

Manitoba

CANADA'S HEART  BEATS

Charting a Roadmap for Recovery

Travel
Manitoba
 .com

2020/2021 Annual Report



Table of Contents

5	Message from the Board Chair and President & CEO
7	About Travel Manitoba
8	The Tourism Industry in Manitoba (Pre-COVID)
9	The Devastating Impact of the COVID-19
9	Responding to Challenges of the Pandemic
10	Building Back Better
11	Charting a Roadmap for Recovery
13	Working to Rebuild While Keeping Manitobans Safe
13	Summer 2020 Campaign
15	Churchill Packages Campaign
21	Fall/Winter Campaign
22	Leading Marketing Excellence and Advancing Destination Management
22	Place Branding
23	Manitoba 150
24	International Marketing
25	Digital Marketing
26	Content Marketing
27	Communications & Branding
31	Award Recognition
32	Fishing & Hunting
36	Francophone Tourism
37	Indigenous Tourism
38	Building Support for Tourism
39	Industry Recovery Support
39	Advocating for Affordable Insurance
40	Research to Support Additional Tourism Growth
43	Diversity, Inclusiveness and Anti-Racism Initiative
44	Board of Directors
44	Our People
45	Financial Statements

ON THE
COVER

Brule Trail, Riding Mountain National Park





Message from the Board Chair and President & CEO

While the impact of the COVID-19 pandemic has been felt in all sectors, the travel, tourism and hospitality industry has been decimated by the outbreak. The current situation facing the tourism sector in Canada is the worst ever seen, more dire than the impact experienced after 9/11, SARS, and the 2008 economic crisis combined. It is estimated that 80% of businesses in the sector are at risk of failure. In Manitoba, lost hospitality jobs account for almost half of all lost jobs during the pandemic.

Prior to the pandemic, Manitoba's tourism industry supported close to 21,000 direct and indirect jobs, and tourism wages and direct spending contributed \$649 million in tax revenues to the economy, money that went to support critical public priorities such as health care and education. Manitoba welcomed 10.5 million visitors who spent \$1.64 billion throughout the province in 2019, spending that was dispersed throughout the province, contributing to the development of regional communities.

Tourism is a crucial part of Manitoba's economy, representing 2% of Manitoba's economy if measured by GDP, and 3% if measured by jobs. Clearly, the province's economy will not fully recover until the travel sector recovers.

Travel Manitoba's focus during the pandemic has been on helping the industry recover, as it rebuilds from the devastating crisis. Throughout it all, Travel Manitoba continued to provide updates on the state of the tourism industry and our future plans. We communicated regularly and often with industry to understand their challenges, and kept up-to-date on provincial and federal financial relief programs in order to inform the industry and guide decision-making. Our travel trade team also kept Manitoba travel trade partners up to date on international markets, closures, traveller and resident sentiment, and tour operator feedback.

We have spent considerable time and effort advocating for relief for the sectors of the tourism industry most reliant on international travel. Churchill's economy, for example, is largely dependent on tourism, and 80% of all its visitors are international. Support for Churchill's tourism industry is more than support for a few businesses, it is support for the town's livelihood. Hunting and fishing lodges have also sustained catastrophic losses, as the

majority of their clientele are from the restricted U.S. market. A 50% loss of hunting and fishing lodges would cost the province \$33 million in business sales, 404 jobs and \$5 million in provincial and local tax revenue.

To help mitigate the losses from the lack of out-of-province visitors, Travel Manitoba moved to aggressively market travel within the province. When regulations allowed, we encouraged Manitobans to travel safely by staying in their own province with our Home Is Where the Heart Is campaign. A revamped website and engaging social content helped drive visitors to partners that were able to be open for business or offer virtual experiences.

As we head into a new fiscal year, and the uncharted territory of an industry in recovery, we are confident that we have the roadmap to rebuild. The new Manitoba Tourism Strategy, led by a collaboration of the Manitoba Government, the Manitoba Chambers of Commerce and Travel Manitoba, has a target to grow visitor spending by 50% to reach \$2.5 billion by 2030. The strategy outlines 27 initiatives to support the strategy's goals to lead brand and market positioning, advance destination management, foster collaboration and build support for tourism.

While the effects of the pandemic will be long lasting, we can approach the future with optimism. The setbacks of COVID-19 are a challenge, but they are also an opportunity to adjust our focus, clarify our priorities and work together to rebuild better than before.



Stuart Murray
*Chair of the Board of Directors,
Travel Manitoba*



Colin Ferguson
*President & CEO,
Travel Manitoba*



↑ Stephenfield Provincial Park

Manitoba

CANADA'S HEART  BEATS

About Travel Manitoba

VISION

Manitoba is a must-visit four season destination generating sustainable economic growth by delivering inspiring and authentic experiences in its unique urban, rural and wild settings.

