

EVALUATION OF THE 2015/2018 ACTP PROJECT – YEAR 1

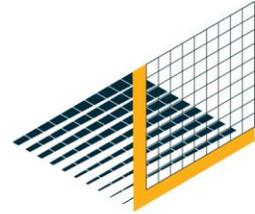
Submitted to:

Atlantic Canada Tourism Partnership

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I. OVERVIEW OF ACTP

1.1 Funding Partnership

The Atlantic Canada Agreement on Tourism (ACAT) commits the parties to continued support of the Atlantic Canada Tourism Partnership.

It is a three-year Agreement combining the limited resources of the government of Canada, the governments of the four Atlantic provinces and the four provincial tourism associations in the region. The intent is to undertake tourism market development on a pan-Atlantic basis.

The ACTP was originally founded in 1991 and has been renewed every three years since that time. The current ACAT came into effect on April 1, 2015 and will expire on March 31, 2018. The funding levels among the partners are as follows:

- Government of Canada: \$9,975,000
- Provincial Governments: \$6,583,500
- Industry Associations: \$3,391,500
- TOTAL \$19,950,000**

The detailed funding for the Agreement is set out in Table 1 below.

Table 1: Funding for the Agreement

	Marketing	Evaluation	Administration & Secretariat	Total	Share of Total
Newfoundland	\$1,375,058	\$9,503	\$51,839	\$1,436,400	7.2%
Nova Scotia	\$2,061,922	\$14,359	\$78,319	\$2,154,600	10.8%
New Brunswick	\$2,061,922	\$14,359	\$78,319	\$2,154,600	10.8%
Prince Edward Island	\$802,302	\$5,515	\$30,083	\$837,900	4.2%
Four Atlantic Provinces	\$3,391,500	\$0	\$0	\$3,391,500	17.0%
Canada	\$9,547,296	\$66,264	\$361,440	\$9,975,000	50.0%
Total	\$19,240,000	\$110,000	\$600,000	\$19,950,000	100.0%

The purpose of the Agreement is to combine the limited resources of the partners to undertake specific measures in tourism market development on a pan-Atlantic basis to grow tourism in the region by coordinating government and industry tourism activity in areas where the most benefit can be achieved for all, if executed on a regional basis.

The specific objectives of the Agreement are to:

- Market Atlantic Canada as a leisure travel destination in international markets;
- Market Atlantic Canada tourism products and experiences to the international touring trade; and
- Market Atlantic Canada to international journalists and travel writers.

1.2 Structure and Key Activities

There are three strategic elements associated with the Agreement.

- **Strategic Element One – Marketing:** Based on an annual marketing plan, projects are developed and undertaken to expose consumers, travel media and the travel trade in international markets in the United States and overseas to Atlantic Canada’s tourism products and experiences. The overseas countries currently include the United Kingdom and Germany. The target regions in the United States include New England (Maine, Vermont, New Hampshire, Massachusetts, Rhode Island and Connecticut) and Mid-Atlantic (New Jersey, New York, Pennsylvania).

Projects are developed with advice from the Project Marketing Advisory Committee and use modern and leading marketing techniques to create awareness and demand for Atlantic Canada’s tourism products and experiences. Activities are to be research driven, strategic and effective. All activities will be evaluated to measure effect and penetration.

- **Strategic Element Two – Evaluation:** Annual and end of Agreement evaluations will be undertaken under the direction of the Project Evaluation Advisory Committee. The evaluations will assess overall effectiveness of the Agreement and its impact on the tourism industry.
- **Strategic Element Three - Administration:** A Secretariat is established to fulfill the requirement for the overall administration of the ACAT; this is a function that cannot be provided individually by the parties to the Agreement. The Tourism Association of Prince Edward Island (TIAPEI) on the basis of a response to a Request for Proposals was selected as “Recipient” of the Agreement on behalf of the tourism industry in Atlantic Canada. In turn, they act as the Secretariat and carry out specific administration duties designed to support overall management of the Agreement.

1.3 Business and Market Environment

When evaluating tourism marketing efforts it is important to recognize the current business and market environment. Numerous factors affect tourist travel choices in addition to ACTP marketing efforts. The key recent developments are described for each target market below.

