

A woman in a striped sweater is standing in a field of tall grass, holding a camera up to her eye as if taking a photograph. In the background, there is a large, rustic stone building with a steep, dark roof. The sky is blue with some light clouds, and the ocean is visible in the distance.

PEI'S 2021 TOURISM SEASON
TACTICAL ACTION PLAN:
PREPARING FOR A NEW NORMAL
(WHILE MAXIMIZING RETURNS)
2 MARCH 2021

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The information and data found in this report are current as of the date of submission to TPEI and subject to change given market forces and external variables.

2 March 2021.



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PEI 2021 TOURISM SEASON OVERVIEW

Context & purpose
Approach

PURPOSE OF THIS DOCUMENT

COVID-19 continues to have a significant impact on the travel and tourism industry.

Despite the knowledge gained by governments and medical professionals on how to control and treat the virus, along with the rollout of a much-anticipated COVID-19 vaccine, it will take time before life returns to some semblance of 'normal'.

Will this return to 'normal' occur prior to the 2021 tourism season? Likely not. While the vaccine rollout has begun, it is slow, and will require a large percentage of the population to be inoculated for herd immunity to take effect. Until this happens, everyone must continue to be cautious with their social interactions, locals and visitors alike. How long the transition to a new 'normal' will take is yet unknown.

PEI's institutions and residents will need to dig into their entrepreneurial, survivalist roots, given the likely outcome for the 2021 tourism season, to weather yet another potentially challenging tourism season.

Destinations like PEI should continue to take a short-term approach to tourism planning. Specifically, for PEI, this entails development and execution of a tactical action plan focused on critical initiatives that will support tourism basics while maximizing 2021 tourism season returns for operators, and most importantly, prepare the Island for the next 'normal'.

This document provides a strategic framework and tactical action plan to support PEI's tourism industry for the 2021 tourism season. As the tourism industry prepares for upcoming tourism season, and additional information about the future impact of the virus emerges along with plans for managing it, the TPEI leadership along with industry stakeholders, will focus on a longer-term tourism strategy required to guide PEI's tourism future for 2022 and beyond.

We used a similar three-step approach to the previous short-term tourism strategic framework and action plans to inform PEI's tourism strategic framework and tactical action plan for the 2021 tourism season.

STRATEGIC FRAMEWORK & TACTICAL ACTION PLAN APPROACH PER "SPRINT"



PEI 2021 TOURISM SEASON TACTICAL ACTION PLAN

Strategic Framework

Tactical Actions

Roadmap

An assessment of current and historical data, along with stakeholder input on challenges and opportunities confirms PEI’s ultimate objective to support tourism basics while preparing for a new ‘normal’ and maximizing returns.

2021 TOURISM SEASON STRATEGIC FRAMEWORK & TACTICAL ACTIONS

01

STRENGTHEN TOURISM BASICS

Actions:

1. Provide continuous and clear stakeholder communications
2. Research potential markets for the 2021 tourism season
3. Compile, review and share guidelines, guidance, policies, programs, funding opportunities and other types of support
4. Work with lead tourism HR agencies to explore HR assistance programs
5. Revamp tourism technology to better meet operator and visitor needs
6. Support expansion of Canada’s Food Island gift card program

Critical success factor



Game-changer

OUTCOME

Strengthen tourism leadership by focusing on the basics that support a destination’s tourism industry.

02

OPTIMIZE 2021 TOURISM RETURNS

Actions:

1. Develop events and experiences related to adventure & sports tourism
2. Develop events and experiences related to golf and ‘after-golf’
3. Maximize opportunities for local and regional Meetings and Conventions
4. Develop events and experiences using existing infrastructure such as trails and event grounds as located throughout the province
5. Plan and execute local tourism campaign(s)
6. Plan and execute Atlantic bubble tourism campaign(s) focusing on key market segments like families, couples, etc.
7. Prepare domestic campaign(s) focusing on key market segments like families, couples, etc.
8. Launch tourism health and safety certification program

Critical success factor



Game-changer

OUTCOME

Optimize 2021 revenues through marketing programs and fresh and safe tourism experiences.

03

PREPARE FOR NEXT ‘NORMAL’ AS PART OF RECOVERY

Actions:

1. Identify and prioritize tourism infrastructure requiring improvement and build business case for funding and implementation
2. Create programs to support/fund small tourism businesses
3. Create plan to support air service recovery
4. Explore additional tourism industry funding models
5. Develop long- term tourism strategy

Game-changer & critical success factor



OUTCOME

Prepare for tourism’s next ‘normal’ by focusing on aspects of the tourism industry that are likely to impact future of PEI’s tourism.