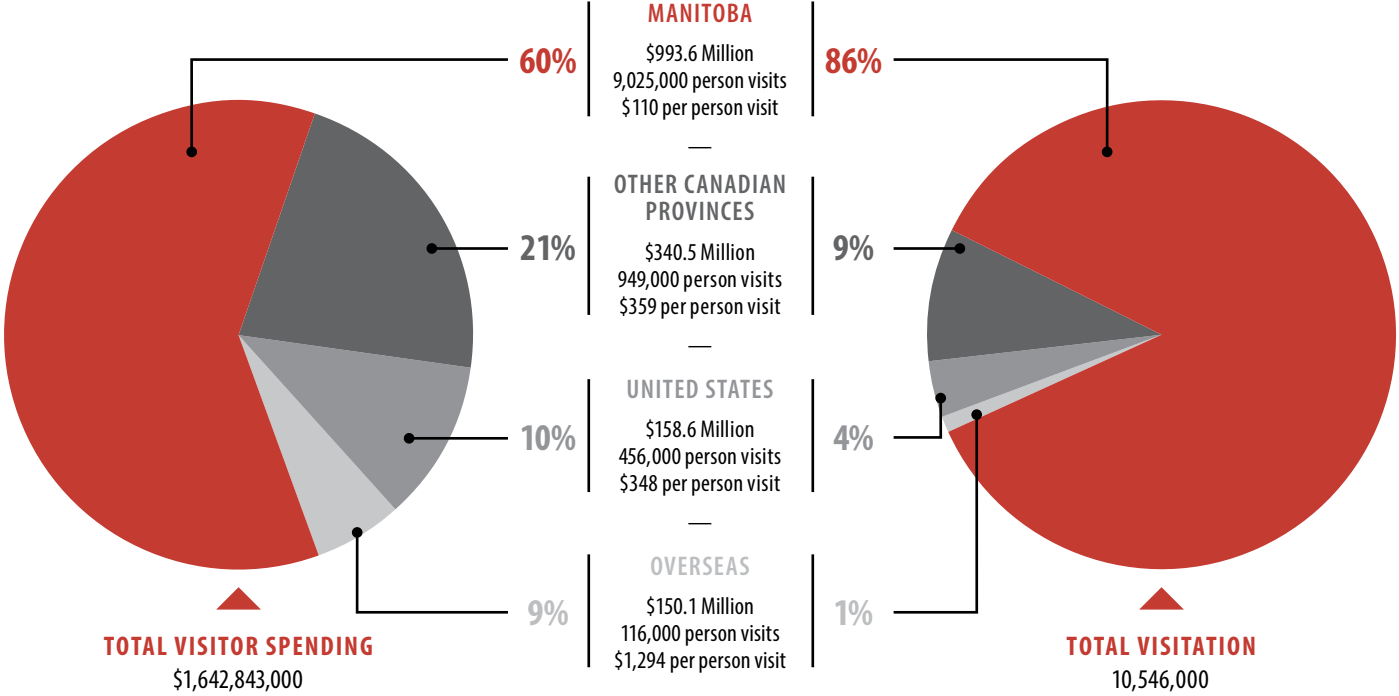
MISSION

Travel Manitoba will support the recovery of tourism's contribution to the provincial economy by leading the marketing of Manitoba as a tourism destination and by fostering a competitive and sustainable tourism industry.

OBJECTIVES

- ▶ Recover to the 2019 annual tourism expenditure level of \$1.6 billion by 2024
- ▶ Achieve \$2.5 billion in annual tourism expenditures by 2030 (50% growth)

The Tourism Industry in Manitoba (pre-COVID19)



Source: Statistics Canada – National Travel Survey (NTS) – 2019 Estimates. Statistics Canada Visitor Travel Survey (VTS) Small Area Estimation (SAE) – 2019 Estimates.



The Devastating Impact of Covid-19

Like every destination around the world, the COVID-19 pandemic hit Manitoba's tourism industry hard, and halted the growth of an industry that was on track to achieve annual revenues of \$2.2 billion by 2022.

While Manitoba's economy has held up relatively well during the crisis, the visitor economy is suffering. While the province as a whole has only lost 2% of the jobs it had pre-pandemic, or 13,700 jobs, employment in the lodging and restaurant sector is down 15%, or 6,500 jobs. These 6,500 lost hospitality jobs account for almost half of all lost jobs in Manitoba.

Total visitor spending losses associated with the COVID-19 pandemic will amount to over \$1 billion. Using three scenarios forecast by Tourism Economics – upside, baseline and downside – visitor spending will not recover to 2019 levels until 2024, and total losses will amount to \$1.8 billion under the baseline scenario. This lost visitor spending over four years results in losses of \$3.5 billion in business sales, \$1.6 billion in GDP, \$900 billion in wages, \$372 million in local and provincial tax revenue and an annual average of 3,978 jobs.

Urban hotels have been particularly hard hit by the pandemic, and Winnipeg's hotels are no exception, faring worse than the rest of the province. Through to September of 2020, room revenue was down 55%, a situation that is unlikely to improve even after a vaccine is widely distributed, as business and event travel that supports

significant occupancy will be slower to recover than leisure. Room revenue may not recover until 2025.

Fishing and hunting lodges, which pre-pandemic supported \$65 million in business sales, 808 jobs and \$9 million in provincial and local government revenue, have suffered significant losses due to international border closures that impact the arrival of their customer base. A 50% loss of hunting and fishing lodges would cost the province \$33 million in business sales, 404 jobs and \$5 million in provincial and local tax revenue, losses that would not be quickly recouped when the travel sector recovers, as bankrupt businesses are unlikely to find new investors in the short term.

For a small town, Churchill's visitor economy, with its iconic polar bears, beluga whales and northern lights, makes a large impact on the province, supporting 840 full time jobs and \$10 million in local and provincial tax revenue. Like the fishing and hunting sector, the majority of visitors to Churchill are international, whose travel plans are affected by restrictions and mandatory quarantines. Churchill's livelihood and its status as a flagship attraction for Manitoba are at risk. The economic costs of not supporting Churchill's visitor economy are apparent: \$42 million in annual GDP for the province and \$10 million in provincial and local tax revenue. The visitor economy is the primary source of income for Churchill, and the town of 899 individuals will struggle for existence without a strong rebound in the travel sector.

RESPONDING TO THE CHALLENGES OF THE PANDEMIC

In the early days of the pandemic Travel Manitoba developed a three stage plan: Respond, Rebuild and Restart. In the Respond phase, Travel Manitoba communicated regularly and often with industry to understand their challenges, and kept up-to-date on provincial and federal developments and programs in order to inform the tourism industry, collecting and distributing data and analysis to guide industry decisions.

COVID-19 INDUSTRY IMPACT SURVEY

Travel Manitoba surveyed Manitoba tourism industry stakeholders between April 1 and 6, 2020 to measure the impact of COVID-19 on business operations. In total, 369 companies and organizations completed the survey. The survey results helped identify industry needs that could be communicated to government. The results also supported Manitoba's role to advocate for funding access, communicate industry news and support a call for clarity around operating requirements. Highlights of the survey included:

- Twenty-five percent of respondents saw 100% declines in business in March and an additional 22% saw declines of 50% or more. Ten percent did not expect to see additional sales revenue in 2020 and 30% expected the overall impact to be a decline in sales of more than 50%.
- Fifty-three percent of businesses that responded to the survey temporarily or permanently closed. Forty-four per cent temporality or permanently laid off employees and 28% reduced staff hours.
- Fifty-nine percent of respondents indicated that they required government financial support to stay in business.
- Over 18% expected to close permanently over the next three months and 72% expected to close temporarily. Many were concerned about not being able to pay wages and bills.
- When asked about Travel Manitoba's role to support the industry, 36% of respondents focused on access to funding and 21% focused on marketing support to rebuild the industry. Ten percent highlighted communication efforts between government and industry around funding, industry news and operating requirements for specific sectors.



↑ Assiniboine Park Zoo
PHOTO BY JP MEDIA WORKS

MONITORING COVID-19 IMPACT

Throughout the course of the pandemic, Travel Manitoba has monitored and evaluated the impact on the province's tourism economy and shared this information regularly with industry to keep them up to date. Various data sources were used for this assessment including accommodation, mobile phone and border crossing data. Travel Manitoba also relied on data provided by Destination Canada including visitor and traveller sentiment data derived from surveys of Canadians and travellers in key target markets.

In order to mitigate the impact on the tourism infrastructure, we advised governments about gaps in funding programs. We paused paid marketing programs to have more resources for a future recovery campaign and we supported the promotion of the provincial government's stay at home message, with COVID-19 messaging on all TravelManitoba.com properties with links to the provincial government's information.