1.3.1 US Market

U.S. economic conditions continue to improve modestly from the financial crisis with real gross domestic product (GDP) up 2.4% in 2015 (U.S. Bureau of Economic Analysis). The number of U.S. travelers considering a trip to Canada is the highest since 2007, and up to 44% of U.S. travellers indicate they will travel more in the next 2-3 years (CTC US Global Tourism Watch 2014). The most notable change has been the exchange rate where the Canadian dollar dropped 16% from \$0.86 U.S. to about \$0.72 over the course of 2015 (Bank of Canada). In the February 12, 2016 Globe and Mail article “Tourism to the Rescue”, Statistics Canada and TD Economics analysis shows how U.S. travel to Canada is up 7-8% since the loonie began dropping. The article emphasizes the need to promote the low loonie to U.S. travellers since there may be low awareness of the exchange rate, especially in states away from the Canadian Border. U.S.

travellers continue to seek scenery and natural beauty on visits to Canada (CTC US Global Tourism Watch 2014). Canadian destinations are viewed as affordable but somewhat weak on value. Of particular interest to Atlantic Canada, Westjet is establishing a route from Boston to Halifax offering easier access to the region in 2016.

1.3.2 UK Market

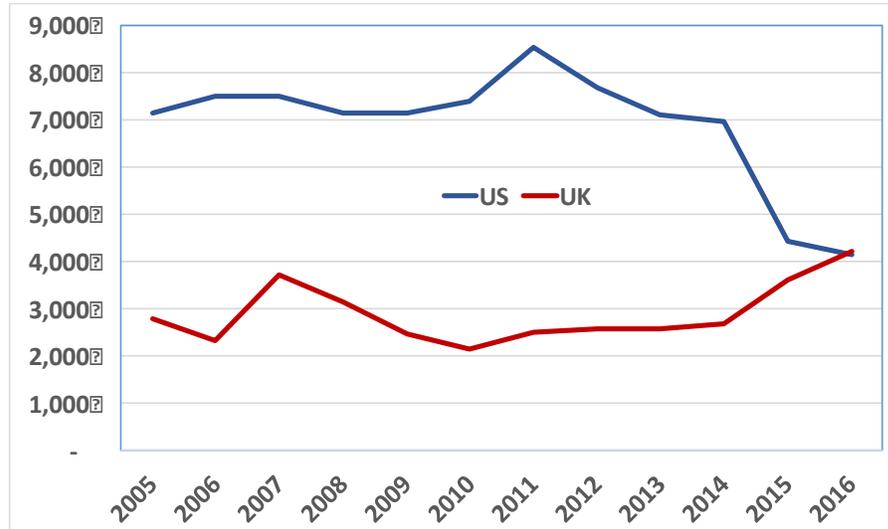
According to CTC UK Global Tourism Watch, U.K. travel to all destinations has remained stable through recent economic challenges. Fewer travellers are opting for long-haul trips, preferring destinations closer to home where the Pound is strong relative to the Euro. Canada's exchange rate versus the British Pound is increasingly attractive having dipped by 11% from 0.55 to 0.49 Pound per dollar over the course of 2015 (Bank of Canada). There

is rising interest in all-inclusive deals and working holidays. There is also a particular interest in working holidays that offer events, shows, experiences, and challenging activities that allow travellers to return with a new skill



or sense of accomplishment. Air Transat flights from London are discontinued, but new and regular flights with Air Canada and WestJet from London and Glasgow in 2016 will result in the the highest ever weekly seats from the U.K. to the region (see figure below).

Atlantic Canada International Air Access - Annual Inbound Seats for U.S. and U.K.



Source: Atlantic Canada airport authorities

1.3.3 Global Context

Tourism continues to globalize with more diverse and unique destinations and experiences available to choose from. Economic headwinds have presented a challenge to some travellers, causing them to seek more affordable trips. Geopolitical instability in other regions may favour Canada as a destination with the comfort of relative security and safety. Consumer demographics and household family composition continue to shift along with urbanization and access to new technologies that shape how tourists plan and enjoy their trip experiences. Overall, this remains a highly competitive and dynamic environment within which to position Atlantic Canada.

