing & Sales

Prioritizing visitors with the greatest propensity to visit and the highest potential yield by leveraging the best channels in leisure, meetings/conventions, events and sports tourism on a season-by-season basis.

2.2 Product Development

Develop and enhance new high-yield product and experiences that reflect gaps in the product offering across all regions of PEI, and across all seasons for leisure, meetings/conventions, sports tourism, and event channels.

2.3 Improving Tourism Capacity

Focus on improving PEI's tourism resilience; developing more experiential tourism assets and improving on the overall visitor experience to increase tourism yield and revenue.

OUTCOME

Developing the right tools, channels, tourism verticals and customer segments, enabled through tourism leadership in PEI, to meet the demands of tourism visitors in all the seasons while optimizing tourism revenue.

STRATEGY AT A GLANCE

A OBJECTIVE A

The first priority is to improve PEI's tourism enabling environment by prioritizing regional, local and provincial government resource alignment to support and prioritize tourism. Improving the enabling environment means ensuring that all organizations, departments, institutions, operators, regions, communities and other key stakeholders across the Island both recognize the importance of tourism and are optimized to support it by working collaboratively to build and execute PEI's tourism strategy. With an optimized enabling environment, policy deficiencies can be addressed, funding models supported, priorities linked to regional tourism development and growth can be recognized, while at the same time, programs that support the attraction of labour, air access, entrepreneurs and investors can be developed and enhanced.

OPTIMIZE TOURISM ENABLING ENVIRONMENT

Optimize PEI's enabling environment for tourism to address its key challenges, leverage opportunities and thrive and grow.

OPPORTUNITY

While the tourism enabling environment is well established, there is an opportunity to galvanize all organization stakeholders and shareholders against a common goal to significantly improve PEI's tourism opportunity.

APPROACH

- Communicate the importance of tourism to all key stakeholders.
- Address funding shortfall.
- Address the mindset and galvanize under a common vision for tourism.
- Inspire all organization to align against a common strategy to support tourism.
- Support policy that reflects the vision.
- Improve tourism priorities across all communities on the Island.



STRATEGY AT A GLANCE

B OBJECTIVE B

Concurrent to the development and optimization of the enabling environment is the recognition that there are **two distinct tourism seasons** on the Island. The first is the traditional summer leisure tourism season which has dominated tourism development and marketing for many decades, and which has created an ingrained mindset on what tourism is for the Island. During many of the weeks of summer, demand for PEI's tourism assets exceed supply.

The first strategic priority is to attract and service as many **high yield visitors as possible who spend more money and stay longer on the Island to optimize the yield and revenue**. This will involve both the development of increased higher-yield, high-demand tourism products and services, increase the capacity to service those higher-yield travelers and to concentrate our marketing, partnerships, and channels to reach the higher-yield visitors from fly markets (e.g., Ontario and Quebec, North East US, and international).

The second strategic priority is to address the **winter and shoulder season which is under-developed relative to its potential**. Efforts in support of improving tourism performance in the winter and shoulder seasons is to recognize that other **tools beyond leisure tourism may be more effective to attract visitors**.

These include enhancing meeting and convention visitation, sports tourism, culinary tourism and major events in addition to leisure. In order to support tourism in these seasons, much more capacity development will be required. Additionally, investments in development and enhancement of new tourism products and infrastructure to attract investors and entrepreneurs, as well as taking on a more surgical approach to marketing PEI on a month by month, season by season basis, will be required. And given the relatively new direction, success will rely on a shift in mindset from tourism leaders and stakeholders to recognize that tourism is no longer constrained by the traditional summer season.



STRATEGY AT A GLANCE

B OBJECTIVE B

INCREASE TOTAL ANNUAL TOURISM REVENUE

Increase total annual tourism revenue for PEI by recognizing the potential to increase yield and revenue during the traditional summer months, and increase visitor volume during the winter and shoulder seasons.

	Targeted Marketing & Sales	Potential Impact	Management/Actions
Opportunity	Continue to optimize tourism revenue in the prime summer months and significantly increase visitation during the winter and shoulder seasons through targeted marketing to reach the highest potential visitor by season.	Significantly improve on developing and enhancing higher-yield tourism products, experiences and assets across all regions in PEI to attract visitors in the prime summer season, as well as the winter and shoulder seasons.	Significantly improve the service delivery, customer experience and experiential tourism offering from private and public sector operators. Develop models to optimize pricing to increase yield and develop tools to reflect a more robust and resilient industry in the face of future change.
Approach	<p>Engage in highest potential return on marketing programs with focus on higher revenue visitors in the summer (long-haul, North East US, fly market, and international) and short-haul leisure markets in the winter/shoulder season.</p> <p>Leverage other channels (sport, meetings/conventions, events in addition to leisure) where they hold high potential for visitation.</p>	<p>Conduct research to better understand the product, asset, and experience gaps in PEI and potential drivers of future tourism demand.</p> <p>Develop programs to help improve customer service with incentives to participate.</p> <p>Target and attract entrepreneurs to develop or enhance product and assets in demand.</p>	<p>Continue to invest in market research to understand how to improve on managing traveller expectations and improve tourism products and marketing.</p> <p>Develop training programs to improve developing experiential tourism products and customer experience.</p> <p>Adopt resilience and risk management programs to reflect climate change and possible future pandemics.</p> <p>Help operators price their experiences and assets to reflect demand.</p>

GOALS & OBJECTIVES

A OBJECTIVE A

OPTIMIZE TOURISM ENABLING ENVIRONMENT

Optimize PEI's tourism enabling environment to support strategic priorities to help PEI's tourism industry achieve its full tourism potential

B OBJECTIVE B

INCREASE TOTAL ANNUAL TOURISM REVENUE

Increase total tourism revenue for PEI by recognizing the potential to increase yield and revenue during the traditional summer months and increase visitor volume during the winter and shoulder seasons. (See Resource Guide 8 for information on dynamic pricing and increasing total tourism revenue).



SUPPORTING OBJECTIVES

1 LEADERSHIP & COLLABORATION

Increase alignment and collaboration across all key stakeholders to streamline experiences for residents and visitors

Increase value of tourism with funders, key partners and stakeholders, communities across PEI and residents

Increase funding to support additional resources and programming in alignment with strategy priorities

2 ECONOMIC

Increase total annual yield and tourism revenue through optimizing revenue during the summer and volume during the winter/shoulder season.

Increase number of experiences and tourism assets that are high yield, market-ready and dispersed across the Island for longer stays, repeat visitation, and more revenue.

Improve tourism capacity to deliver to higher yield visitors, optimize pricing and help operators adapt to changing conditions impacting tourism.

3 SOCIAL, CULTURAL & ENVIRONMENTAL

Support development and alignment to a new tourism narrative for PEI that is reflective and authentic to its residents and stakeholders on the value and importance of tourism and contributes to PEI's unique and authentic "Islandness";

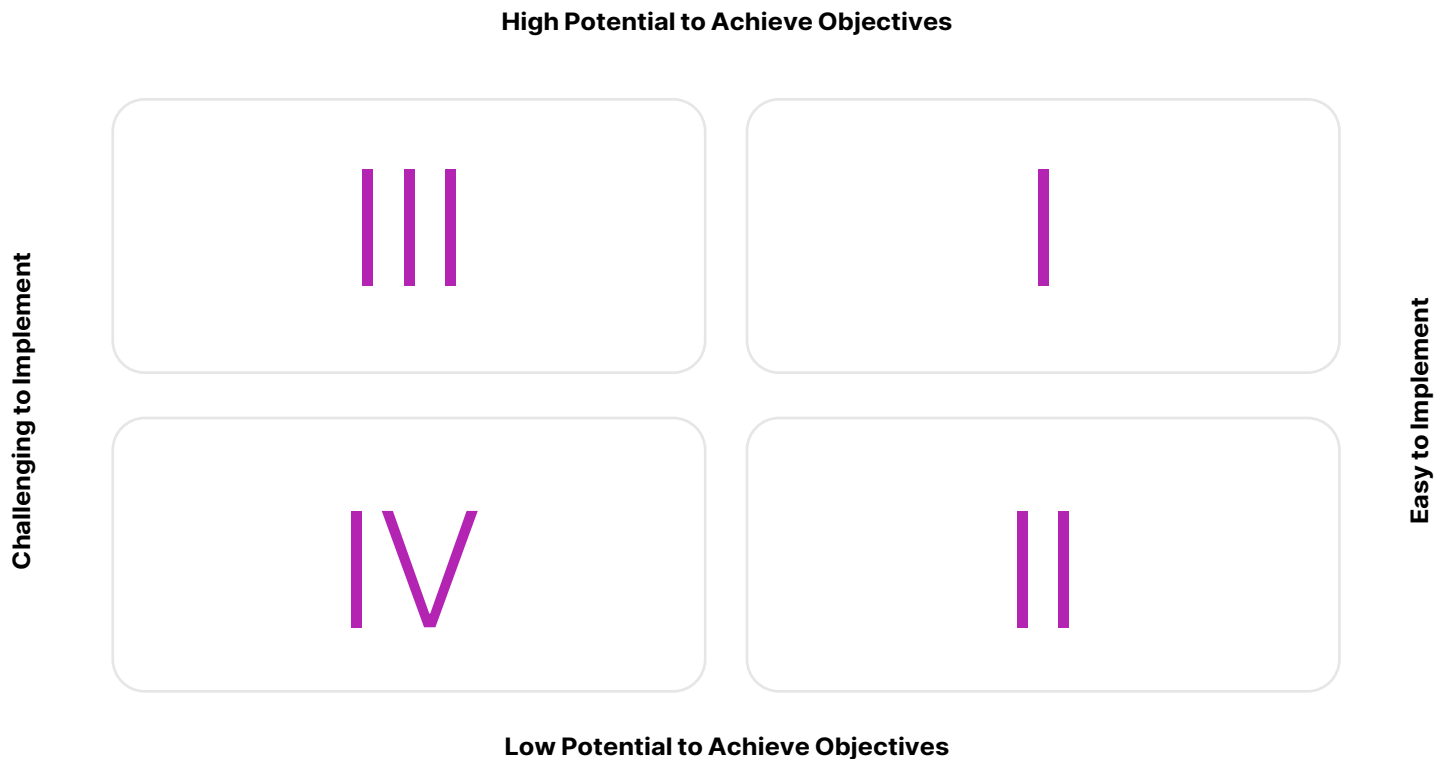
Build awareness with tourism stakeholders and visitors on responsibility to long-term sustainability.