Tactical actions are further detailed in following section.

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 01: PROVIDE CONTINUOUS AND CLEAR STAKEHOLDER COMMUNICATIONS

Description

- Those destinations that have fared the best during the COVID-19 pandemic are those that prioritized timely communications with clear messaging to all stakeholders.
- This was demonstrated in late 2020 when PEI's tourism industry benefited from TPEI's leadership in providing its tourism stakeholders with several opportunities, through various channels, to communicate its focus and its action for Winter/Spring 2020/2021, providing direction to all PEI tourism stakeholders.
- More of the same needs to be done to continue to prioritize continuous and clear communications with PEI's tourism stakeholders. Of importance would be the communication of PEI's approved 2021 tourism season strategy, as well as actions and status of those actions that PEI is taking to implement the strategy.
- Additionally, to improve the continuous communication that TPEI has already begun to put in place, it will engage stakeholders to get a better understanding of their communications needs - i.e., how, what, where and how often.
- It is expected that one of the outcomes of the stakeholder engagement will be the need to create additional simple networking opportunities for PEI's tourism stakeholders.
- This tactical action is one of the key factors to the success of PEI's ability to enable tourism industry optimization for 2021 and recovery beyond that.

Timeframe/Trigger

- Immediately
- Ongoing

Responsible

- TPEI (lead)
- TIAPEI (support)
- RTAs/DMOs (support)
- Parks Canada (support)

Outcomes

- Plurality of PEI tourism stakeholders satisfied with TPEI communications
- Constant communication stream of PEI tourism actions and achievements
- Stakeholder alignment in the execution of action items

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 02: RESEARCH POTENTIAL MARKETS FOR THE 2021 TOURISM SEASON

Description

- There is no doubt that travel consumer behaviour has shifted due to the COVID-19 pandemic. This is true for local, domestic, regional and international travellers.
- Given PEI's focus on the primary target markets of local tourists as well as Atlantic bubble travellers, it ought to gain a thorough understanding of local and Atlantic bubble visitor needs, including the types of places and activities they are seeking, how they intend to learn more about potential destinations, their booking behaviours and newly developed interests as a result of COVID-19, and so forth.
- PEI should continue to conduct research using existing available tools (e.g., Environics, sentiment research, and other) to gain a better understanding of potential visitors, and their behaviours and desires to ensure PEI can offer experiences they are seeking and attract them through effective marketing campaigns.
- While traditional market research such as surveys can be used, they are both time-consuming and costly. In depth digital listening can be a cost-effective way to provide actionable data quickly.
- While assessing local tourist needs, it would behoove PEI to understand local sentiment towards tourists to address the negative sentiment they may be feeling towards potential tourists.
- Finally, TPEI should make insights accessible to all tourism and non-tourism partners to evaluate opportunities and make the right business decisions.

Timeframe/Trigger

- Immediately
- Ongoing

Responsible

- TPEI (lead)
- RTAs/DMOs (support)

Outcomes

- Market intelligence on "new" potential markets
- Research accessibility to tourism stakeholders

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 03: COMPILE, REVIEW AND SHARE GUIDELINES, GUIDANCE, POLICIES, PROGRAMS, FUNDING OPPORTUNITIES AND OTHER TYPES OF SUPPORT

Description

- The speed at which local, domestic and international guidelines, guidance, policies, programs, funding opportunities and other types of support that have been developed and rolled out due to COVID-19 makes it difficult for tourism industry stakeholders to keep track of, particularly as they focus on remaining afloat.
- Tourism leadership in PEI has an opportunity and a duty to compile guidelines, guidance, policies, programs, funding opportunities and other types of support that may impact PEI's tourism stakeholders, review them to determine those that may immediately support operators versus those that may have a more long-term impact, and synthesize and disseminate them concisely to all operators through a variety of means.
- In addition to sharing these findings with operators across the Island, tourism leadership needs to assess these regulations, policies, programs, funding opportunities and other types of support to identify those that can be improved or streamlined to support small and medium size tourism businesses, e.g., around tourism season startup funding, wage subsidy programs, and entry restrictions to identified target markets.
- This tactical action further suggests that PEI's tourism leadership will continue to have discussions with relevant governmental organizations regarding assistance and relief programs, and report policy and regulation review findings and recommendation to lobby for decisions that support PEI tourism businesses in the short and long-term.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TPEI (lead)

Outcomes

- Review and dissemination of guidelines, guidance, policies, programs, funding opportunities and other types of support