1.4 Market Performance

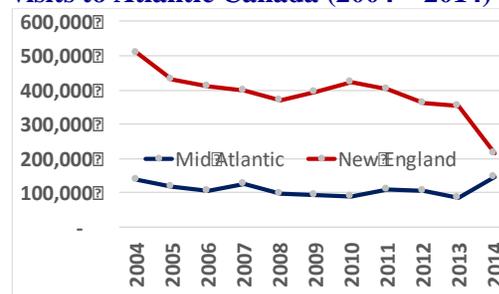
1.4.1 Market Performance

Heading into the 2015 campaign, signs of strengthening economic conditions were emerging in terms of U.S. and U.K. demand for Atlantic Canada tourism. Performance measures for Atlantic Canada are based on International Travel Survey data from Statistics Canada showing overnight visitation changes from 2013 to 2014. Atlantic Canada is also compared to the rest of Canada in terms of market share of inbound travel from U.S. and U.K. travellers. Overall, Atlantic Canada increased tourism activity from both the U.S. and U.K., while becoming more competitive than the rest of Canada in attracting travellers from these markets.

1.4.2 United States

From 2013 to 2014, overnight arrivals from New England declined 39.2%, however Mid-Atlantic U.S. arrivals compensated with an increase of 74.8%. Overall, visitation from all of U.S. increased by 13.4%. The New England arrivals decline translated to a spending decrease of 23.4%, but this was countered by a 73.9% increase in spending from the Mid-Atlantic U.S. There was an increase of 26.6% in overall U.S. overnight spending. Atlantic Canada did particularly well by increasing its share of U.S. overnight arrivals to Canada by 9.7%, and by increasing its share of U.S. overnight spending in Canada by 18.2%.

U.S. Mid Atlantic and New England visits to Atlantic Canada (2004 – 2014)

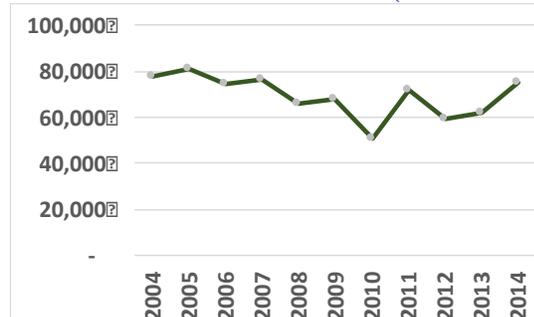


Source: Statistics Canada ITS

1.4.3 United Kingdom

Overnight arrivals from the U.K. also increased and by a larger amount (up 21.5%). This led to increased overnight U.K. traveller spending by 12.1%. The increased arrivals to Atlantic Canada was enough to increase its share of overnight U.K. arrivals to Canada by 9.3%, but the share of spending in Canada remained unchanged from 2013 to 2014.

U.K. visits to Atlantic Canada (2004 – 2014)



Source: Statistics Canada ITS

ACTP Overnight Market Indicators (ITS 2013 – 2014 changes)

	UNITED STATES	UNITED KINGDOM
ARRIVALS	<ul style="list-style-type: none"> • 74.8% increase - Mid-Atlantic • 39.2% decline - New England <p>U.S. Increase 13.4%</p>	<ul style="list-style-type: none"> • 21.5% Increase in overnight arrivals <p>U.K. Increase 21.5%</p>
SPENDING	<ul style="list-style-type: none"> • 73.9% increase - Mid-Atlantic • 23.4% decrease - New England <p>U.S. Increase 26.6%</p>	<ul style="list-style-type: none"> • 12.1% increase in overnight spending <p>U.K. Increase 12.1%</p>
MARKET SHARE	<ul style="list-style-type: none"> • 9.7% increase in share of U.S. arrivals to Canada • 18.2% increase in share of U.S. spending in Canada 	<ul style="list-style-type: none"> • 9.3% increase in share of U.K. arrivals to Canada • Unchanged share of U.K. spending in Canada

II. ANALYSIS AND FINDINGS

2.1 Governance and Management

In 2012 (the start of the previous Agreement), the ACAT represented a transition from prior Memorandum of Understanding type agreements into a Federal-Provincial Agreement with industry participation. The current ACAT 2015 – 2018 represents a continuation of the Federal-Provincial style Agreement. The roles, responsibilities and authorities that changed under the previous Federal-Provincial Agreement format have continued on in this current Agreement.