Build or enhance tourism assets across all communities in PEI that improve quality of life for residents.

PILLARS & INITIATIVES

The 5-Year Tourism Strategy for PEI is broken down into key pillars and key initiatives. Many have been prioritized by the Steering Committee while others have been developed (and not prioritized) based on the conversations had during that workshop. Those initiatives that were considered were assessed against criteria to assess how likely and quickly the initiative could support achieving the 5-Year Tourism Strategy for PEI and the ease which this initiative could be implemented.

- I.** High potential to achieve objectives and relatively easy to implement: Immediate opportunities
- II.** Lower potential to achieve objectives but easy to implement: For future assessment in the event the opportunity improves on support for objectives
- III.** High potential to achieve objectives but will take longer to implement: Opportunities for medium term development
- IV.** Lower potential to achieve objectives and hard to implement: Opportunities to assess when some conditions improve



ACHIEVEMENT POTENTIAL AND IMPLEMENTATION OF INITIATIVES (NORMALIZED)

- I.** High potential to achieve objectives and relatively easy to implement: Immediate opportunities
- II.** Lower potential to achieve objectives but easy to implement: For future assessment in the event the opportunity improves on support for objectives
- III.** High potential to achieve objectives but will take longer to implement: Opportunities for medium term development
- IV.** Lower potential to achieve objectives and hard to implement: Opportunities to assess when some conditions improve

High Potential to Achieve Objectives



Low Potential to Achieve Objectives

PILLARS & INITIATIVES

The 5-Year Tourism Strategy for PEI is broken down into **4 pillars** listed under two key objectives. Each pillar contains initiatives that PEI should undertake over the next years and months to achieve its ambitions. Tactical action, timelines, roles and responsibilities, and measurable outcomes for each initiative are outlined in the following sections.

In order to achieve the objectives of the strategy to both optimize PEI's tourism enabling environment and increase total annual tourism revenue, the strategy recognizes four key pillars to support those objectives:

1. Optimizing the tourism enabling environment
2. Marketing and sales
3. Improving tourism products, experiences and infrastructure
4. Improving tourism capacity

Within each of these four pillars are a number of initiatives that support the objectives.

Each of the initiatives is populated with an action plan, timelines and expected leads to kick start the initiative, but these may shift as conditions or further analysis suggests a different approach.

These initiatives have been derived through research, executive interviews, surveys, a workshop to help categorize the importance of these initiatives and prioritize their ability to achieve the objectives as well as discussion and feedback with the Steering Committee. Important points to note about these initiatives:

Each of these initiatives merits fuller scrutiny with the Implementation Committee (the first priority) and may require additional research to validate. Some may be dropped because they are no longer deemed important or valued

Some initiatives are ongoing from the previous strategy

Some initiatives will take additional financial and human resources to execute which may not be forthcoming

Some initiatives may take longer than five years to execute

Some initiatives may be dropped or replaced by more important initiatives as conditions for tourism on PEI may change

In each case, the strategy recommends that the Implementation Committee account for the progress or deletion of the key initiatives.

PILLARS & INITIATIVES

The 5-Year Tourism Strategy for PEI is broken down into **4 pillars** listed under two key priorities. Each pillar contains initiatives that PEI should undertake over the next years and months to achieve its ambitions. Potential tactical actions, timelines, roles and responsibilities, and measurable outcomes for each initiative are outlined in the following sections.

OBJECTIVES

PILLARS

KEY INITIATIVES

	1. OPTIMIZE TOURISM ENABLING ENVIRONMENT	2. INCREASE TOTAL ANNUAL TOURISM REVENUE (INCREASE YIELD IN SUMMER AND VOLUME IN SHOULDER SEASONS AND WINTER)		
	①	②	③	④
PILLARS	OPTIMIZING TOURISM ENABLING ENVIRONMENT	MARKETING AND SALES	IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE	IMPROVING TOURISM CAPACITY
KEY INITIATIVES	<ul style="list-style-type: none"> A. Create a Tourism Strategy Implementation Committee B. Address the tourism mindset in PEI C. Address the tourism funding shortfall through an alternative model D. Develop tourism opportunities in all regions of PEI E. Encourage communities across PEI to prioritize tourism F. Focus on attracting entrepreneurs and investors to tourism G. Continue to address workforce challenges H. Continue to support efforts to increase air access to PEI and address intermodal transportation challenges I. Engage the myriad of economic development and business support agencies across PEI for tourism J. Support for non-profit organizations to develop tourism products and experiences 	<ul style="list-style-type: none"> A. Continue to take a highly targeted approach to stimulating visitation to PEI on a season-by-season basis leveraging key assets (events, meetings/conventions, sport, and niche leisure experiences) B. Support attracting cruise in spring and summer C. Market to higher-yield and more reliable source markets during peak travel months D. Offer packaged niche tourism experiences to make it easier to buy PEI during the winter and shoulder seasons E. Continue to market and support traditional assets to the family market during peak travel months F. Optimize target audiences and source market segments based on seasons G. Fully activate PEI's partnership opportunity with the NHL 	<ul style="list-style-type: none"> A. Develop an asset inventory and gap analysis for PEI's tourism assets: <ul style="list-style-type: none"> i. Leisure and event assets by region/ summer ii. Shoulder and winter leisure assets iii. Meetings and convention facility assets iv. Sports tourism assets Determine gaps for investment and entrepreneurs B. Develop culinary tourism C. Develop wellness tourism D. Develop Indigenous tourism E. Identify underutilized and ageing infrastructure to support tourism development F. Encourage the development of higher-yield products and experiential tourism 	<ul style="list-style-type: none"> A. Improve customer experience and service delivery B. Continue to develop market research to help inform strategy and decisions C. Help PEI's operators become more resilient to impacts of climate change and pandemics D. Build the experience development capacity of Island operators E. Help operators optimize pricing for capacity and demand

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT



PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative A: Create a Tourism Implementation Committee

Description/Rationale

- This 5-year tourism strategy for PEI outlines a variety of objectives and initiatives designed to improve the overall state of tourism in PEI. However, these objectives are not passively achieved. Rather, dedicated actions from a variety of public and private sector stakeholders is required to make progress towards a more successful and sustainable tourism industry.
- A Tourism Implementation Committee will champion the tourism strategy, collaborate with different organizations who are best suited to help achieve objectives, and consistently track progress on initiatives.
- This committee should be composed of a variety of tourism stakeholders that represent government as well as tourism business and private sector, all while considering impact on residents.
- Communication remains an important area for continual improvement.

Timeframe Guidelines

- Ongoing
- Short-term (1 to 2 years)

Roles

- Tourism PEI (co-lead)
- TIAPEI (co-lead)
- Industry partners (support)

Potential Tactical Actions

- Carry forward the existing Tourism Strategy Implementation Committee to continue its role of overseeing and providing advice on the implementation of PEI's tourism strategy.
- Hold quarterly meetings to determine key initiatives to execute, partners to collaborate with on initiatives, and evaluate progress towards objectives.
- Manage a detailed Tourism Strategy Tracker to document progress on each initiative.
- Continue reporting Implementation Progress publicly (via the Tourism PEI website). Consider additional methods to communicate and inform the industry on implementation progress (e.g., quarterly newsletter).
- Communicate the strategy to help support improved stakeholder collaboration.