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 04: WORK WITH LEAD TOURISM HR AGENCIES TO EXPLORE HR ASSISTANCE PROGRAMS

Description

- Research has indicated that one of the biggest pain points for PEI entrepreneurs revolves around resources to support identification and retention of staff that may have been lost due to the COVID-19 pandemic.
- While this initiative is typically led by national and provincial tourism HR agencies like TIAPEI and Skills PEI, together with these organizations, Tourism PEI should explore ways to support the enhancement or development of HR assistance programs, specifically, but not limited to:
 - Wage subsidies
 - Training

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TIAPEI (lead)
- Skills PEI (lead)
- TPEI (support)

Outcomes

- Support tourism HR agencies to identify and develop/enhance tourism HR opportunities

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 05: REVAMP TOURISM TECHNOLOGY TO BETTER MEET OPERATOR AND VISITOR NEEDS

Description

- In today's day and age, and accelerated by the COVID-19 pandemic, travellers of all ages and interests are spending more time online to learn about new destinations, decide where to go, plan their trips, connect with locals and more.
- For this tactical action, PEI's tourism leadership should:
 - Develop a corporate website where operators could easily access information such as most recent strategies, funding programs, research, marketing and product development information, as well as other relevant information for the industry;
 - Update the visitor website to make it more modern, user-friendly and focused on providing inspiring trip ideas for the visitors; and,
 - Complete the review of Tourism PEI's Integrated Tourism Solution system and consider whether Tourism PEI should continue offering booking service. With so many online travel agents (OTAs) offering these services, most destinations have chosen to link to the operator's choice of booking partners as opposed to managing their own system.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TPEI (lead)
- RTAs/DMOs (support)

Outcomes

- Development of a corporate website
- Updated visitor website
- TPEI booking service provision recommendation

01. STRENGTHEN TOURISM BASICS

TACTICAL ACTION 06: SUPPORT EXPANSION OF CANADA'S FOOD ISLAND GIFT CARD PROGRAM

Description

- PEI's Canada's Food Island gift card program was a major success at getting local consumers to various, primarily food and accommodation providers.
- There is a potential to build on this program by exploring opportunities to leverage the gift cards to include additional merchants and to further drive demand including off-island.
- PEI's tourism leadership and the Food Island Partnership should work together to produce additional, innovative ways to expand the program to involve additional tourism operators, and encourage locals and regional visitors, and eventually those coming from further away to experience more of PEI, disperse across the Island, stay longer, and ultimately spend more.
- Part of the expansion of the gift card program may be by exploring ways to make it available for purchase online.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TPEI (lead)
- Food Island Partnership (lead)

Outcomes

- Increased purchases of gift cards
- Increased number of tourism related merchants
- Support buy-local

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 01: DEVELOP EVENTS AND EXPERIENCES RELATED TO ADVENTURE & SPORTS TOURISM

Description

- As a result of the COVID-19 pandemic, many travellers are re-focusing their travel experiences on those that can be done in the great outdoors, allowing for social distancing. They are looking for a hint of adventure in these experiences, whether it be soft adventure like cycling a trail with the family, or more physically intense experiences like windsurfing (i.e., hard adventure).
- In conducting an exercise to identify lead opportunities for the 2021 tourism season with key industry stakeholders from across the Island, outdoor adventure and sports tourism was identified as near-market ready tourism opportunities that could be prepared and promoted for the 2021 tourism season.
- These types of activities are identified as those that would have a significant impact in achieving 2021 tourism season objectives, namely optimizing tourism business returns, and that are easier to implement because much of the required enabling environment (e.g., regulations, designations) and infrastructure (e.g., trails such as the Confederation Trail, paths and stadia) are already in place, and in some cases, have been piloted to comply with potentially lingering COVID-19 requirements.
- This initiative is focused on identifying and inventorying adventure and sports tourism opportunities on the Island and seek to develop itineraries and packages that include supporting attractions such as food and beverage, accommodation and shopping - a major opportunity that should be considered is cycling due to the availability of existing infrastructure and potential inclusion of small groups/family members.
- This initiative may also include identifying and attracting an existing, or creating a new, adventure or sports-related event to the Island.

Timeframe/Trigger

- Immediately
- Ongoing

Responsible

- TPEI (lead)
- Sports associations/clubs (support)
- Parks Canada (support)

Outcomes

- Development/enhancement of adventure/sports tourism opportunity plans, including target markets, supporting itineraries, roadmap, etc.