2.1.1 2015 – 2018 Federal-Provincial ACAT Agreement

The 2015 – 2018 ACAT Agreement proposes multi-year funding for specific measures to be taken in support of tourism market development.

To meet these objectives of ACAT, a Recipient “TIAPEI” creates and executes (on an annual basis) fully integrated marketing strategies and tactics that promote Atlantic Canada (and its provinces) as a premier tourism destination in priority markets in the US, the UK, and now Germany. The 2015-2018 ACAT Agreement consists of:

- A Management Committee that approves all projects funded from pooled resources,
- Implementing Parties (four provincial departments of tourism and ACOA) that enter into contribution agreements with the Recipient to fund projects approved by the Management Committee, and
- Expert Advisory Committees that provide input and advice on the management of the 2015-2018 ACAT Agreement and its projects.

The Tourism Industry Association of Prince Edward Island (TIAPEI) on a basis of a response to a Request for Proposals was selected as “Recipient” of the Agreement on behalf of the tourism industry in Atlantic Canada. In addition to creating and executing marketing strategies, TIAPEI is charged with the responsibility for the overall administration of the Agreement and the coordination of annual and end-of-Agreement evaluations.

In fulfilling these obligations, TIAPEI submits annual marketing, administration and evaluation plans (and accompanying budgets) to the Management Committee for approval, then enters into contribution agreements with the Implementing Parties to fund the approved projects.

2.1.2 ACAT Management Committee

ACAT Management Committee is responsible for the overall administration and management of the 2015-2018 ACAT Agreement, for communication activities undertaken throughout the Agreement, and for coordinating the Agreement with other federal and provincial programs and industry activities.

The Management Committee consists of ten members that include the four provincial Deputy Ministers (or designates) responsible for tourism in Atlantic Canada; the Presidents (or designates) of the four tourism industry associations in Atlantic Canada; the Vice President of

ACOA-PEI and Tourism; and the Director General of Tourism Atlantic (ACOA). Destination Canada and the Secretariat are non-voting members.

The Management Committee appoints two co-chairpersons on an annual and rotating basis. One is a Provincial Minister appointee and the other is the President (or permanent designate) of a provincial tourism industry association in a different Atlantic Province.

In terms of project approval the Management Committee approves guidelines for application for funding, approves all projects unless delegated, and it also approves any reallocations of budgets between target markets or activities. The entire agreement is structured as a single project with TIAPEI providing Secretariat services.

Our review of Management Committee minutes and other Agreement documentation confirms its actions are conforming with its defined responsibilities.

2.1.3 ACAT Marketing Advisory Committee

The Management Committee has established the ACAT Marketing Advisory Committee to provide advice on specific aspects and details of the marketing initiatives. They are to provide information on emerging markets, their experience from unilateral provincial research initiatives and recent trends in forms of promotion and advertising. The committee will review the Annual Marketing Plans of TIAPEI and advise the Management Committee with respect to compliance with the ACAT. Budgeted expenditures for marketing are \$19,240,000.

Our review of Marketing Advisory Committee minutes conclude that the Marketing Advisory Committee is providing valuable feedback and advice to TIAPEI on proposed marketing initiatives for the ACTP and is providing strategic advice to the Management Committee on the effectiveness and relevancy of these marketing strategies.

Our review of the Marketing Advisory Committee minutes and other Agreement documentation confirms its actions are conforming with its defined responsibilities.

2.1.4 ACAT Evaluation Advisory Committee

TIAPEI, on behalf of the ACTP Agreement, works to ensure that an independent and objective evaluation of the 2015-2018 ACTP Agreement is completed on an annual and end-of-Agreements basis. Budgeted expenditures related to evaluation of the 2015-2018 ACTP Agreement are \$110,000. In fulfilling the requirement, TIAPEI coordinated the formation of an Evaluation Advisory Committee tasked with the responsibilities of:

- Developing the evaluation framework,
- Recommending the award of a contract for evaluation services,
- Providing input into the evaluation,
- Acting as a resource to the successful consultant, and
- Reviewing the evaluation report and providing feedback to TIAPEI and the Management Committee.
- Gardner Pinfold Consultants Inc. has been awarded the contract for evaluation services.

Our review of Evaluation Advisory Committee minutes and other Agreement documentation confirms its actions are conforming with its defined responsibilities.