Travel Manitoba created a multi-page hub on TravelManitoba.com for the #stayhome movement (on English and French sites). The intent was to maintain interest in what Manitoba had to offer, giving visitors the ability to see and learn about Manitoba without leaving home.

Travel Manitoba created a Tourism Funding & Support Toolkit for COVID-19 after assessing the support programs available to Manitoba tourism businesses and identifying gaps. Support programs offered by other provinces were also examined. Gaps were communicated to the province on a weekly basis as issues evolved.

In addition, Travel Manitoba created a Restoring Safe Services Tourism Toolkit, in response to numerous questions from businesses looking for clarity on how Restoring Safe Services applied to their specific business operation. The toolkit pulls together information from various Province of Manitoba sources on general workplace practices, visitor communications, physical distancing, cleaning and PPE from a tourism specific perspective. It also outlined sector specific best practices.

BUILDING BACK BETTER

Our collaborative efforts with the Manitoba Hotel Association and the Manitoba Food and Restaurant Association mitigated some business closures by encouraging Manitobans to shop local and order take-out from local restaurants, and we supported the Manitoba Tourism Education Council's "Clean It Right" program to help restore consumer confidence.

We know that global competition will be fierce as the tourism industry begins to recover from the devastating effects of the COVID-19 pandemic, and Travel Manitoba's March 2 conference – Enhancing the Digital Competitiveness of the Industry – was just one of the ways that we worked to support industry in improving its readiness and its competitiveness. Over 200 industry members attended the event.

The local market will be key to the recovery of the tourism industry, and with a focus on appealing to this market, Travel Manitoba engaged Joe Veneto of Veneto Collaboratory in March to conduct a series of travel packaging workshops for all place brands, as well as Churchill operators. The sessions focused on the essential strategies that destinations, accommodations, attractions, restaurants and retailers must embrace and implement to drive visitation and generate economic development.

Travel Manitoba participated in a training program hosted by the Communities Economic Development Fund - Look North that focused on the development of tourism in Northern Manitoba. Travel Manitoba delivered a portion of the training, which covered tourism readiness, travel sentiment and improving visitor experience.

CHARTING A ROADMAP FOR RECOVERY

In 2020, the face of tourism changed. Once one of the province's most powerful economic drivers, well on its way to having its strongest year ever, COVID-19 brought the tourism industry to a standstill, in Manitoba and around the world. Tourism was the first sector to be severely impacted by the pandemic, and there is little doubt it will be amongst the last to recover.

The recovery is going to take time. International travel is not expected to fully recover until 2024. However, domestic and regional travel should recover more quickly, and by the second half of 2021, we may start to see significant progress.

To guide our recovery, Travel Manitoba began the development of a new roadmap for the future of the industry – the Manitoba Tourism Strategy. Led by a collaboration of the Manitoba Government, the Manitoba Chambers of Commerce and Travel Manitoba, and developed in consultation with leaders in the tourism industry and international tourism experts, the Manitoba Tourism Strategy has a target to grow visitor spending by 50% to reach \$2.5 billion by 2030.

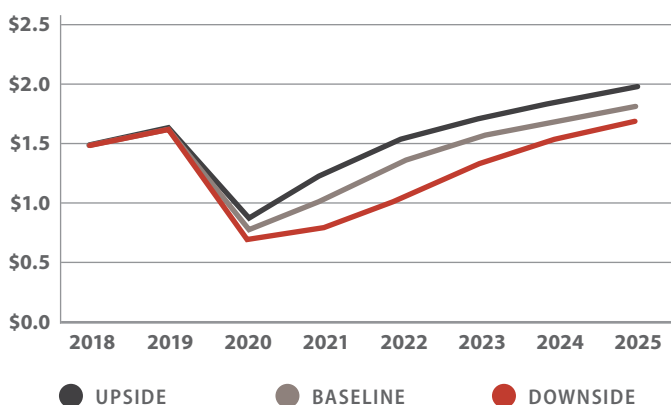
The Manitoba Tourism Strategy will enable us to stimulate recovery faster than economists are projecting. The aim is to build a more competitive tourism industry, one that is poised to capitalize on growth opportunities such as destination development, demand-generating experiences such as Indigenous experiences, Francophone attractions, winter activities, human rights educational experiences and the hosting of major events.

► The strategy outlines 27 initiatives to support its goals to:

- Lead Brand & Market Positioning
- Advance Destination Management
- Foster Collaboration
- Build Support for Tourism

VISITOR SPENDING IN MANITOBA, THREE SCENARIOS

Nominal CAD, billions



Tourism Economics was engaged in November 2020 to provide a Manitoba tourism forecast up to 2030 under three scenarios (upside, baseline and downside). Under the baseline scenario, Manitoba returns to 2019 visitor spending by 2024.

When the economic losses for the 2020 to 2024 period are totaled, the impact on visitor spending and the overall economy is significant. Under the baseline scenario over the 2020 to 2024 period, nearly 16,000 jobs are lost, visitor spending is reduced by \$1.8 billion and provincial tax revenues are reduced by a total of \$309 million.

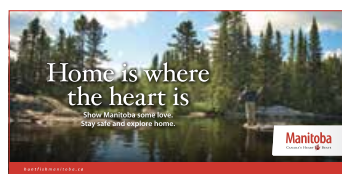
TOTAL ECONOMIC LOSSES* 2020–2024

	UPSIDE	BASELINE	DOWNSIDE
Visitor spending	\$1,274 M	\$1,803 M	\$2,672 M
Business sales	\$2,480 M	\$3,510 M	\$5,204 M
GDP	\$1,103 M	1561 M	2314 M
Wages	\$636 M	\$900 M	\$1,334 M
Jobs (FTE)	11,269	15,910	23,526
Taxes	\$494 M	\$699 M	\$1,036 M
Federal	\$232 M	\$328 M	\$486 M
Provincial	\$218 M	\$309 M	\$457 M
Municipal	\$44 M	\$63 M	\$92 M

*Includes indirect and induced impact, losses compared to 2019



Working To Rebuild While Keeping Manitobans Safe



CAMPAIGN GOAL

To increase tourism visitation and expenditures within Manitoba, and in particular, to increase overnight visitation and expenditures in Winnipeg by creating high quality content and advertising that promotes bookable experiences and attractions, adjusting as the supply of experiences available increases.