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 02: DEVELOP EVENTS AND EXPERIENCES RELATED TO GOLF AND 'AFTER-GOLF'

Description

- Like the prioritization of adventure and sports tourism, golf and 'after-golf' activities were identified by tourism stakeholders as near-market ready product and experience that can drive tourism returns for the immediate 2021 tourism season.
- Golf in PEI during 2020 demonstrated its potential as a COVID-19 compliant, social distancing activity that attracts higher-yield visitors willing to spend several days in a particular location.
- PEI should continue to tap into this market combining golf-packages with more traditional tourism products and experiences like food and beverage, accommodation, attractions and shopping.
- A major challenge for PEI is that much of its golf capacity (with new COVID-19 regulations) was used mainly by golfers from the Island.
- More needs to be done to understand the potential and the need of golfers from the Atlantic region and develop golf and 'after-golf' experiences tailored for them.

Timeframe/Trigger

- Immediately
- Ongoing

Responsible

- TPEI (lead)
- Golf PEI (support)

Outcomes

- Development/enhancement of a PEI golf and 'after-golf' opportunity plan, including target markets, supporting itineraries, roadmap, etc.

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 03: MAXIMIZE OPPORTUNITIES FOR LOCAL AND REGIONAL MEETINGS AND CONVENTIONS

Description

- Research indicates that there seems to be a small but growing interest among local and Atlantic Bubble organizations to host meetings and events in PEI when it is possible for them to do so again.
- For this initiative, TPEI should continue to explore ways to provide the resources to maximize opportunities for local and regional meetings and conventions in PEI. This includes:
 - Ensuring continue alignment with Meetings and Conventions PEI
 - Supporting the coordination of regular regional government meetings to identify and act on opportunities
 - Identifying funding opportunities to support maximizing meetings and conventions in PEI

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- Meetings and Conventions PEI (lead)
- TPEI (support)

Outcomes

- Support maximizing opportunities for local and regional meetings and conventions

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 04: DEVELOP EVENTS AND EXPERIENCES USING EXISTING INFRASTRUCTURE SUCH AS TRAILS AND EVENT GROUNDS AS LOCATED THROUGHOUT THE PROVINCE

Description

- Many stakeholders surveyed as part of the development of the strategic framework and tactical action plan expressed a need to create new events that comply with social distancing guidelines.
- They also expressed a need to leverage event grounds as located throughout the province to create more and unique experiences that would drive more visitors across and to the Island.
- As part of this initiative, PEI's tourism leadership should work together with organizers to identify potential opportunities for it to drive more users.
- This exercise should be conducted with evidence collected in tactical action 1.2: Research Potential Markets for the 2021 Tourism Season to understand visitor potential and needs.
- Supported with the data, PEI's tourism leadership, in collaboration with event grounds organizers and other stakeholders should identify potential opportunities to drive visitors to the attraction (e.g., drive-in movies, car shows, etc.), along with supporting initiatives (i.e., infrastructure updates, re-positioning, marketing, etc.).
- PEI's tourism leadership should develop a business plan that outlines the opportunity, the need it fulfills, the funding required along with the roadmap for its implementation.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TPEI (lead)
- Event grounds (lead)

Outcomes

- Development of activities and events

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 05: PLAN AND EXECUTE LOCAL TOURISM CAMPAIGN(S)

Description

- In the 2021 tourism season, local tourism is critical factor for the survival of tourism businesses across PEI.
- This initiative is focused on creating appropriate marketing campaigns targeting PEI residents to experience all that the Island has to offer for the 2021 tourism season. Based on feedback from key tourism stakeholders during the discovery phase of the strategic framework and tactical action plan, there are several market-ready or near-market ready opportunities that can be enhanced to promote tourism on the Island, whether it be adventure and sports tourism, or golf and 'after-golf' activities. This is in addition to previously defined key verticals of culinary, culture, coastal.
- Leveraging these lead opportunities, PEI's tourism leadership can target several local markets based with the right message at the right time, informed by data collected in tactical action 1.2: Research Potential Markets for the 2021 Tourism Season. Markets may include families, sports enthusiasts, adventure-seekers, and others.
- Local tourism campaigns may include the review and/or development/enhancement of new tourism materials such as visitor guides, brochures, and so forth.
- In addition to promoting tourism to PEI residents, PEI's tourism leadership should also find opportunities to align and work with Tourism Industry Association of PEI (TIAPEI) to promote the value and prioritization of tourism in support of the local economy. There is significant negative sentiment towards tourism and linking tourism with the potential growth that it can support will persuade residents of the value that tourism brings for recovery.