2.1.5 ACAT Administration

Through the creation of a Secretariat, TIAPEI fulfills the requirement for the overall administration of the 2015-2018 ACAT Agreement, a function that cannot be provided individually by the Implementing Parties (federal or provincial crowns). Budgeted expenditures for administration of the Agreement totaled \$600,000. The Secretariat manages the activities of the 2012-2015 ACAT Agreement under the direction of the Management Committee. The Secretariat's functions include:

- Overseeing the day-to-day operations and financial administration of the Agreement to ensure all matters are administered in accordance with the 2015-2018 ACAT Agreement,
- Providing secretariat services, meeting minutes and detailed financial reports to the Committees,
- Developing and implementing an efficient and effective Management Information System for the collection, use, disclosure and distribution of pertinent information, and
- Conducting communications activities in accordance with directives received from the Management Committee.

Our review of the secretariat management of activities confirm their actions are conforming with its defined responsibilities.

2.1.6 Policies and Operating Guidelines

On March 25, 2015 the Management Committee approved the Policies and Operating Guidelines, which were developed to provide clarity and direction for the implementation of the ACAT. Although ACAT had been operating under the previous Agreement without a finalized version, the new document was developed as part of the transition plan from the MOU style to the Federal Provincial Agreement. It took substantial work including the support of a consultant. Based on a review of minutes for Management Committee and other Agreement documentation, it appears the policies and guidelines are being adhered to.

2.2 U.S. Marketing Program

The total budget for the U.S. market in 2015-16 was \$4.5 million including the consumer campaign, travel trade program, and media relations. The target for ACTP return on investment (ROI) is to achieve at least \$10 for every dollar invested and the overall ROI for the program was \$23.47. The U.S. and U.K. marketing programs achieved a combined ROI of \$22.79. Indicators and targets for each program are described briefly in turn below, and the review indicates that ACTP decisions regarding target markets, market segmentation, and tactics are all based on solid market research and understanding of the tourism industry and market dynamics.

2.2.1 Consumer Campaign

The direct-to-consumer advertising campaign in the Mid-Atlantic and New England States builds on the four provincial tourism brands. Print media including magazines, newspapers, online advertising and social media are all deployed in these markets. The market performance indicators were positive with visits leading to \$78.9 million in spending. The return on investment (ROI) was \$23.40 dollars in revenue for each dollar invested, and this is up from an ROI of

\$14.84 in 2014. Time + Space Media provides \$2.1 million worth of negotiated and incremental value to the four Atlantic provinces for U.S. planning and buying services.

2.2.2 Travel Trade

Travel trade is a secondary strategy behind direct-to-consumer, but the partnerships with tour operators and travel influencers is effective. The expected outcomes include joint marketing partnerships and ROI, trade shows and training. Five (5) joint marketing partnerships were maintained in 2015 (down by one since 2014), offering \$159,789 in leveraged investment and producing \$2.5 million in related sales. ACTP participated in one consumer show and delivered educational training to 96 U.S. travel agents and tour operators. These partnerships achieved an ROI of \$19.84 for every dollar invested.