Outcomes

- The creation and execution of a Tourism Implementation Committee who work towards the implementation of strategy initiatives and evaluate progress towards the objectives in this 5-year tourism strategy.
- Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative B: Address the tourism mindset in PEI

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> With a mindset of how tourism has traditionally been defined in PEI (summer, leisure, Charlottetown, Cavendish, golf and now culinary), there may be little room for the tourism industry, communities, governments to consider what tourism could be. There is a need to challenge the 100-year narrative of what PEI is as a tourism destination and the traditional tourism season, products, experiences and even accommodations. With a mindset that does not reflect the realities or possibilities of tourism, PEI is limited in its tourism growth potential. This is reflected in an overall lack of growth of product, seasons, experiences, hours and days of operation, customer service, and more. The current mindset limits the vision of potential investors and entrepreneurs to invest in the industry, while also limiting communities to invest in their own tourism. Many Islanders view tourism as an industry that requires hefty effort as well as financial and personal investment. However, they may not recognize all the benefits tourism can generate including tourism generated tax revenue to support other community operations (e.g., healthcare, infrastructure, education, transportation, etc.), supporting small businesses, beautifying a region, celebrating the Island's culture, additional amenities in region due to tourism activities, and more. 	<ul style="list-style-type: none"> Developmental (2 to 5 years)
	<h3>Roles</h3>
<h3>Potential Tactical Actions</h3> <ul style="list-style-type: none"> Create a captivating campaign to educate residents on the impact and importance of tourism. Post signage across the Island communicating the revenue tourism produces for the province and what that funding supports (e.g., hospitals, education, transportation, etc.) Leverage models from other provinces that have faced similar challenges (Travel Alberta and its Travel Works campaign) Share success stories of tourism businesses in PEI, not only from a personal success perspective, but how these businesses have benefitted the community by supplying jobs and creating community spaces. Share success stories of tourism happening in all seasons. 	<h3>Outcomes</h3> <ul style="list-style-type: none"> A unified community mindset that understands tourism is a tool for positive change and that they have the power to harness year-round visitation that can not only bring success to the tourism businesses but elevate the entire Island and benefit the greater community. Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative C: Address the tourism funding shortfall through an alternative funding model

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● PEI's tourism industry is underfunded relative to its contribution to GDP and as a result, may under-perform relative to its potential. ● Most other provinces, cities and resorts have alternative funding models in place to support the government contribution to tourism. ● There is no evidence that destinations that have implemented an alternative funding have deterred visitors. ● To diversify into, and attract new major markets to PEI (e.g., higher-yield visitors), Tourism PEI needs more investment to support major marketing and development campaigns as well as additional programs for meetings/conventions, sports tourism, product/experience, and regional development. ● Potential sources of increased funding could include developing a formula agreement with the Province to return a percentage of taxes generated by tourism spending to tourism and/or a province wide levy which, like other provinces and cities, could be levied on points of entry, paid accommodations, and attractions. ● For detailed analysis and case studies, see Resource Guide 7. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
<h3 data-bbox="139 1171 375 1192">Potential Tactical Actions</h3> <ul style="list-style-type: none"> ● Research alternative funding models from across Canada and around the world to determine one which might fit best for PEI. ● Strike an alternative funding model task force to identify and advocate for an alternative funding model ● Complete detailed research to inform the funding model decision (e.g., case studies, community surveys, etc.). Study additional revenue streams such as a tourism levy to fund strategic initiatives. ● Collaborate with other branches of government/politicians to ensure a smooth adoption of the funding model. 	<h3 data-bbox="1227 1171 1325 1192">Outcomes</h3> <ul style="list-style-type: none"> ● The successful implementation of an alternative funding model that is supported by industry and government and creates additional funding to champion tourism marketing and management efforts. ● Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative D: Develop tourism opportunities in all regions of PEI

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● PEI's tourism industry has traditionally developed in the Charlottetown and Cavendish regions with more recent additions in golf resorts. There is potential for tourism growth beyond the core regions of PEI which can support the dispersion of visitors across the Island and showcase the many unique areas that make PEI so special. ● Different areas of PEI have differing tourism product and experience strengths – from beaches to outdoor recreation to culture, food and more. Tourism clustering can help visitors understand the product offerings across the Island that most align with their needs and interests. Fostering the development of competitive tourism clusters is seen as an important element in achieving both regional and seasonal dispersion of visitor economic activity in PEI. ● Development of tourism products in regions should be fostered through capacity building, especially to those regions/ destinations that are in the earlier stages of tourism product/experience development. These experiences need to be created and then marketed. ● Islanders are at the heart of informing visitor exploration once on-Island. If Islanders are incentivized to explore more of the Island, they can encourage the visitation of different places. Information about events and activities should also be regularly shared with locals so they can be on top of tourism happenings on the Island. ● Visitor dispersion could be promoted through on-island marketing to encourage visitors to explore far and wide and in all seasons. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> ● RTAs and DMOs (lead) ● TIAPEI (support) ● Tourism PEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Engage government and private sector stakeholders to facilitate additional development of regions, products and experiences. ● Create an asset inventory of tourism assets and determine asset gaps. Study the potential for regional tourism cluster development. Build upon existing CMA-PEI inventory of museums and heritage sites. ● Provide educational and financial programs to grow capacity of tourism businesses in more rural areas. ● Work with government and industry stakeholders to determine where there are product clusters and create visitor itineraries around these areas including a product cluster map to provide a visual understanding for visitors of what to expect in different areas around the Island. 	<ul style="list-style-type: none"> ● Dispersion of visitors across the Island to increase the overall visitor volume and spending while showcasing the many unique opportunities of the Island. ● Provide reasons to return to the Island to visit parts of the Island they may have missed on their first trip. ● Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative E: Encourage communities across PEI to prioritize tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> Many communities across PEI don't fully understand that they are in, or could be in, the business of tourism despite many of these communities are owning tourism assets. These assets range from local parks, to fishing wharfs to museums to even restaurants. Tourism entrepreneurs and investors often look to community support to develop tourism, or are guided by those catalyst assets in each community which could be optimized to encourage further enhancement or investment. Frequently, poor resident sentiment for tourism is cited as why communities don't engage more in tourism, but if leadership prioritized tourism, resident sentiment may be improved. An all-Island approach to tourism, where all regions are a part of the marketing and planning of the destination, can support a cohesive and seamless experience for the visitor – where they can explore different areas and feel the sense of a consistent and authentic PEI brand. Collaboration also allows for greater capacity to embark on destination development activities, with more resources (human and financial) power to execute strategic initiatives. 	<ul style="list-style-type: none"> Long-term (4 years plus)
<h3>Potential Tactical Actions</h3> <ul style="list-style-type: none"> Communicate the importance of tourism to communities through regional partners. Identify where they hold catalyst assets that may be underutilized and where they could improve and identify potential investment, or potential gaps that could be filled by communities, volunteer organizations or entrepreneurs. Continue to monitor resident sentiment for tourism to understand current perceptions of tourism from the community and the desire to develop tourism. RTAs and DMOs, along with TIAPEI can advocate for tourism and share the importance of tourism in the community through events, education, and community forums. 	<h3>Roles</h3> <ul style="list-style-type: none"> RTAs and DMOs (lead) Tourism PEI (support) TIAPEI (support) <h3>Outcomes</h3> <ul style="list-style-type: none"> Communities recognize tourism's power to accelerate its objectives and is prioritized as a means for community and economic development. More tourism investment happens in communities because tourism is valued and supported. Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative F: Focus on attracting entrepreneurs and investors to tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● PEI's tourism industry is dominated by small and medium sized business run by entrepreneurs and investors. ● For more product development and enhancement to occur, especially in priority experiences, PEI must attract more entrepreneurs and investors into tourism; and not only tourism investors but those kinds of investors that are fully engaged in the tourism communities. ● A holistic approach to entrepreneurship could create an environment that encourages innovative ideas and fresh investment. Existing resources for entrepreneurs could begin to have an increased emphasis on tourism. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● RTAs (co-lead) ● TIAPEI (co-lead)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Develop a meaningful program to support and communicate to prospective investors the tourism investment opportunity on the Island. This program should be ongoing and offer support to businesses and investors along the investment and development life cycle. ● Identify the myriad of resources on the Island to support investors and entrepreneurs and help them better understand gaps in tourism assets and resources available to tourism entrepreneurs. ● Identify entrepreneurs and investors that are a good fit for tourism, aligning with the Island's values and asset gaps. ● Evaluate the readiness for investment of the Island and specific communities, considering public and private sector influences. ● Support more private sector operators through tourism entrepreneurship. ● Attract and foster strong levels of tourism investment and entrepreneurship. ● Work with LaunchPad PEI. 	<ul style="list-style-type: none"> ● PEI is recognized as a top destination for tourism investment and entrepreneurs. ● Innovative tourism ideas flourish on the Island and are financially supported. ● More products/experiences are developed and enhanced to support higher-yield visitors. ● Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative G: Continue to address workforce challenges