Timeframe/Trigger

- Within 1-3 months of strategy approval, situation permitting

Responsible

- TPEI (lead)
- TAIPEI (lead - resident sentiment)

Outcomes

- Preparation of key source market campaigns

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 06: PLAN AND EXECUTE ATLANTIC BUBBLE TOURISM CAMPAIGN(S) FOCUSING ON KEY MARKET SEGMENTS LIKE FAMILIES, COUPLES, ETC.

Description

- If local tourism is a critical factor to the success of PEI's 2021 tourism season, travellers from Atlantic Canada represent a close second success factor to optimize 2021 tourism season revenues.
- Historically, while travellers to PEI visited from Ontario, Quebec, other parts of Canada and the US with some international visitation, most travellers to PEI visited from the Atlantic Canada region.
- Focusing marketing campaigns in targeted markets (such as Newfoundland & Labrador - while small in number, they may seriously consider visiting when other parts of the country/world are still closed) as defined by research addressed in tactical action 1.2: Research Potential Markets for the 2021 Tourism Season, PEI may be able to entice those travellers in Atlantic Canada to stay longer, with more family members or friends, and spend more with a focus on identified market-ready or near-market ready opportunities like adventure and sports tourism, and/or golf and 'after-golf' activities. This is in addition to previously defined key verticals of culinary, culture, coastal.
- Atlantic bubble tourism campaigns may include the review and/or development/enhancement of new tourism materials such as visitor guides, brochures, and so forth.
- This tactical action revolves around development of integrated campaigns, armed with the research conducted in tactical action 1.2: Research Potential Markets for the 2021 Tourism Season, aimed at specific target areas within the Atlantic region, leveraging appropriate messaging, channels and influencers where necessary.

Timeframe/Trigger

- Within 1-3 months of strategy approval, situation permitting

Responsible

- TPEI (lead)

Outcomes

- Preparation of key source market campaigns

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 07: PREPARE DOMESTIC CAMPAIGN(S) FOCUSING ON KEY MARKET SEGMENTS LIKE FAMILIES, COUPLES, ETC.

Description

- After Atlantic Canada, most visitors arrived from destinations such as Quebec and Ontario. However, while travellers from these places may include targeted markets as defined by research addressed in tactical action 1.2: Research Potential Markets for the 2021 Tourism Season, timing for promotion to these markets needs to be well-thought, in anticipation of loosening COVID-19 restrictions.
- These campaigns should be developed for eventual launch when restrictions ease and travel channels become more widely accessible.

Timeframe/Trigger

- Within 4-6 months of strategy approval

Responsible

- TPEI (lead)

Outcomes

- Preparation of key source market campaigns

02. OPTIMIZE 2021 TOURISM RETURNS (to support key pillars of outdoor adventure, culinary, culture and coastal)

TACTICAL ACTION 08: LAUNCH EARTH CHECK TOURISM STANDARDS AND CERTIFICATION PROGRAM

Description

- In late 2020, PEI undertook a project to look at the business case for a health and safety certification program, engaging Twenty31 Consulting and EarthCheck, one of the world's leading travel and tourism sustainability standards and certification companies to support the project scope.
- PEI's travel and tourism operators need to offer services and experiences in a consistent, safe and sustainable manner which not only meets individual government regulations but also the heightened expectations of travel and consumer markets.
- The PEI Chief Public Health Office (CPHO) and its partners have developed a set of health and safety guidance documents (i.e., a standard) to directly help PEI businesses navigate the COVID-19 pandemic.
- These standards, which are tailored to various sub-sectors, align with the EarthSafe program – i.e., complementary to the EarthSafe standard and can be used as evidence against the standard criteria.
- However, the guidelines neither deliver a platform to allow the actual market and consumer response and implementation of operators to be tracked, nor deliver an assurance program (i.e., an independent audit leading to a certification).
- By readily adopting EarthCheck's 'EarthSafe' health and safety program, PEI can move beyond adherence to a health and safety standard towards actual certification to support tourism recovery and re-building confidence in residents, tourism businesses and visitors.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- TPEI (lead)
- TIAPEI (support)
- RTAs/DMOs (support)
- PEI CPHO and QTS (support)

Outcomes

- Providing assurance to residents, operators and visitors as we re-open tourism

03. PREPARE FOR NEXT 'NORMAL' AS PART OF RECOVERY

TACTICAL ACTION 01: IDENTIFY AND PRIORITIZE TOURISM INFRASTRUCTURE REQUIRING IMPROVEMENT AND BUILD BUSINESS CASE FOR FUNDING AND IMPLEMENTATION

Description

- Given the expected reduced number of travellers coming to PEI in 2021, there is an opportunity for the Island to undertake several maintenance and repair projects related to tourism infrastructure.
- PEI's tourism leadership can leverage its access to operators across the Island to identify and prioritize the top tourism-impeding infrastructure needs and build business cases to present to the appropriate authorities for funding their improvement.
- Top tourism infrastructure improvement opportunities may not solely lie in public spaces, but may also support private operators with expansion, renovation or additions to help offer safe spaces for larger events, for example, that may have an impact on the general public good.