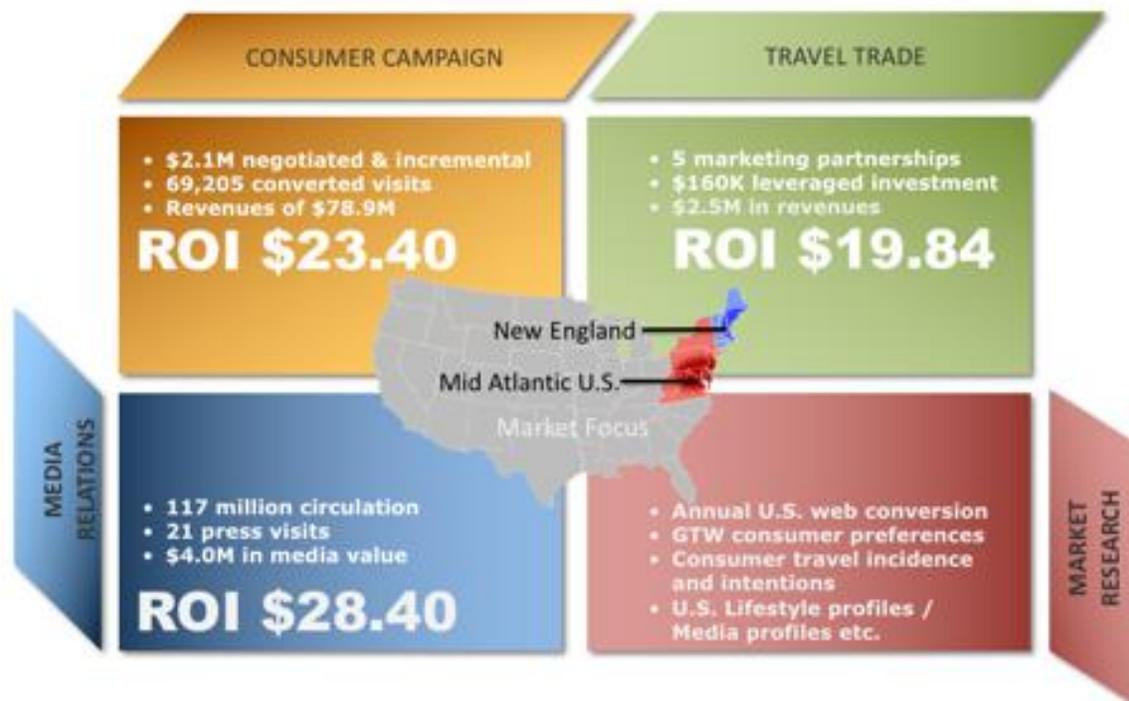
2.2.3 Media Relations

The aim is to attract media attention to the Atlantic Canada region, and encourage press trips to the individual provinces, and the region as a whole. Meredith Pillon Marketing Communications Inc. has been retained to help implement the media relations program including the creation and distribution of press releases, coordinating press trips, site tours, media events and other activities. Media relations investments reached a total circulation of 117 million, and generated 21 press visits. The program's earned media value is estimated at \$4.0 million and represents an ROI of \$28.40 for every dollar invested (based on value in Canadian currency).

2.2.4 Market Research

Research continues to be the foundation for well-informed ACTP strategy and market investment. Annual U.S. web conversion studies are conducted to determine ROI performance. Global Tourism Watch (GTW) in partnership with Destination Canada tracks changes in consumer preferences. Market selection is based on Statistics Canada data, provincial tourism statistics, ACTP Consumer research and Destination Canada Market Portfolio Analysis. Additional research examines travel incidence and intentions, awareness and interest in Canadian destinations, and other influential factors.

ACTP United States Marketing (2015)
Overall ROI of \$23.47 for every dollar invested (CAD)*



* Currency conversions based on Bank of Canada Year average exchange rate (\$1.297 per USD).

Sources: Consumer Campaign Media Post-Execution Reports; Travel Trade Tour Operator Results; Media Relations Earned Media Value Reports.

2.3 U.K. Marketing Program

The total budget for U.K. marketing in 2015-16 was \$559,665 including the consumer campaign, travel trade program, and media relations. ACTP targets for return on investment in the U.K. market are also set to \$10 for every dollar invested and an overall return of \$15.56 was achieved. The U.S. and U.K. marketing programs achieved a combined ROI of \$22.79. Sound market research and understanding of U.K. travellers continue to support the approach to this market. The marketing strategies and tactics reflect comprehensive analysis of geographic, demographic, and lifestyle factors.

2.3.1 Consumer Campaign

Tactical elements of the U.K. consumer campaign include print ads, programmatic television ads, online ads and search engine marketing. The objective is to build awareness of the Atlantic Canada region, increase visits and increase revenues. Time + Space Media delivered the 2015 U.K. program leveraging \$92,257 worth of negotiated and incremental value. The January to April 2015 campaign was completed with a total spend of \$235,445. There is no conversion report available to calculate a consumer campaign ROI.

2.3.2 Travel Trade

The U.K. marketing maintains a highly developed travel trade program owing to research demonstrating that U.K. travellers tend to book long-haul trips by this means. Working with travel trade partners, the expected outcomes are joint marketing partnerships and ROI, trade shows and training. The travel trade program maintained 13 joint marketing partnerships (up from 9 in 2014). ACTP participated in two tradeshow and delivered educational training to 585 U.K. travel agents and tour operators. These partnerships generated \$3.2 million in sales, leveraged \$144,049 and achieved an ROI of \$22.55.