OBJECTIVES

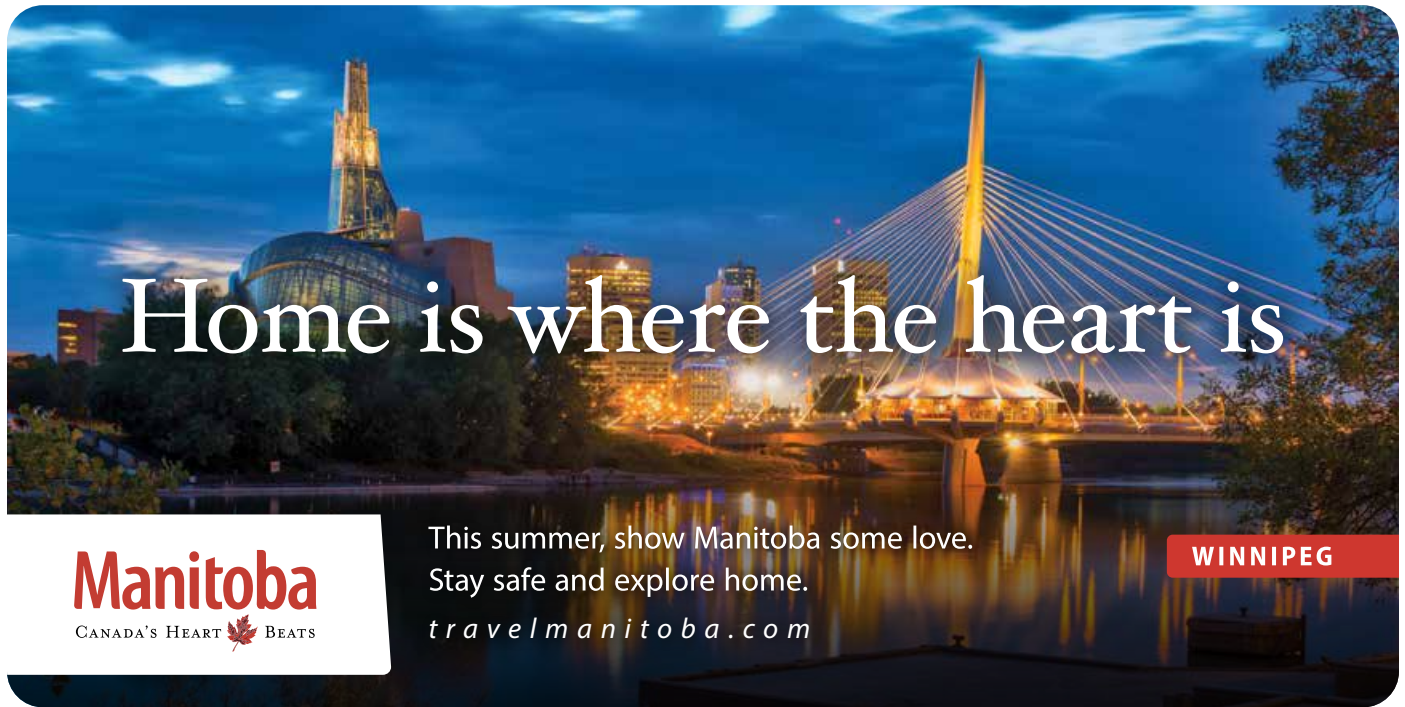
- ▶ To build visitor confidence, promote open businesses and their safety protocols.
- ▶ To create content that aligned with Destination Canada's campaign attributes of specificity, optimism and authenticity.
- ▶ To increase tourism expenditures within rural Manitoba communities, from both their local residents, as well as from visiting Winnipeggers. Special emphasis was placed on driving visitation to those communities that are part of Travel Manitoba's Place Branding program.
- ▶ To increase visitation to Riding Mountain National Park, and Clear Lake in particular, as a prime summer destination for Winnipeggers.
- ▶ To engage with tourism operators in Churchill, who are primarily focused on international markets, to create new tourism offerings that would appeal to Manitobans.
- ▶ To reflect Manitoba's market-ready Indigenous experiences in the campaign, and to develop additional marketing assets to showcase these experiences.
- ▶ Winnipeg: To generate overnight hotel bookings, primarily from visitors from Winnipeg and rural Manitoba, both direct and through Expedia.
- ▶ Winnipeg: To increase leads to tourism partners and increase overall tourism expenditures in Winnipeg by promoting attractions and experiences as they become operational.

SUMMER 2020 CAMPAIGN

With representation on Destination Canada's "10X" working group, Travel Manitoba was directly involved, along with industry counterparts across the country, in the development of Destination Canada's Domestic Program, "Canada Nice". The goal of the campaign was to build national pride and inspire Canadians to spend and travel domestically. Travel Manitoba was the first provincial marketing organization to sign an agreement with Destination Canada to receive \$1 million in matching funds to augment our in-province recovery campaign. Travel Manitoba allocated \$500,000 of the funds to Tourism Winnipeg for a Winnipeg- based summer leisure campaign.

Travel Manitoba's summer campaign goal was to increase tourism visitation and expenditures within Manitoba, and in particular, to increase overnight visitation and expenditures in Winnipeg, by creating high quality content and advertising that promoted bookable experiences and attractions, adjusting as the supply of experiences available increased.

We hosted an on-line industry webinar in May in collaboration with Tourism Winnipeg to communicate recovery marketing plans. Over 200 industry members participated in the webinar.



CAMPAIGN DURATION

June to September, 2020

TARGET MARKETS

Phase 1: Hyperlocal, Winnipeg and rural Manitoba

- ▶ Winnipeggers visiting rural Manitoba
- ▶ Rural Manitobans visiting Winnipeg
- ▶ Phase 2: NW Ontario and Saskatchewan

EQ TARGETS

- ▶ Cultural Explorers
- ▶ Authentic Experiencers
- ▶ Free Spirits



THEME

"Home Is Where the Heart Is" aligned with Travel Manitoba's provincial brand and showcased the experiences that make us love Manitoba. The campaign theme encouraged residents to "Show Manitoba some love" and spend their summers here. In the out-of-province markets, we invited visitors to "Come find their hearts in Manitoba". Like Destination Canada's "Canada Nice" campaign, the Manitoba campaign celebrated the diverse people and places that make our community distinctive and nice.

Laddering up to the provincial campaign theme, the Winnipeg theme tied into Travel Manitoba's campaign. Tourism Winnipeg let Winnipeggers know that there were plenty of ways to "Save your summer in Winnipeg" and used "Winnipeg - the heart of Manitoba" in its branding.

TACTICS AND METRICS

The fully integrated campaign featured media relations as well as traditional advertising along with digital, social and content marketing tactics.