Timeframe/Trigger

- Within 1-3 months of strategy approval
- Ongoing

Responsible

- TPEI (lead)
- RTAs/DMOs (support)

Outcomes

- Identified and priority list of required infrastructure improvements
- Improved tourism-related infrastructure

03. PREPARE FOR NEXT 'NORMAL' AS PART OF RECOVERY

TACTICAL ACTION 02: CREATE PROGRAMS TO SUPPORT/FUND SMALL TOURISM BUSINESSES

Description

- Overwhelmingly, PEI's tourism businesses that have been impacted by the COVID-19 pandemic are small tourism businesses. PEI's tourism businesses are the lifeline to PEI's tourism industry, and in many cases to the regions in which they operate.
- In the survey conducted to inform this strategic framework and tactical action plan, many respondents indicated that PEI's small tourism businesses require support. This support may take the form of:
 - Training support for frontline workers
 - Incentivizing market-readiness (i.e., cost-share targeted investments in product improvements and property maintenance/presentation)
 - Aligning with stakeholders on potential marketing opportunities
 - Supporting investments in adopting technology such as e-commerce
- Guided by responses received to inform this strategic framework and tactical action plan, along with research to conduct a deeper dive into the top opportunities that PEI's tourism leadership needs to support small businesses, PEI's tourism leadership needs to prioritize those opportunities and create programs to support them.
- Finally, together with TIAPEI, explore the development of a mental health program to support PEI tourism operator mental wellbeing.

Timeframe/Trigger

- Within 1-3 months of strategy approval
- Ongoing

Responsible

- TPEI (lead)
- TIAPEI (lead)
- RTAs/DMOs (support)

Outcomes

- Plans for small tourism business support/execution
- Development of a mental health program

03. PREPARE FOR NEXT 'NORMAL' AS PART OF RECOVERY

TACTICAL ACTION 03: CREATE PLAN TO SUPPORT AIR SERVICE RECOVERY

Description

- COVID-19 has had a devastating impact on air access to PEI with route closures, loss of frequency and seats, making tourism recovery from longer haul markets a significant challenge.
- Convincing airlines to fly to a destination is a time-consuming and arduous exercise that sometimes takes years to bare fruit.
- While it is not expected that air routes PEI's leadership has worked so hard to bring to the Island will return immediately upon re-opening of borders, the development of a plan of action, backed by a robust tourism recovery strategy and hard-numbers is the first step towards winning access to those routes again.
- This initiative is focused on supporting the creation of a multi-year plan, supported by data, for the implementation of new or previously-existent air routes that could support the return of visitation.

Timeframe/Trigger

- Within 1-3 months of strategy approval

Responsible

- Charlottetown Airport (lead)
- TPEI (support)
- Transportation and Infrastructure (support)

Outcomes

- Data-backed return of PEI air routes study and plan

03. PREPARE FOR NEXT 'NORMAL' AS PART OF RECOVERY

TACTICAL ACTION 04: EXPLORE ADDITIONAL TOURISM INDUSTRY FUNDING MODELS

Description

- Alternate models beyond taxpayer funding to support DMOs around the world are increasingly being used to support development and marketing of a destination's competitive tourism opportunity. For many destinations, it will prove to be one of the key factors of their success.
- Destinations around the world are becoming ever more creative in identifying potential funding models like levies, revenue performance sharing models, or Tourism Improvement Districts (TIDs) to support their operations, and more importantly their stakeholders and the economies in which they operate.
- COVID-19 is giving destinations an opportunity to review their funding mechanisms, before tourism rebounds, but more importantly to support the rebound itself and ensure availability of reserves for future potential catastrophes like COVID-19, ultimately protecting and improving a destination's economy.
- That said, most provinces across Canada already have implemented some sort of funding mechanism to support their operations, and those that have, will be competing for the limited travellers in more competitive markets - in essence travellers from PEI are funding tourism in other Canadian destinations.
- Therefore, it is necessary for PEI's tourism leadership to review current funding options available to it, whether it be an Island-wide levy and/or another funding mechanism.
- This initiative requires understanding of what comparable jurisdictions are doing, what possible legislation may need to be updated or enacted, how locals and visitors and would react to it and so forth.