2.3.3 Media Relations

ACTP retains Brighter Group to coordinate media relations in the U.K., including press releases, media outreach, media visits, and events. The media relations program reached an estimated circulation of 39 million, and supported 13 press visits. The total earned media value represented by the program was \$2.1 million and achieved an ROI of \$10.44 for every dollar invested.

2.3.4 Market Research

Research also underpins the U.K. marketing strategy. Global Tourism Watch (GTW) in partnership with Destination Canada tracks changes in consumer preferences. Market focus is based on Statistics Canada data, provincial tourism statistics, ACTP Consumer Research and Destination Canada Market Portfolio Analysis. Additional research examines awareness and interest in Canadian destinations, media consumed and other influential tourism factors.

ACTP United Kingdom Marketing (2015) Overall ROI of \$15.56 for every dollar invested (CAD)*



* Excludes consumer campaign since no conversion study available.

Sources: Consumer Campaign Media Post-Execution Reports; Travel Trade Tour Operator Results; Media Relations Earned Media Value Reports.

2.4 Germany Pilot Program

The Germany Pilot Program is a partnership among Destination Canada and six provincial/regional partners including: British Columbia, Alberta, Manitoba, Ontario, Québec and Atlantic Canada. The budget to participate in this program resulted from efficiencies identified in the implementation of the agreement. The objective is the build awareness of Atlantic Canada utilizing content marketing, tour operator partnerships, paid media and social media tactics.

The target audience will be the Learners (Cultural Explorers – 17% of German market and Authentic Experiencers – 13% of German market) and Enthusiastic Indulgents (Free Spirits – 12% of German market). These audiences will be reached through YouTube and Instagram influencer visits, content generation and distribution, tour operator engagement and partnerships, and other marketing activities.

The year-long campaign will cost \$250,000 and the ROI performance will be measured using Statistics Canada International Survey data with a target of \$10 in revenues per dollar invested. Asset development began in July 2015, paid marketing took place in October to December of 2015. This program will be evaluated as part of next year's evaluation since results are not available yet.

III. KEY FINDINGS

The following offers the critical findings across the areas of evaluation contained in this report. In general, the project is functioning according to the terms of the ACAT and marketing programs are delivering positive results.

- **Governance and Management:** Our review of activities and meeting minutes confirms that programs are operationalized according to the ACAT. The Management Committee, Marketing Advisory Committee, and Evaluation Advisory Committee are operating according to their responsibilities. TIAPEI is creating and executing marketing strategies, and fulfilling administrative, secretariat, information management, and communications functions.
- **Business and Market Environment:** Based on review of indicators and reports on key markets and global tourism trends, there are continued economic challenges and strong competition for tourists but there are modest signs of strengthening in the key target markets.
- **Combined Marketing Programs:** The ROI for all marketing is \$22.79 for every dollar invested, and this exceeds the goal of \$10.00. The marketing plans and decisions are clearly based on well-researched and thoroughly considered analysis of target markets.
- **U.S. Marketing Program:** The overall ROI is \$23.47 for every dollar invested, and each program component ROI is also above the \$10.00 target.
- **U.K. Marketing Program:** The overall ROI is \$15.56 for every dollar invested, and each available program component ROI is above the \$10.00 target.
- **Germany Pilot Project:** This will be evaluated in the next year when data becomes available for calculating the ROI.

IV. RECOMMENDATIONS

As part of Year 1 evaluation of the status of the recommendations offered in the Final Evaluation of the 2012 – 2015 Agreement were reviewed. The findings are summarized below.

Recommendation	Comment
Continue ACTP partnership Review ACTP for efficiencies	<ul style="list-style-type: none">• New agreement signed for 2015 - 2018• Secretariat completed review and recommendations accepted by Management Committee on March 25, 2015.
Continue to consider flexibility	<ul style="list-style-type: none">• Flexibility continues to be observed. An example in Year 1 was participation in the Germany Pilot Project.
Review measurement tools	<ul style="list-style-type: none">• This continues to be an ongoing function utilizing input from industry and provincial partners.

No new recommendations will be offered until the Year 3 Final Evaluation when stakeholder interviews will be conducted.