PUBLIC RELATIONS

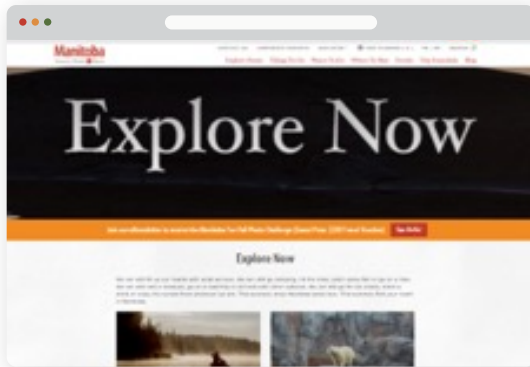
The campaign launched with a press release and media event resulting in:

- ▶ 176 articles
- ▶ Circulation: 28,512,179
- ▶ AVE: \$418,479

DIGITAL MARKETING

EXPLORE HOME WEB HUB

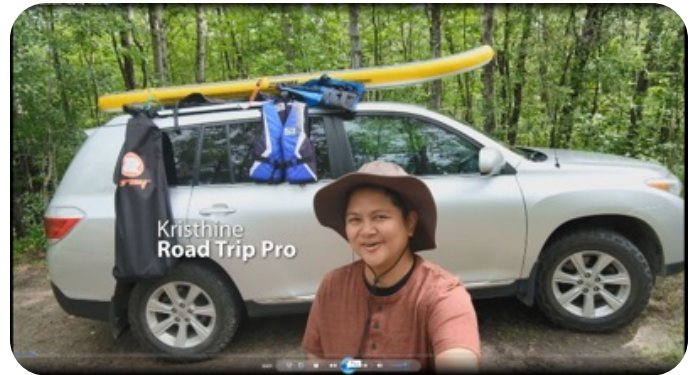
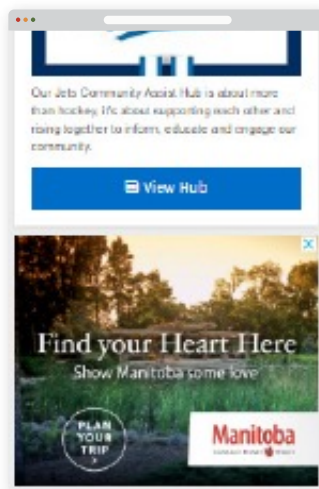
- ▶ Hub visits: 605,740 page views (June – October)
- ▶ 10 content pages focused on safe and accessible travel to our open tourism partners
- ▶ 498,925 unique page views
- ▶ 01:51 average time on page
- ▶ 60% of hub visitors from Manitoba



MULTI-CHANNEL DIGITAL CAMPAIGN

Ads promoted open attractions and accommodations across Manitoba, resulting in:

- ▶ 84,981,970 ad impressions
- ▶ 470,046 ad clicks
- ▶ 316,668 sessions
- ▶ 8,525 clicks directly to Travel Manitoba partners
- ▶ Channel breakdown (sessions + conversions via clicks to Travel Manitoba partners)
- ▶ Search (Google & Microsoft): 56,996 sessions | 7.4% conversion rate
- ▶ Facebook Ads (Facebook/Instagram): 138,978 sessions | 1.8% conversion rate
- ▶ Google Display: 85,935 sessions | 1.1% conversion rate
- ▶ StackAdapt Native: 34,759 sessions | 0.8% conversion rate



OTT CAMPAIGN

Six second and 30-second video ads featured a diverse group of Manitobans. Using existing audience data for precise targeting, the campaign included connected TV, pre-roll, native and display ads, online video and ran July 29 to September 23.

- ▶ 24,419,781 impressions
- ▶ 8,322 engagements
- ▶ 42,848 clicks
- ▶ 1,599,495 video completions
- ▶ Reach:
 - Display: 1,486,489
 - OLV: 634,487
 - CTV: 232,124
 - Native: 2,602,925

WEATHER NETWORK CAMPAIGN

This partnership included a suite of content (articles and videos) in addition to digital advertising (social media, digital billboards, carousel, city page takeover, in-weather companion, pre-roll). Running July 27 to September 7, the campaign was divided into themes of picturesque outdoor destinations, family attractions, Winnipeg attractions and birding destinations.

- ▶ Total impressions: 235,005
- ▶ Total clicks: 795
- ▶ CTR: 0.34%
- ▶ Total article views: 26,760
- ▶ Total impressions of Twitter posts (4): 68,940
 - Total engagement: 58
 - URL clicks: 117

WINNIPEG JETS PLAYOFF CAMPAIGN

- ▶ Impressions on Winnipeg Jets digital platforms: 466,706 (August 1 – 9)
- ▶ Impressions with Home Page takeover on Winnipegjets.com: 1,428,151 (August 4 and 6)
- ▶ Impressions with pre-roll video: 33,108 (August 9 – 24)

CONTENT MARKETING

Travel Manitoba repurposed past summer content and created a new suite of stories focused on getting Manitobans to travel throughout the province. Using Facebook, Instagram and Pinterest to target and boost this content, we saw sharp increases in the size and reach of our audiences compared to the same period in 2019.

EXPLOREMB.CA BLOG

- ▶ 748,813 pageviews
- ▶ 5.97% average click-through-rate
- ▶ 03:21 mins average time spent on page

NEW BLOG CONTENT:

- ▶ 20 hikes you've never heard of to take this summer
- ▶ 6 fantastic roadside attractions
- ▶ 8 roadside attractions to visit in the Pembina Valley
- ▶ 15 beautiful campgrounds that still have room this summer
- ▶ Interlake roadside gems
- ▶ 5 summer fun things to do at West Hawk Lake
- ▶ 4 ways to splish splash this summer

FACEBOOK

- ▶ 123,770 followers
- ▶ 80.3 million impressions
- ▶ 2.19 million engagements
- ▶ 807K link clicks
- ▶ 2.6% engagement rate

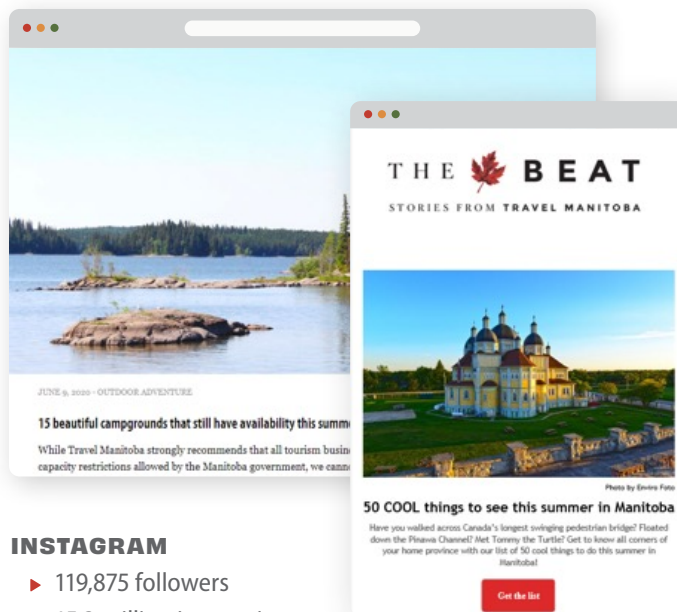
NEW VIDEO AND AUDIO CONTENT:

- ▶ Video: Home is Where the Heart Is / On n'est jamais aussi bien que chez soi
- ▶ Video: Feast Café and Bistro
- ▶ Video: Manitoba Through Your Lens
- ▶ Podcast: Under the Stars in Nopiming Provincial Park



Manitoba: Through Your Lens

10 weeks ago · 501.2K Views



INSTAGRAM

- ▶ 119,875 followers
- ▶ 15.3 million impressions
- ▶ 1.8% engagement rate
- ▶ 1.7 million Instagram Stories impressions

PINTEREST

- ▶ 5.78 million total impressions
- ▶ 3.61% engagement
- ▶ 73.1% Canadian audience

THE BEAT NEWSLETTER

A summer e-newsletter sign-up contest aimed at Manitobans resulted in 7,352 new email addresses. Through segmentation and customization, the overall engagement and reach of our newsletter increased in 2020:

- ▶ Subscribers: 42,056 (up 23.5%)
- ▶ Average Open rate: 28.27% (up 23.2%)
- ▶ 5.74% click rate

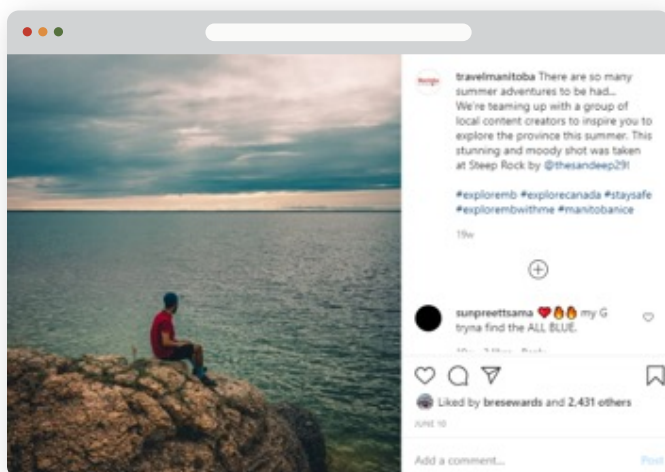
WESTJET PARTNERSHIP

A content partnership with WestJet saw custom content featuring Churchill and Manitoba's Indigenous tourism experiences delivered to subscribers of WestJet's Traveller e-newsletter.



INFLUENCER CAMPAIGNS & MEDIA RELATIONS

- ▶ Ten local Instagrammers shared previously captured summer content over six weeks to foster Manitoba travel.
- ▶ A contest that awarded \$200 - \$500 for expenses to those who shared their summer adventure on their social platforms resulted in:
 - ▶ 600 entries
 - ▶ 120 trips sponsored
- ▶ Local influencers were hired to explore shopping, dining and attractions in rural towns and share them on Instagram
- ▶ 229 Instagram stories
- ▶ 115,000 impressions
- ▶ Worked with local influencer This Battered Suitcase on a content campaign highlighting Brandon and Swan Valley.
- ▶ 88 pieces of content
- ▶ 58,000 impressions
- ▶ Hosted 10 media on a total of 10 trips between mid-June and September
- ▶ Steve Lyons - Parkland cycling tour (Assessippi, Dauphin, RMNP)
- ▶ Cassidy Coutts - Whiteshell day tour
- ▶ Brenna Holeman – Brandon Influencer Campaign
- ▶ Rod Pradniuk – Shining Falls Resort
- ▶ Shel Zolkewich – Churchill (Frontiers North Adventures' Birds, Bears and Belugas) & Flin Flon/The Pas/Cranberry Portage
- ▶ Jay Licudan (The Rustic Nomad) – Clearwater Lake, Paint Lake, Pisew Falls, The Pas
- ▶ Brenna Holeman – Swan River Influencer Campaign
- ▶ Deb Zanke – Churchill (Lazy Bear Expeditions' Ultimate Arctic Summer Adventure)
- ▶ David Cao – Winnipeg/RMNP



DIRECT MAIL – TOURISM WINNIPEG AND TRAVEL MANITOBA (JOINT)

- ▶ 500,000 pieces were distributed to targeted households in Winnipeg, rural Manitoba, Regina, Saskatoon, Thunder Bay, Kenora.

RADIO

- ▶ 12 week campaign ran June 8 – August 30 in Manitoba
- ▶ 21 weekly occurrences per station
- ▶ Additional 21 weekly occurrences as PSAs for all stations
- ▶ Out of province: 4 week campaign, July 27 – August 23
- ▶ Kenora
- ▶ Thunder Bay
- ▶ Regina
- ▶ Saskatoon
- ▶ All stations ran between 5 and 9 bonus ads



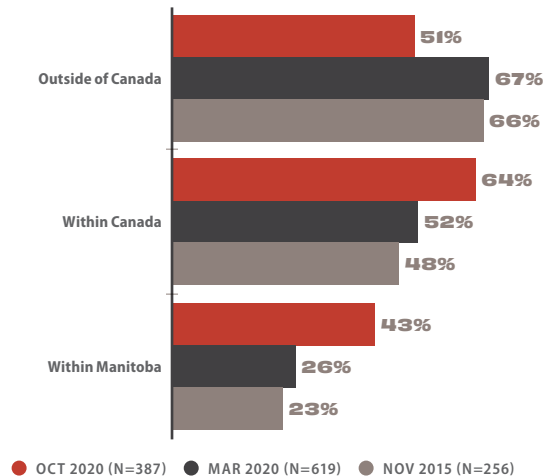
NEWSPAPER

- ▶ **Winnipeg**
 - Winnipeg Free Press campaign from July 11 to September 26
 - 9 full page partner advertorials and ads
 - 11 anchor banner on travel section
 - 6 sponsored content
 - 3 front page wraps
 - La Liberté featuring 4 insertions of Travel Manitoba brand ads/ partner advertorials in French
 - Rural newspaper campaign from July 15 to September 9 included 9 partner advertorial/and ads
- ▶ **Out of Home**
 - Outdoor static, digital horizontal and digital superboards for six weeks.
 - 9 communities in Manitoba
 - 69 purchased outdoor ads (including 3 French)
 - 10 bonus ads
 - Thunder Bay, Regina and Saskatoon
 - 64 purchased outdoor ads
 - 8 bonus ads