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> Labour shortages and the maintenance of the workforce is a limiting factor in extending the PEI tourism season, as businesses cannot stay open without human capacity to support operations. During the COVID-19 pandemic much of the tourism workforce turned to different industries. Legal restrictions can make it more difficult to welcome labour from other countries and university students are limited to summer employment. Challenges in attracting and retaining employees due to a lack of available workforce housing also exist. Employees with wider availability must be attracted to successfully extend the Tourism PEI tourism season and support year-round tourism activity. The employees that are working in the industry are often overworked in the summer season due to severely limited staff, and as a result can have a reduced desire for seasonal extension. 	<ul style="list-style-type: none"> Ongoing Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> TIAPEI (co-lead) Tourism Workforce Development Committee (co-lead) Tourism PEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> Partner with local universities to educate students on the importance of tourism and provide employment opportunities to students year-round. Explore study and stay retention program to incentivize recent graduates to enter tourism workforce. Address key needs of tourism employees such as affordable housing or access to transportation. Utilize a co-op approach for some tourism businesses where employees can work for different businesses on different days, allowing owners to get days off during the summer and for businesses to have longer operational hours. Launch a Work in PEI campaign to highlight why tourism workers should consider a job in PEI. Carry forward the implementation of the TIAPEI-led Tourism Workforce Action Plan (3-Year Plan). In 2026, following the end of the strategic period associated with the current Workforce Action Plan, develop the next evolution of PEI's tourism workforce development strategy. This should include a review of the implementation of the current Plan, what worked, what didn't, and what efforts need to be continued. 	<ul style="list-style-type: none"> There is a flourishing tourism workforce year-round with adequate support for employee needs (such as housing, transportation, etc.). Tourism businesses can stay open with longer daily hours and owners and employees do not get burnt out because there is enough support. Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative H: Continue to support efforts to increase air access to PEI and address intermodal transportation challenges

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● A basic need for visitors to experience the full breadth of PEI is accessing the destination and moving about the Island. Increased air access has the potential to attract markets further from PEI which typically indicates a longer stay and higher spend. Further, increased air access could help drive shoulder season and winter travel. ● Lack of Island-wide public transit system limits the ability for visitors to make a more meaningful economic impact across PEI and reduces unique accessible experiences for a large segment of travellers. ● The free movement around the Island by higher-yield long-haul visitors is dependent upon transportation offerings on the Island including an Island-wide public transportation. Without this, visitors and their dollars are confined to areas nearby their accommodation or entry point. ● Flight costs, timing of flights, and the low number of direct flight destinations contribute to the air access challenge. ● Momentum needs to continue to build on existing initiatives and new initiatives explored to accommodate the everchanging transportation and tourism landscape. ● For more information on the transportation offerings in PEI and the importance of addressing associated challenges, see Resource Guide 5. 	<ul style="list-style-type: none"> ● Ongoing ● Developmental (2 to 5 years)
	<h3 data-bbox="1179 655 1524 695">Roles</h3> <ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● Charlottetown Airport (co-lead) ● Northumberland Ferries Ltd. (co-lead) ● Confederation Bridge (co-lead) ● Ground Transportation Committee (co-lead)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Continue momentum of PEI based ridesharing app Kari as well as Turo to encourage exploration on the Island. ● Protect new air routes from Ontario and Alberta. ● Support efforts to increase air access to key target outbound destinations. Protect new air routes and support the expansion of air service connectivity in the region. ● Continue to advocate for the federal government to increase investment and improve the PEI ferry service. ● Support the continual improvement of PEI's ground transportation [e.g., public transportation, active transportation, and private-sector-led (rentals)], as this is foundational to realizing PEI's tourism potential. Efforts should support both the movement of visitors and labour. ● Continue to advocate for a reduction in fees associated with accessing PEI via the Confederation Bridge and Wood Islands Ferry Terminal, which is putting PEI at a disadvantage. 	<ul style="list-style-type: none"> ● Visitors can easily enter the Island (via air, ferry, or bridge) with reasonably priced choices from multiple domestic and international source markets. ● Visitors have access to all regions of PEI through reliable inter-modal transportation and car rentals. ● Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative I: Engage the myriad of economic development and business support agencies across PEI for tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> Economic development institutions and business support agencies are present in PEI, but few have a focus, nor complete understanding of tourism development. Without adequate funding and support, it is difficult for tourism businesses to be created or further developed. Without a strong relationship between economic development institutions and regional organizations (RTAs and DMOs), it is tough for regional organizations to connect local businesses with potential funding opportunities. 	<ul style="list-style-type: none"> Developmental (2 to 5 years)
	<h3>Roles</h3> <ul style="list-style-type: none"> TIAPEI (co-lead) Tourism PEI (co-lead) RTAs and DMOs (co-lead) ACOA (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> Leverage existing economic development and business support agencies in PEI by emphasizing the importance of tourism and identifying partnerships between these agencies and tourism businesses. Foster a dynamic relationship between economic development organizations and RTAs and DMOs so these regional organizations can help connect tourism businesses with economic opportunities. 	<ul style="list-style-type: none"> Economic development agencies are knowledgeable about tourism industry potential and can recognize and support prospective tourism investors. Tourism businesses in PEI have sufficient funding and support from existing economic development and business support agencies. PEI has a tourism environment where businesses can flourish and thrive, incorporating innovative ideas that are supported by existing agencies. Improve the enabling environment for tourism in PEI.

PILLAR 1: OPTIMIZING TOURISM ENABLING ENVIRONMENT

Initiative J: Support for non-profit organizations to develop tourism products and experiences

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Non-profit organizations can be the life blood of communities. In many instances they create local and regional events, are volunteers to staff local museums and community centres. ● In many places across Canada, non-profits are a significant part of community-based tourism and add a considerable amount to the local and authentic nature of a tourism experience that many would define PEI by. ● Currently, non-profit organizations in PEI require more support to bolster community tourism events and activities. ● Project funding may not need to be exclusively for nonprofits, but non-profits could be eligible for general funding alongside private sector participation. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> ● RTAs and DMOs (lead) ● ACOA (support) ● Tourism PEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Utilize the Executive Directors of RTAs and DMOs to disperse funds to organizations that supports tourism, regardless of business status. 	<ul style="list-style-type: none"> ● Non-profits are recognized as a cornerstone of tourism development and can gain adequate funding to support community tourism events and opportunities. ● Improve the enabling environment for tourism in PEI.

PILLAR 2: MARKETING AND SALES



PILLAR 2: MARKETING AND SALES

Initiative A: Continue to take a highly targeted approach to stimulating visitation to PEI on a season-by-season basis, leveraging key assets and channels (events, meetings/conventions, sport, and niche leisure experiences)

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● PEI has been traditionally viewed as a summer destination by its industry, operators, and stakeholders. ● PEI offers exceptional summer experiences, beaches, camping, BBQs, lobster suppers, golf and water sports. However, the focus on summer limits the total number of visitors, as demand quickly outweighs supply. ● Meetings/conventions, events, and sports tourism offer an opportunity to bring prospective visitors to PEI during winter and shoulder seasons. If experiences and tourism assets such as restaurants or retail were open for these visitors, their impact could be even higher. Meetings and Conventions PEI could help attract these visitors. ● There is an additional opportunity to convince meeting/convention, event, or sports tourism visitors to extend their trip pre or post event for leisure purposes, or to return in a different season to explore the Island. ● Niche leisure markets offer another approach to attract visitors in the shoulder and winter seasons. ● For an in-depth look at seasonality, see Resource Guide 1. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● Meetings and Conventions PEI, Golf PEI, Food Island Partnership, and RTAs/DMOs (co-lead) ● Sports tourism organizations (Charlottetown and Summerside) (co-lead)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Build upon the current PEI Seasonal Expansion Strategy. ● Create a calendar that identifies which tourism market and channel is most likely to attract visitors and identify key markets and channels to support that action (i.e. leisure, niche markets, meetings/conventions, sports, etc.) ● Develop marketing campaigns for markets that have the highest potential in all seasons – highly targeted and informed marketing campaigns will continue to be of strategic importance to PEI’s tourism industry and will drive four-season visitation, and further support the PEI Seasonal Expansion Strategy. ● Establish a marketing-focused working group with a mandate to increase marketing alignment and collaboration between and among PEI’s tourism marketing-focus organizations. 	<ul style="list-style-type: none"> ● PEI is a strategically planned year-round destination that attracts volume visitors beyond typical leisure markets using the channels that hold the highest potential to attract visitors by month and season. ● Generate higher yield/revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative A part 1: Continue to take a highly targeted approach to stimulating visitation to PEI on a season-by-season basis, leveraging: Leisure and Events