Timeframe/Trigger

- Within 4-6 months of strategy approval

Responsible

- TPEI (lead)

Outcomes

- Study of potential funding models for PEI for go/no-go decision

03. PREPARE FOR NEXT 'NORMAL' AS PART OF RECOVERY

TACTICAL ACTION 05: DEVELOP LONG-TERM TOURISM STRATEGY

Description

- Just prior to COVID-19, PEI was in the midst of developing its 5-year accelerated growth tourism strategy. With the pandemic in full swing and the future of tourism unknown, the tourism industry-led steering committee decided to use a seasonal approach to strategy development, while waiting for more conclusive evidence of what a post-COVID-19 future may look like.
- In anticipation of additional evidence of what a post-COVID-19 future will be, TPEI, together with the industry-led steering committee and other industry stakeholders should initiate the co-creation of a longer-term tourism strategy.
- Aspects of the long-term tourism strategy that would need to be addressed include an in-depth review of existing market conditions and likely trends, comprehensive stakeholder engagement, in-depth target market research, identification and prioritization of key tourism opportunities and identification of specific initiatives that need to be undertaken to achieve the developed vision and objectives.

Timeframe/Trigger

- Within 4-6 months of strategy approval

Responsible

- TPEI (lead)
- Industry-led Steering Committee (lead)
- Industry Stakeholders (support)

Outcomes

- Longer-term strategy for the tourism industry

Each proposed tactical action is set against a timeline depending on prioritization for its completion based on need, impact and ease of implementation.

2021 TOURISM SEASON TACTICAL ACTION PLAN

	Immediately	Next 1-3 Months	Next 4-6 Months
1. STRENGTHEN TOURISM BASICS	<ul style="list-style-type: none"> Provide continuous and clear stakeholder communications Research potential markets for the 2021 tourism season 	<ul style="list-style-type: none"> Provide continuous and clear stakeholder communications Research potential markets for the 2021 tourism season Compile, review and share guidelines, guidance, policies, programs, funding opportunities and other types of support Work with lead tourism HR agencies to explore HR assistance programs Revamp tourism technology to better meet operator and visitor needs Support expansion of Canada’s Food Island gift card program 	<ul style="list-style-type: none"> Provide continuous and clear stakeholder communications Research potential markets for the 2021 tourism season
2. OPTIMIZE 2021 TOURISM RETURNS	<ul style="list-style-type: none"> Develop events and experiences related to adventure & sports tourism Develop events and experiences related to golf and ‘after-golf’ 	<ul style="list-style-type: none"> Develop events and experiences related to adventure & sports tourism Develop events and experiences related to golf and ‘after-golf’ Maximize opportunities for local and regional Meetings and Conventions Develop events and experiences using existing infrastructure such as trails and event grounds as located throughout the province Plan and execute local tourism campaign(s) Plan and execute Atlantic bubble tourism campaign(s) Launch tourism health and safety certification program 	<ul style="list-style-type: none"> Develop events and experiences related to adventure & sports tourism Develop events and experiences related to golf and ‘after-golf’ Prepare domestic campaign(s)
03. PREPARE FOR NEXT ‘NORMAL’ AS PART OF RECOVERY		<ul style="list-style-type: none"> Identify and prioritize tourism infrastructure requiring improvement and build business case for funding and implementation Create programs to support/fund small tourism businesses Create plan to support air service recovery 	<ul style="list-style-type: none"> Identify and prioritize tourism infrastructure requiring improvement and build business case for funding and implementation Create programs to support/fund small tourism businesses Explore additional tourism industry funding models Develop long- term tourism strategy

APPENDIX

Challenges impacting the 2021 tourism season

Opportunities to advance the 2021 tourism season

Engagement with PEI stakeholders informed the PEI tourism season strategic framework and tactical action plan.

CHALLENGES IMPACTING THE 2021 TOURISM SEASON*



OPERATOR LIQUIDITY

- Diminished or drastically reduced revenue in 2020
- Lack of capital for reinvestment and preparation
- Repairs and maintenance deferred
- Access to Emergency Wage Benefit program
- Inability to take on or service and increased debt



MARKET CONTRACTION

- Severe market contraction
- Border restrictions and gathering guidelines have removed entire segments of the visitor economy (e.g., cruise ship, conventions, spectator sports, events, and festivals)
- Islanders and those from Atlantic Canada bubble cannot alone support tourism



MARKETING

- Challenging marketing environment due to fluid border restrictions and changing consumer behaviour
- More competition between the Atlantic provinces
- Tourism PEI's website is old and hard to maneuver