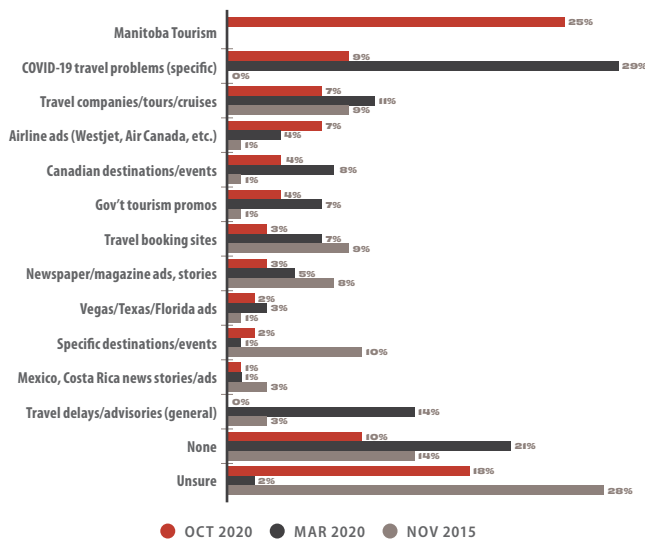
SURVEY TO EVALUATE HOME IS WHERE THE HEART IS CAMPAIGN

Travel Manitoba engaged Probe Research to evaluate the Home is Where the Heart is Campaign through a survey of 1000 Manitobans in October. Highlights include:

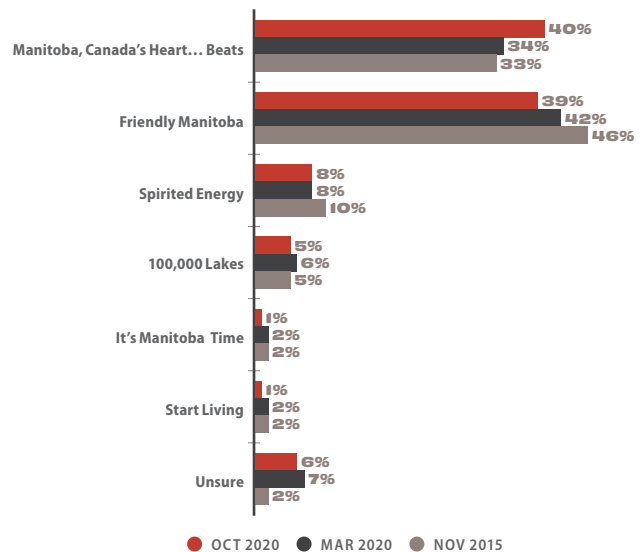
- ▶ 40% of Manitobans took a vacation in the province in the past six months. Nearly half of those said the pandemic was the reason they stayed in the province this summer.
- ▶ 43% of Manitobans intend to vacation within the province in 2021. This is significant increase in intend compared to similar surveys completed in March 2020 and November 2015 (see chart below).



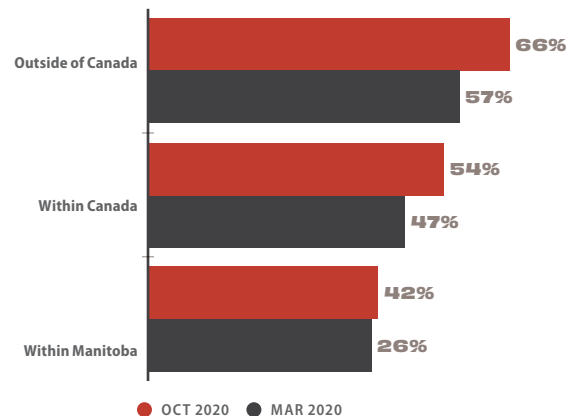
- ▶ 24% of respondents mentioned “Manitoba tourism” unaided when asked “What is the last advertising or news story that you read, saw or heard pertaining to travel destination of tourism opportunities?”. This is the first time “Manitoba tourism” has ever been tracked by this open-ended survey question which was also asked in surveys in March 2020 and November 2015. This is a clear sign that marketing messages for the Home is where the Heart is campaign broke through and reached consumer audiences.



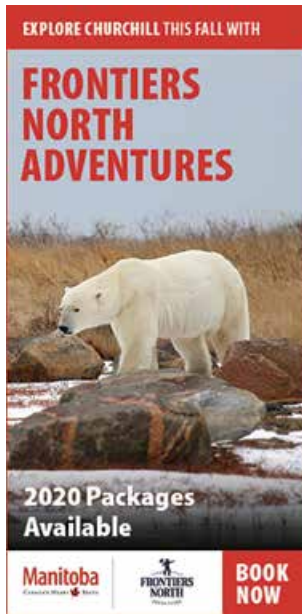
- ▶ For the first time ever, *Manitoba, Canada's Heart... Beats* was correctly identified as the provincial tourism slogan, finally edging out Friendly Manitoba.



- ▶ Respondents' perception of the importance of the tourism industry to the economic wellbeing of Manitoba increased considerably between March 2020 and October 2020, rising from 57% to 66%.







CHURCHILL PACKAGES CAMPAIGN

The polar bear season in Churchill was drastically impacted by the pandemic, with the loss of the destination's usual international visitors. In response, Travel Manitoba ran a brief but hard hitting campaign with specific packages and price points targeting Manitoba and Saskatchewan audiences. From late September to mid-October 2020, aggressive social media and digital campaigns drove users to a Churchill Packages page on TravelManitoba.com. Newspaper ads in the Winnipeg Free Press and Regina Leader Post during the same period promoted the same operator packages.

The campaign drove 2,682 clicks to book various packages pages hosted by the five participating Churchill partners, with results ranging from bookings of 40 passengers on a Churchill day tour with one operator, to 63 room nights booked with another.

Churchill Packages campaign results:

- Facebook post
 - 173K reach
 - 475K impressions
 - 7108 link clicks
- Facebook slideshow
 - 746K impressions
 - 237K reach
 - 42K thru plays

In addition to the Packages campaign, a Churchill Recovery digital campaign drove 98,158 session to the Churchill page of TravelManitoba.com's Explore Home hub, featuring Churchill partners that were open and operating. The campaign drove an additional 2,850+ clicks to our Churchill partners.



FALL/WINTER CAMPAIGN

In mid-November, rising case numbers of COVID-19 necessitated a second round of increased restrictions, with non-essential stores and restaurants limited to curbside pickup and delivery. Travel Manitoba ran several promotions focussed on encouraging Manitobans to buy locally.