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> Developing and packaging tourism products and experiences in the shoulder seasons may differ from those in the winter. The shoulder season could act as an extension of the summer season with leisure tourism beginning earlier in the spring and extending it into the fall. Some variations may be required to incent visitors to come during this period and could include pricing incentives, packaging incentives, add ons, etc. Festivals and events can further support the extension of the season. The winter season may require additional product development to support it and similarly to the shoulder season, additional leisure incentives may be required leveraging pricing, packaging, add ons, etc. For both winter and shoulder seasons, the leisure market segments are likely drive markets/ weekend getaways. In some instances, there may be some weeks/months where leisure tourism or events may not be the best tool to attract visitors and may require yielding to sports tourism or meetings/conventions. 	<ul style="list-style-type: none"> Ongoing Short-term (1 to 2 years)
	Roles
<p>Potential Tactical Actions</p> <ul style="list-style-type: none"> Identify the product, channels, and markets that hold the highest propensity to visit during the shoulder and winter season and include them in the surgical marketing calendar. Develop an asset inventory of leisure experiences/assets, niche experiences, specialty target audiences (e.g., girls' getaways, Valentines Day weekend, mother's day, etc.) that remain open to support winter/shoulder season tourism. Take innovative approaches to facilitating the development of competitive packages for events, other experiences, and tourism assets. 	<ul style="list-style-type: none"> Tourism PEI (lead) Meetings and Conventions PEI, Golf PEI, Food Island Partnership, and RTAs/DMOs (support) Sports tourism organizations (Charlottetown and Summerside) (support)
	Outcomes
	<ul style="list-style-type: none"> Opportunity to leverage leisure tourism where it holds the highest potential to attract visitors during the winter and shoulder season. Yield to other channels and markets where the leisure market is less efficient. Generate higher yield/revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative A part 2: Continue to take a highly targeted approach to stimulating visitation to PEI on a season-by-season basis, leveraging: Meetings and Conventions

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> Meetings and Conventions PEI does a great job with limited resources – putting PEI on the meetings and conventions map Despite this, the organization lacks some tools including an incentive fund to support the attraction of meetings and conventions in the winter and shoulder seasons. These are tools that PEI's competitors are actively using to compete against PEI. While there are many supporting assets open year-round in PEI (e.g., convention centre, hotel meeting facilities, etc.), meetings thrive in PEI when there is a sense of vibrancy in the cities/regions in which the meeting or conventions is being hosted. Attracting meetings and conventions during the winter and shoulder season, especially with incentive funds, can be an efficient way to fill hotel rooms and support tourism assets in the winter and shoulder season Meetings and Conventions PEI is currently undergoing a strategic plan which will help the organization determine its own strategy and action plan. 	<ul style="list-style-type: none"> Ongoing Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> Meetings and Conventions PEI (lead) Food Island Partnership (support) RTAs/DMOs (support) ACOA (support) Tourism PEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> Support the recommendations from the Meetings and Conventions PEI Strategy and Action Plan. 	<ul style="list-style-type: none"> A competitive meetings and convention sector for PEI that is sufficiently funded to be competitive Increase occupancy rates in the winter and shoulder season and supports volume with high-yield business events in the summer. Generate higher-yield and higher- revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative A part 3: Continue to take a highly targeted approach to stimulating visitation to PEI on a season-by-season basis, leveraging: Sports Tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Sports tourism is a priority for the City of Charlottetown and for the City of Summerside. ● There have been some significant recent wins with curling, baseball, and hockey ● Sports tourism is much less sensitive to some weather impacts, seasonality, and depending on the sport, can attract visitation year-round. ● The new NHL partnership will be a significant boost to positioning PEI as a place of sports tourism and in particular, hockey in all forms and at all levels. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> ● RTAs/DMOs (co-lead) ● Sports tourism organizations (Charlottetown and Summerside) (co-lead) ● Sports PEI (support) ● Tourism PEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Develop a sports tourism strategy for PEI. ● Identify those sports, events, tournaments, etc., that occur in the winter or shoulder seasons to drive visitation and increased hotel occupancy. ● Continue to activate the NHL partnership to help determine new events that can be supported. ● Identify sport tourism assets that require infrastructure improvements to host sport tourism events. 	<ul style="list-style-type: none"> ● A well-honed sports tourism strategy that supports increased occupancy rate and supports restaurants and experiences. ● Generate higher-yield and higher/revenue in the summer and increased volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative B: Support attracting cruise in spring and summer

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Cruise is predominantly a fall-based activity (i.e., September and October) for PEI. It has grown significantly in popularity with Charlottetown quickly becoming a destination of choice on the Atlantic Canada and Quebec cruise circuits. ● There is potential to grow cruise in the spring as well as the summer market (where high-demand hotel rooms are not required), but where spending from day trips has the potential to grow. Growth should be managed to ensure it's sustainable and likely not from huge ships. ● More cruise passengers in the spring would provide a much-needed vibrancy to Charlottetown. Collaborative opportunities exist with partners including in the St. Lawrence seaway who are also working on expanding winter cruising. ● Opportunities for cruise visitors should focus on expanding experiences for this market and showcasing other parts of PEI to avoid tourism congestion in Charlottetown which has the potential to negatively impact both the visitor and resident experience. ● Cruise is rapidly recovering from the pandemic and research suggests it has a high direct impact (approximately \$16M direct spending) on PEI and will continue to be a high-growth segment for PEI's tourism industry. ● For more information on the cruise industry in PEI, see Resource Guide 4. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> ● Port Charlottetown (lead) ● Tourism PEI (support) ● TIAPEI (support) ● ACOA (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Create a cruise dispersion plan to identify key opportunities and experiences accessible for cruise visitors to spread visitors and their impact across the Island. ● Partner with St. Lawrence cruise channels to encourage and market winter cruising. ● Continue to support Port Charlottetown with port improvements (e.g., clean shoreside power enhancements, etc.), Port and Founders Food Hall activations/programming, and intelligence that will inform the strategic growth of PEI's cruise sector will be important to carry forward in the new strategy. 	<ul style="list-style-type: none"> ● Cruise tourism is expanded in PEI into the spring and summer seasons with a strong economic impact on the Island. ● Generate higher-yield higher-revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative C: Market to higher yield and more reliable source markets during peak travel months

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● PEI's foundational tourism assets have been well-developed over many decades to appeal to peak travel period visitors. ● Like many competitive destinations, PEI's summer visitation has been dominated by short-haul drive source markets. For PEI, this includes Atlantic Canada and then moving outward to the Quebec and Ontario drive and air markets, and finally to Northeastern US, and international markets. ● The Majority of PEI's tourism revenues are generated by this combination of source market segments. ● While the Maritimes are the dominant source market for PEI, this market tends to be fickle, quick to cancel when the weather outlook is not favourable and have lower spending than longer-haul source markets. ● While traditional peak travel period marketing can be mass, seasonal and winter marketing needs to be more targeted to fill the gaps. ● For many weeks during the peak travel period, demand for tourism assets, accommodations in PEI exceeds supply. ● There is significant opportunity to prioritize the longer-haul, air, and Northeastern US markets during peak travel months which could result in a longer stay, higher-yield and more reliable peak travel period visitor. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	<h3>Roles</h3>
<h3>Potential Tactical Actions</h3> <ul style="list-style-type: none"> ● Shift PEI's main destination marketing campaign to predominantly focus on longer-haul and air markets in Ontario/ Quebec, Alberta and the North Eastern US. Backfill from the Maritime market during some weeks of occupancy weakness using tactical marketing campaign approaches. ● Empower the regions to support marketing in New Brunswick and Nova Scotia as well as where there are digital niche opportunities regardless of geography. ● Capitalize on Tourism PEI research of visitors to determine regions where there are higher-yield visitors (including high-yield families) and tailor marketing efforts to those visitors. 	<ul style="list-style-type: none"> ● Tourism PEI (lead) ● RTAs and DMOs (support) ● Golf PEI (support) <h3>Outcomes</h3> <ul style="list-style-type: none"> ● A focus on higher-yield more reliable longer-haul visitor will increase total tourism revenue during the peak travel months. ● Generate higher-yield, higher-revenue in the peak travel period and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative D: Offer packaged niche tourism experiences to make it easier to buy PEI during the winter and shoulder seasons

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Traditional mass marketing may not be as effective during the harder to sell winter and shoulder seasons. ● Many destinations resort to packaging their experiences against a multitude of themes: romance, winter getaway, culinary, wellness, girlfriends getaways, events, etc. ● While this is not new for PEI's tourism industry, the utilization of themes and special packaging developed more frequently and marketed to the Maritime market (and beyond) could accelerate tourism revenues and growth. ● For packaging to be successful during the shoulder and winter seasons, operators must dedicate time and resources to support these efforts. This needs to confront the issue of seasonality issues in PEI during the shoulder and winter seasons where operators do not want to stay open because there are no visitors, but visitors don't want to go to PEI during this time because there are no businesses open. ● Technology can be utilized to make it easier to package opportunities. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> ● Tourism businesses (co-lead) ● RTAs and DMOs (co-lead) ● Tourism PEI (support) ● TIAPEI (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Develop a platform for visitors to easily gain access to packaging options in one convenient location. ● Market niche tourism experiences utilizing targeted online tactics to reach desired markets. ● Facilitate an environment that curates the development of competitive packages during the winter and shoulder seasons. 	<ul style="list-style-type: none"> ● Visitation in the shoulder and winter seasons grows due to niche tourism experiences. ● Tourism packages support tourism businesses and increases the business period of operation. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative E: Continue to market and support traditional assets to the family market during peak travel months shoulder seasons