RESIDENT SENTIMENT

- Islanders have become less welcoming of visitors due to fear of virus importation to the province



ACCESS

- Border and public health restrictions
- Reduction of flights by major carriers due to the pandemic
- Uncertainty of what markets will be granted travel status to PEI and when flights may resume has reduced PEI's ability to attract visitors to the Island
- Recovery of air capacity will be a long-term challenge



RESTRICTIONS/SAFETY MEASURES

- Restrictions placed on capacity and gathering size
- Inability to host large-scale events, meetings and conventions restrict PEI's ability to create a strong draw for visitors
- Timing of when restrictions are placed or lifted



CONSUMER BEHAVIOUR

- Product preferences and customer service expectations have been drastically altered (e.g., fear of travel, higher demand for self-contained units, fewer but more meaningful trips, etc.)
- Reduced income for many families and individuals resulting in reduced visitor spending



PLANNING

- Limitation of long-term planning due to unknown nature of pandemic
- Concern about not knowing how to appropriately staff their operation or which reservations to take, etc.



HEALTH & SAFETY

- Ensuring employee/customer safety
- Potential lack of a Canada-wide COVID-19 vaccination by spring 2021

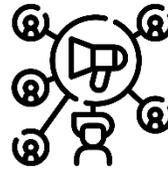
Engagement with PEI stakeholders informed the PEI tourism season strategic framework and tactical action plan (continued).

OPPORTUNITIES TO ADVANCE THE 2021 TOURISM SEASON *



OPERATOR SUPPORT

- Support PEI's tourism operators during 2021 targeted at reducing operator expenses or providing capital. Includes:
 - Extension or new wage and rent subsidy programs
 - Lobbying federal government to alter CEWS program to support seasonal businesses
 - Grants to support operators with season start-up capital
 - Elimination of TPEI fees through 2022
 - Incentivizing market-readiness (i.e., cost-share targeted investments in product improvements and property maintenance/presentation)
 - Marketing programs and grants
 - Training support for frontline workers
 - Support investments to establish or improve an operator e-commerce platform



MARKETING

- Focused on positioning PEI as Canada's safest province and/or a wellness destination. Includes:
 - Updating TPEI's website to be more live and interactive
 - Highlighting businesses that adapted and safely operated last year
 - Capitalizing on natural assets and market rural open-spaces and outdoor activities
 - Embracing Canada's Food Island and agri-experiential tourism, marketing the farm-to-table spectrum
 - Continuing to emphasize targeting locals and Atlantic Canadians, adapt to cater to their preferences
 - Utilizing Gift Card program to continue encouraging visitor spending locally
 - Increasing emphasis on promoting tourism products designed for local and maritime visitor markets



PRODUCT DEVELOPMENT

- Opportunity to re-invest in products and support operators that are seeking to develop new products and experiences.
- Outdoor leisure activities (e.g., golf, self-guided outdoor exploration - hiking, biking, etc., and water-based recreation - e.g., kayak, paddleboard, windsurfing, etc.)
- Additional product development support (i.e., workshops aimed at helping operators that need to adjust their product/experience due to elimination of their traditional market)
- Sports tourism and meetings & conventions as viable products beyond traditional leisure market

Engagement with PEI stakeholders informed the PEI tourism season strategic framework and tactical action plan (continued).

OPPORTUNITIES TO ADVANCE THE 2021 TOURISM SEASON *



INDUSTRY COMMUNICATIONS/COLLABORATION

- Comprehensive engagement of industry
- Create a regular policy update to keep the industry informed
- Create manual to help operators leverage resources available
- Create more awareness and partnerships for existing tourism operators and with other provincial/national NGO's that include indigenous tourism, multicultural tourism initiatives
- Create event where businesses can meet and create an opportunity to work together/partner
- Develop a corporate website
- Explore options to improve visitor's digital experience (e.g., an island-wide chatbot)



INFRASTRUCTURE INVESTMENTS

- Opportunity to invest in visitor infrastructure
- Aid and support for operator expansion, renovation, additions to help offer safe spaces for larger events
- Supporting transportation industry for facilitating visitation by air, sea, or bridge.



RESEARCH

- Re-examination of metrics used to gauge tourism success (i.e., move beyond visitor volume)
- Identification and profiling of targeted travellers for 2021
- Local visitor study aimed at populating a "wish-list" of businesses, activities, experiences, etc. that Islanders would like to see on the Island

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Twenty31 Consulting is a research and innovation-based management consultancy working with senior leaders of travel and tourism organisations to define and build sustainable, competitive advantage.



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