<p>Description/Rationale</p>	<p>Timeframe Guidelines</p>
<ul style="list-style-type: none"> ● PEI's tourism industry was born and bread on the summer/beach and Anne of Green Gables markets. ● These markets have served PEI's tourism industry very well, in particular the family market that comes for entertainment, family friendly products, and golf. ● There is additional potential to focus on a high-yield family market within the broader summer family market which PEI has owned for decades. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
<p>Potential Tactical Actions</p>	<p>Roles</p>
<ul style="list-style-type: none"> ● Leverage Tourism PEI visitor research to determine regions where there are higher-yield family markets, and to better understand the activities and experiences that attract them to travel and to travel in particular to PEI, and tailor marketing efforts to attract those visitors. ● Develop itineraries that share classic adventures with families but also take them to less-traveled areas of the Island such as CMA-PEI themed itineraries for museums and heritage sites. 	<p>Outcomes</p>
	<ul style="list-style-type: none"> ● The family market remains firmly rooted in PEI's summer tourism season and higher-yield family visitors are attracted. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative F: Optimize target audiences and source market segments based on seasons

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● The further a visitor travels to visit PEI, the more likely they are to stay longer, spend more, and not cancel their trip. Tapping into additional source and niche markets could generate a higher-yield visitor. ● Visitors from the Maritimes have more flexibility to go to PEI for a short amount of time, cancel if there is poor weather or other conflicts, and spend less money on products or experiences. Source markets from further afoot destinations could provide more consistent revenue. ● While the family market will remain a base of the PEI tourism industry, growing the Millennial, Gen Z and activity markets could help PEI to remain a major tourism player in eastern Canada/North America for years to come. ● The attraction of different marketing could be divided between the regions and Tourism PEI, with the regions focusing on nearby Maritime and Atlantic Canada markets who are already familiar with PEI. Tourism PEI can focus its efforts and resources on other source markets and attract high-yield visitors. 	<ul style="list-style-type: none"> ● Short-term (1 to 2 years)
<p>Potential Tactical Actions</p> <ul style="list-style-type: none"> ● Create a calendar that breaks down which tourism is viable each month of the year and identify key markets to target to support that action (i.e. leisure, niche markets, meetings/conventions, sports, etc.). ● Establish a marketing-focused working group with a mandate to increase marketing alignment and collaboration between and among PEI’s tourism marketing-focused organizations. ● Develop campaigns for markets that have the highest potential in all seasons – highly targeted and informed marketing campaigns will continue to be of strategic importance to PEI’s tourism industry and its drive to become a four-season destination. This will also support the PEI Seasonal Expansion Strategy 	<p>Roles</p> <ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● RTAs and DMOs (co-lead) ● Meetings and Conventions PEI (co-lead) ● Golf PEI (co-lead) ● Food Island Partnership (co-lead) <p>Outcomes</p> <ul style="list-style-type: none"> ● Tourism PEI can tactically identify which markets could have the greatest impact on PEI’s economy during different seasons and attracts those visitors. ● Generate higher-yield and higher-revenue in the summer and more volume in the winter.

PILLAR 2: MARKETING AND SALES

Initiative G: Fully activate PEI's partnership opportunity with the NHL

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Tourism PEI and its partners recently invested in a significant partnership with the National Hockey League (NHL). ● This is a first of its kind partnership for the NHL which provided PEI's tourism industry multiple touch points to activate the sponsorship and support PEI's brand. ● The NHL partnership provides PEI's tourism industry with significant reach into key Canadian markets (Ontario and Quebec), as well as the North Eastern US markets. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> ● Tourism PEI (lead) ● ACOA (support) ● RTAs and DMOs (support) ● TIAPEI (support) ● Meetings and Conventions PEI (support) ● Golf PEI (support) ● Food Island Partnership (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Fully activate PEI's tourism brand with the NHL within the parameters of the partnership agreement. ● Leverage the partnership across all channels—leisure, major events, meetings and conventions, and sports tourism. ● Consider developing leisure, sports tourism, and meetings/conventions packages around the partnership. ● Activate in source markets including Toronto, Ottawa, Montreal, Alberta and in New York/New Jersey, Boston and Pennsylvania 	<ul style="list-style-type: none"> ● PEI capitalizes on the new NHL partnerships and gains further recognition as <i>the</i> official travel destination of the NHL. ● Generate higher yield/revenue in the summer and more volume in the winter.

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE



PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative A: Develop asset inventory and gap analysis for PEI's tourism assets

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● It is unclear how many tourism assets PEI has to support leisure, meetings/conventions, sports tourism, and event markets and how many it may require to continue to be competitive. ● In the summer when higher-yield source markets and segments are sought after, it is unclear if PEI has sufficient products, experiences and assets to attract high-yield visitors to spend more tourism dollars on the Island. ● In the winter/shoulder seasons, it is also unclear if PEI has sufficient assets to reflect leisure, sport, meeting/conventions, and events tourism – or which assets are open for business. ● Finally, PEI holds a number of assets that could serve as catalyst assets to attract more entrepreneurs and investors, if they were more fully utilized. ● An asset inventory of all tourism products and experiences for all channels across all seasons and regions may be required to help determine gaps that need to be filled by entrepreneurs, investors, and communities. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> ● RTAs and DMOs (lead)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> ● Complete a tourism asset inventory and subsequent gap analysis to identify existing assets as well as gaps that are needed to support the industry. ● Identify potential investors and funding opportunities to help fill tourism asset gaps. ● Collaborate with existing catalyst assets such as national and provincial parks to extend their tourism season and support seasonal expansion. 	<ul style="list-style-type: none"> ● A comprehensive assessment of existing tourism assets and a clear understanding of tourism asset gaps for investment. ● Catalyst assets that remain open longer will support a longer visitor season. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative B: Develop culinary tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Culinary offerings have always been an important element of tourism in PEI. However, this has not traditionally been prioritized as a driver of destination choice, rather as a supplementary factor for visitors that add to the enjoyment of the destination and the experience. ● With increasing popularity of niche market travel and the unique selling proposition as Canada’s Food Island, including name recognition for products such as seafood and potatoes around the world, PEI is well-positioned to attract culinary travellers. ● Canada Food Island brand ties with fishing, farming, and Island authenticity. ● Culinary offerings are the fabric of PEI and are wrapped into so many components of the Island. A culinary tourism strategy could consider the current state of culinary tourism and envision what the future of this segment could look like including expanded culinary experiences, events, and marketing. ● PEI holds a unique competitive advantage in culinary/food tourism and could that support its challenges with seasonality. ● For statistics on culinary tourism and its applicability in PEI, see Resource Guide 2. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years)
<h3>Potential Tactical Actions</h3> <ul style="list-style-type: none"> ● Canada Food Island Partnership to develop a culinary tourism strategy in partnership with provincial tourism organizations. Consider partnership with Culinary Tourism Alliance for tourism strategy development. ● Identify culinary tourism products for development including agritourism programs, farm-to-table restaurants and the utilization of local food products, food itineraries, and more. ● Share the story of food in PEI year-round with products being harvested throughout the calendar year. ● Relaunch and maximize the use of the Island Gift Card Program. ● Identify opportunities to build capacity within the culinary sector through training programs, mentorship, guest speakers, etc. 	<h3>Roles</h3> <ul style="list-style-type: none"> ● Food Island Partnership (lead) ● Tourism PEI (support) ● ACOA (support) ● TIAPEI (support) ● Culinary Tourism Alliance (potential support) <h3>Outcomes</h3> <ul style="list-style-type: none"> ● A culinary strategy is developed that explores the current state of culinary tourism in PEI and how the industry could grow year-round tourism. ● Food is an undeniable pillar of PEI and visitors from around the globe travel to PEI to take part in its culinary experiences. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative C: Develop wellness tourism

Description/Rationale	Timeframe Guidelines	
<ul style="list-style-type: none"> Wellness is ever-growing in popularity globally. PEI already has wellness assets including the Island Walk and outdoor recreation opportunities, a spa, farm-to-table dining experiences, and a Nordic spa to connect visitors to wellness experiences, and more. PEI is uniquely positioned to own this space in Canada beyond just a spa perspective, and include the Island life -- slower pace, oceans, local food, and fresh air – all critical components of wellness. To appeal to this market and continue to improve and develop the wellness tourism offerings in the province, a wellness tourism strategy can be developed. Wellness must be defined for PEI and a collection of current and potential wellness offerings outlined. In alignment with PEI’s Seasonal Expansion Strategy, the Province continues to invest in improvements and expansions to trail-based offerings like Brookvale Provincial Park and scenic lookouts which include interactive tourism lookouts that shares the region’s history. Other investments include trail maintenance and grooming, the engagement of golf courses and resorts in the non-peak season trail offerings with some RTAs have also engaging with private golf courses to support off-season trail use (e.g., Glasgow Hills and Tourism Cavendish Beach). Research continues to support tourism positioning and development surrounding restorative travel and wellness in a broad sense. The positioning of wellness tourism is outlined in PEI’s Seasonal Expansion Strategy and is an important element of positioning PEI in the non-peak seasons. For statistics on wellness tourism and its applicability in PEI, see Resource Guide 3. 	<ul style="list-style-type: none"> Developmental (2 to 5 years) 	
	Roles	
<th data-bbox="94 1377 1154 1421">Potential Tactical Actions</th> <td data-bbox="1180 806 1529 1050"> <ul style="list-style-type: none"> Wellness tourism businesses (lead) Tourism PEI (support) TIAPEI (support) ACOA (support) RTAs and DMOs (support) </td>	Potential Tactical Actions	<ul style="list-style-type: none"> Wellness tourism businesses (lead) Tourism PEI (support) TIAPEI (support) ACOA (support) RTAs and DMOs (support)
<ul style="list-style-type: none"> Develop an inventory of existing wellness offerings and identify existing gaps. Market PEI as a wellness destination, not only for its brick-and-mortar assets (such as its Nordic Spa) but also for its open spaces and outdoor activities, and the opportunity to holistically (re)connect with loved ones while traveling within a peaceful destination. Position PEI as a strong wellness destination. Develop and enhance Island walking and biking trails and continue to work with, and support, the new non-profit established to lead the Island Walk product and encourage wellness activities along the Island Walk. 	Outcomes	
	<ul style="list-style-type: none"> PEI has the product, experiences, and brand to support a competitive position as a top wellness destination. PEI will be known for its fresh air, local food, ability to reconnect with loved ones, and other wellness activities. Generate higher-yield, higher-revenue in the summer and more volume in the winter. 	

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative D: Develop Indigenous tourism

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● The growing global demand for Indigenous tourism is aligned with the growing demand for Indigenous tourism in PEI. ● While a few experiences currently exist for Indigenous tourism in PEI, capacity building for the Indigenous people on the Island must be a priority to ensure the development of Indigenous-led tourism offerings, with full ownership over their experiences and their story. This support may include an outline of funding opportunities, business visioning sessions to guide Indigenous Islanders in creating unique and successful businesses, and general support for operators who want to bring an idea to the tourism market. ● Indigenous tourism operators must be continually included and engaged in broader tourism conversations on the Island to realize mutual benefit from collaborative and inclusive tourism planning. ● Indigenous Tourism Association of PEI (ITAPEI) is a new non-profit and volunteer Indigenous tourism business association with a mandate to help assist in the growth of authentic Indigenous tourism experiences in PEI. ITAPEI is best positioned to lead Indigenous tourism growth and development in PEI. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
<p>Potential Tactical Actions</p> <ul style="list-style-type: none"> ● Establish capacity building programs for Indigenous operators and entrepreneurs to educate Indigenous people on how to build up Indigenous-led tourism experiences. ● Identify areas of opportunity for Indigenous tourism including experiences, traditional restaurants, accommodations, resorts, and more. ● Share best practices in Indigenous tourism development with ITAPEI and Indigenous Islanders to sustainably grow offerings. 	<p>Roles</p> <ul style="list-style-type: none"> ● ITAPEI (co-lead) ● Indigenous people of PEI (co-lead) ● Lennox Island (support) ● Abegweit First Nations (support) ● Tourism PEI (support) ● TIAPEI (support) ● ACOA (support)
	<p>Outcomes</p> <ul style="list-style-type: none"> ● Indigenous tourism operators in PEI have support to create successful tourism experiences that are Indigenous-led and are sought after. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative E: Identify underutilized and ageing infrastructure to support tourism development

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● Outdated infrastructure for sports, meetings/conventions, and events puts PEI behind in supporting these tourism markets, which could result in the loss of both smaller and major events and conferences to peer destinations. ● The right facilities are needed to support events across the Island year-round. For some spaces such as performing arts and cultural spaces, the high expense to rent existing infrastructure makes it difficult to utilize. Rather than building entirely new facilities, a reducing associated costs for community use could be considered. ● Many parks at the federal and provincial level currently do not stay open year-round and therefore limit their potential for tourism activities. Crown assets including national parks play an important part in activating tourism products and experiences during the non-peak seasons. ● Consideration could be given for establishing capital incentive programs aimed at improving infrastructure which exists for most other main industries in PEI besides tourism. ● Infrastructure relating to hotels, restaurants, meeting/conventions, events, sports, and transportation could benefit from investment for improvements. ● For examples of underutilized and ageing infrastructure in PEI, see Resource Guide 6. 	<ul style="list-style-type: none"> ● Long-term (4 years plus)
<p>Potential Tactical Actions</p> <ul style="list-style-type: none"> ● Incentivize arts venues to offer lower rental prices to local groups to offer additional shows and events while supporting local businesses and artists. ● Identify spaces that are currently ageing or underutilized and determine the best way to move forward with those spaces (e.g., modify the spaces for current tourism needs, create new spaces, adapt pricing schemes of spaces, etc.). ● Invest in public-private partnerships to transform crown assets into year-round products and experiences. 	<p>Roles</p> <ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● TIAPEI (co-lead) ● Meetings and Conventions PEI (support) ● ACOA (support) ● RTAs and DMOs (support) ● Parks Canada (support) <p>Outcomes</p> <ul style="list-style-type: none"> ● Tourism spaces in PEI are periodically updated to match changing industry needs and these spaces are affordable to utilize. ● Appropriate funding allows capital improvements to be completed on tourism business infrastructure. ● Generate higher-yield, higher-revenue in the summer and more volume in the winter.

PILLAR 3: IMPROVING TOURISM PRODUCTS, EXPERIENCES AND INFRASTRUCTURE

Initiative F: Encourage the development of higher-yield products and experiential tourism.

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> The summer season in PEI currently faces the issue of higher-demand than supply for tourism assets such as accommodations. In order to capitalize on the popular summer-season in PEI that sparkles with sunny weather, pristine beaches, and ample activities, the attraction of higher-yield markets is needed. However, there is high competition for the attraction of these markets with many competitor destinations offering higher-end products and experiences. To better attract higher-yield visitors, PEI must develop high-yield products and experiences where a higher-cost is accompanied with higher perceived value. These higher-yield products and experiences could include boutique hotels and resorts, customizable experiences, luxury retail offerings, and culinary offerings such as fine dining or offer hyper-local menus. The products and experiences developed should align with the core desires of the determined higher-yield market. For example, if urban couples are identified as a higher-yield visitors who visit PEI to escape from the hustle and bustle of the big city, wellness opportunities and private adventures to less densely populated areas of the Island could be developed and marketed. 	<ul style="list-style-type: none"> Developmental (2 to 5 years)
	Roles
	<ul style="list-style-type: none"> Tourism PEI (co-lead) TIAPEI (co-lead) ACOA (co-lead) Tourism businesses (support) RTAs and DMOs (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> Determine which markets could hold the most potential to be higher-yield and the key travel motivators for these markets. Evaluate the tourism asset types in PEI and engage tourism businesses, investors, and entrepreneurs to elevate the tourism product. Seek funding for tourism businesses to complete capital improvements to elevate current tourism assets. 	<ul style="list-style-type: none"> High priced experiences have high perceived value, Higher-yield markets are attracted to PEI and there is subsequent rising tourism revenues in the summer due to higher-yield products and experiences, while also encouraging travel during the winter and shoulder seasons. Generate higher-yield, higher-revenue in the summer and more volume in the winter.



PILLAR 4:
IMPROVING TOURISM
CAPACITY

PILLAR 4: IMPROVING TOURISM CAPACITY

Initiative A: Improve customer experience and service delivery

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> ● If PEI wants to attract a high-yield visitor, the value (including the product itself and the service at the product) needs to match the price of offerings or there will be brand malalignment. ● Extensive training in customer service, experience development, business skills, marketing, etc. could be offered to improve service standards and create alignment on Island-wide standards for service. ● Business operation hours are not always consistent and can be short. To attract tomorrow's traveler, there must be things to do and places to eat in the evenings, shoulder season, and the winter. ● Efforts to increase levels of service can build on best practices from other destinations, potentially for industry partners to take experience courses for potential funding. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years)
	Roles
<p>Potential Tactical Actions</p> <ul style="list-style-type: none"> ● Develop extensive training modules on a variety of business and service delivery topics (such as customer service, experience development, business skills, marketing, etc.) which can be offered to businesses. Participants in the training program could receive special recognition or other perks. ● Incorporate a standardized service delivery education into TIAPEI industry trainings; consider a new model customized to PEI's unique tourism culture, opportunities, and challenges. ● To encourage participation, consider tying attendance at training events to memberships in TIAPEI or even funding opportunities. ● Explore the disconnect between value and service to determine what key topics should be covered during trainings. ● Offer specialized one-on-one trainings with tourism businesses from specialists to address issues with customer service and service delivery within a particular business. 	<ul style="list-style-type: none"> ● TIAPEI (lead) ● Tourism PEI (support) ● RTAs and DMOs (support) ● Business development organizations (support) ● ACOA (support)
	Outcomes
	<ul style="list-style-type: none"> ● Improved service delivery and visitor experience resulting in a high perceived value for visitors. ● Higher confidence from businesses and employees on the product that they offer. ● Greater alignment across PEI on customer service standards. ● Improve the enabling environment for tourism in PEI.

PILLAR 4: IMPROVING TOURISM CAPACITY

Initiative B: Continue to develop market research to help inform strategy and decisions

Description/Rationale	Timeframe Guidelines		
<ul style="list-style-type: none"> ● Data and insights hold immense power for tourism planning and management. The continued development and execution of market research can help PEI in determining key statistics such as visitor volume and spending, top visitor markets, and visitor and resident perceptions of tourism. ● Additionally, this market research can monitor how strategy implementation is translating to the tourism market and inform strategy and decisions. A tourism strategy is a living document and requires flexibility to help pivot as needed to reach key destination objectives. ● Research can have a wider impact on the destination when applied at the more local level. RTAs and DMOs can be encouraged to review market research and apply it at the local level. Collaborative market research execution could help to gather information at the local level and inform tourism decisions at all levels. ● There will be an ongoing need for primary and partnership research (e.g. Atlantic Canada Agreement on Tourism (ACAT) or Destination Canada supported) to inform the planning and tactics of PEI's tourism stakeholders. 	<ul style="list-style-type: none"> ● Ongoing ● Short-term (1 to 2 years) 		
<th>Potential Tactical Actions</th> <td data-bbox="1182 657 1528 699"> <th>Roles</th> </td>	Potential Tactical Actions	<th>Roles</th>	Roles
<ul style="list-style-type: none"> ● Continue to complete market research to gather information on key markets and visitor data. ● Engage RTAs and DMOs to execute research such as visitor surveys at the local level. ● Utilize market research to evaluate the progress of strategy initiatives and adapt strategy as needed to reach key objectives. ● Collect and share market and resident sentiment research. ● Conduct a review and to continue to modernize PEI's tourism performance measurement framework and reporting of KPIs. 	<ul style="list-style-type: none"> ● Tourism PEI (lead) ● RTAs and DMOs (support). ● Research partners (support) 		
	<th>Outcomes</th>	Outcomes	
	<ul style="list-style-type: none"> ● Market research continues to be a pillar for Tourism PEI and completed research informs ongoing strategic decisions for tourism in PEI. ● PEI's tourism strategy, embedded in research has a significant impact on realizing the Island's full tourism potential. ● Improve the enabling environment for tourism in PEI. 		

PILLAR 4: IMPROVING TOURISM CAPACITY

Initiative C: Help PEI's operators become more resilient to impacts of climate change and pandemics

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> The tourism industry, while a key industry in PEI and globally, can be volatile when certain unforeseen circumstances occur such as weather events that are climate change related, and pandemics. Tourism industry disruption is inevitable, but tourism operators can become more resilient to these impacts by adequately preparing for the potential of these disruptions and implementing actions to help reduce these their impacts. Action 13 of the Province's Climate Adaptation Plan – "Partner with Industry to Respond to Climate Risks of Farm, Fishing and Tourism Sectors" identifies the need to partner with industry for a climate risk assessment of PEI's tourism industry to identify priority risks and provide guidance on shifting practices and products that can help or withstand impacts of the shifting climate. 	<ul style="list-style-type: none"> Ongoing Short-term (1 to 2 years)
	Roles
	<ul style="list-style-type: none"> TIAPEI (lead) Tourism PEI (support) Tourism businesses (support)
Potential Tactical Actions	Outcomes
<ul style="list-style-type: none"> Evaluate the Safe Haven program and determine if the program should continue and/or evolve. Funding model, return on investment of public funds, and delivery model should be key considerations in the review. Collaborate with tourism funding sources such as business development funds and federal and provincial government programs to access grants and funding for tourism to complete capital improvements to better withstand the impacts of climate-related events such as major hurricanes and storms. Complete a Tourism Industry Climate Risk Assessment. Create a Mitigation Strategy to reduce the impact of future pandemics and other disrupting events on the Island's tourism industry. 	<ul style="list-style-type: none"> A tourism industry that is better prepared to withstand the negative impacts that unforeseen events have on tourism. The tourism industry can effectively communicate with visitors the state of tourism in PEI after these events occur in the destination. Improve the enabling environment for tourism in PEI.

PILLAR 4: IMPROVING TOURISM CAPACITY

Initiative D: Build the experience development capacity of Island operators

Description/Rationale	Timeframe Guidelines		
<ul style="list-style-type: none"> ● Experience development is needed to push any destination forward and not remain a static product. ● Island operators are at the heart of everyday tourism in PEI, hearing from visitors and intimately seeing and understanding what works and what does not work in tourism. ● While these operators may see and understand these challenges, it may be difficult to understand how to develop new experiences. 	<ul style="list-style-type: none"> ● Developmental (2 to 5 years) 		
	Roles		
<th data-bbox="94 957 1154 997">Potential Tactical Actions</th> <td data-bbox="1180 957 1528 1369"> <th data-bbox="1180 957 1528 997">Outcomes</th> </td>	Potential Tactical Actions	<th data-bbox="1180 957 1528 997">Outcomes</th>	Outcomes
<ul style="list-style-type: none"> ● Create an experience development program that outlines the challenges, steps, and outcomes for successful experience development. This may be incorporated in TIAPEI trainings. ● Offer mentorship programs to share best practices between businesses that are well-versed in experience development and those in the beginning steps or stages. ● Address funding challenges related to experience development and provide Island operators with resources to support experience development. ● Continue to support the work of the Atlantic Canada Best Practice Mission Work Group and provide support to operators who participate in missions that align with the tourism strategy. 	<ul style="list-style-type: none"> ● Tourism PEI (co-lead) ● TIAPEI (co-lead) ● ACOA (support) ● Tourism businesses (support) <ul style="list-style-type: none"> ● Island operators are leaders in experience development and implement innovative tourism experiences across the Island. ● Increased revenues and visitation are realized through new year-round experiences. ● Improve the enabling environment for tourism in PEI. 		

PILLAR 4: IMPROVING TOURISM CAPACITY

Initiative E: Help operators optimize pricing for capacity and demand

Description/Rationale	Timeframe Guidelines
<ul style="list-style-type: none"> • Static pricing for tourism businesses are utilized to change prices based on popular seasons and special events but are limited in shifting prices based on smaller moves in demand or in situations when demand changes at a rapid rate. • Using dynamic pricing, businesses can respond to live capacity and demand needs. For example, if there is a boost of bookings from Japan overnight when no one in PEI is watching booking details, there could be a missed opportunity to raise prices. Dynamic pricing strategies allow for more continuous overview of pricing. • For operators to effectively optimize pricing, training support will be needed to educate them on how to optimize pricing and what that could look like for each specific business. Pricing will differ based on individual business parameters such as the type of business, size of business, etc. • With PEI's tourism industry being comprised of many small businesses, and as an industry that is experiencing a considerable level of business ownership transition or succession, dynamic pricing and financial management practices more broadly, is a significant opportunity for tourism industry progress in PEI. 	<ul style="list-style-type: none"> • Developmental (2 to 5 years)
Potential Tactical Actions	Roles
<ul style="list-style-type: none"> • Develop a dynamic pricing/price optimization fact sheet that can be easily dispersed and understood by operators and includes easy-to-follow steps for price optimization. • Offer one-on-one guidance through a business development organization to establish best practices for price optimization with specific operators. This allows a customizable session focused specifically on individual operator's business. • Training and speaking opportunities should be offered for financial management education. 	<ul style="list-style-type: none"> • TIAPEI (lead) • Tourism PEI (support) • ACOA (support) • Business development organizations (support)
	Outcomes
	<ul style="list-style-type: none"> • Operators in PEI can effectively price their offerings to keep a competitive edge and change cost based on capacity and demand. • This will result in increased revenues during peak seasons and support creation of more demand during the winter and shoulder seasons. • Improve the enabling environment for tourism in PEI,

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