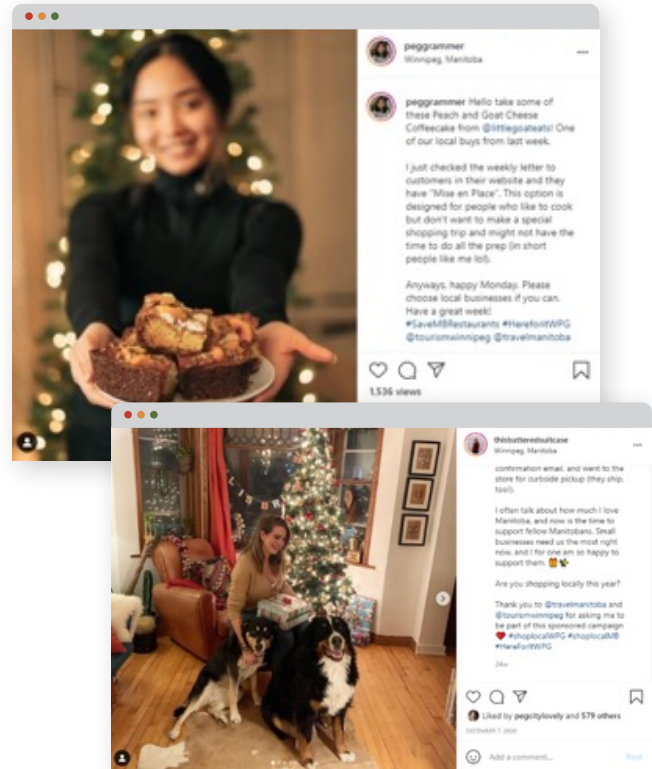
Travel Manitoba's Take the Pledge campaign encouraged Manitobans to order take-out or delivery from local restaurants at least once a week during the month of November. By taking the pledge, participants were entered to win a \$150 gift card to an independently-owned Manitoba restaurant. Over 13,000 people signed the pledge, and 30 gift cards were given away in November.

In addition, Travel Manitoba and Tourism Winnipeg engaged 31 local influencers/content creators in November and December to support local small business: #SaveMBRestaurants (November 15 – 30) and #ShopLocalMB (December 1 – 15, 2020). Fifteen participants selected a favourite local restaurant to support and showcase take-out dining. They produced creative, sharable social content (with the support local message) on their Instagram, YouTube or Facebook. Sixteen more local influencers/content creators were selected to showcase shopping/gifting local during the holiday season and posted inspired, creative content on their social media channels to help get the message out. A contest to support local shopping also saw 3,000 people enter to win \$150 gift card to their favourite local shop.

Travel Manitoba also produced the Manitoba Wishbook, a 30-page feature of local makers and shops, encouraging people to do their holiday shopping in Manitoba. The Wish Book digital campaign helped drive 41,750 unique visitors to the digital book, resulting in over half a million page views of local content.

A winter version of the "Home is where the Heart is" video was launched in January 2021. The video garnered 215,000 video views and 417,000 impressions on Facebook, and reached 880,457 views across its two video versions on YouTube thanks in part to a supporting digital campaign targeting Manitobans.

Throughout this phase, Travel Manitoba continued to update industry on the state of the tourism industry and its plans for the future. Over 200 tourism industry representatives participated in Travel Manitoba's virtual presentation during the annual Tourism Industry Association Congress on November 18, 2020.



In early 2021, Travel Manitoba launched the Great Manitoba Sweepstakes, which offered 10 prize packages to Canadians to encourage future travel this year. The campaign included full page ads in the Winnipeg Free Press, social and digital campaigns. The contest received over 28,000 entries and resulted in 19,000 new email subscribers to Travel Manitoba's e-newsletter.

The campaign drove 42,564 visits to the contest sign-up page. The Winnipeg Free Press print ad resulted in 3,878 page visits, considerably more digital engagement than any Winnipeg Free Press print placement to date.

► A campaign to encourage e-newsletter sign-ups through content on winter hiking generated:

- 3,500 new email subscribers
- 80.34% open rate
- 55.07% click through rate

► New content created for the winter campaign included:

- 12 romantic places to propose in Manitoba
- 9 spots to break out the skates this winter
- 6 totally Manitoban cakes and pies
- 8 Manitoba inspired holiday cocktails
- Local Manitoba gifts, in French
- Shop local with 20 amazing Manitoba themed gifts



Leading Marketing Excellence & Advancing Destination Management

PLACE BRANDING

As Travel Manitoba works to rebuild its tourism industry, targeting Manitobans to travel within the province and inviting visitors as border restrictions and travel regulations allow, one of the key initiatives to achieve this goal is the expansion of Travel Manitoba's successful Place Branding program. Emerging, demand-generating locations and experiences throughout the province can attract additional visitation with a compelling place brand and a strong supporting marketing program. Tourism businesses in these rural destinations need the support of strong place brand initiatives that will drive Manitobans, particularly Winnipeggers, to their locations. The program is also helping communities view their destinations through a different lens, generating a strong sense of pride of place.

NEW PLACE BRANDS

A virtual launch of a new place brand for The Pas/OCN was held March 1, 2021, and the launch of a new brand for Dauphin is expected late in 2021. Travel Manitoba and Tourism Winnipeg are working together on a late fall 2021 launch for a new Winnipeg brand that will serve as both a tourism brand as well as an economic development brand.

RECOVERY FUNDING INITIATIVES

Travel Manitoba provided one-time pandemic recovery assistance to all place brands, subject to the submission of a marketing plan to promote their destination. Funding was used for such initiatives as video production, photography, website upgrades, branded merchandise, street banners and wayfinding signage.

GATEWAY SIGNAGE

In 2020/21, Travel Manitoba initiated a project to establish gateway signage locations at each place brand destination. Working to identify locations, negotiating with land owners and designing the installations, this project will be completed in 2021/22.

PLACE BRAND SUMMIT

The third annual (and first virtual) Place Brand Summit was held on November 25, 2020. Representatives from all existing brands attended. Agenda items included place brand marketing adaptations in light of COVID-19, identifying opportunities with potential for growth, the status and success of recovery funding initiatives, market readiness and product development, and building one's brand. The summit, and the opportunity it provided for sharing of best practices, was well received by all participants.



MANITOBA 150

Travel Manitoba signed a new MOU with Manitoba 150 to provide marketing and promotion in late 2020 and 2021 of a re-activated campaign. This agreement includes:

- ▶ Re-activation of an Explore 150 app for iOS and Android
- ▶ Completion of French translation of the Explore 150 app in French
- ▶ A digital marketing campaign to encourage downloads of the app
- ▶ A social media campaign, including blog content and boosted posts
- ▶ Resumption of a suspended outdoor advertising buy
- ▶ Prominent advertising in all print publications produced in 2021



INTERNATIONAL MARKETING

The impact of COVID-19 on travel trade activities was significant. Many regular activities were postponed or cancelled. The travel trade team focused on keeping the Manitoba travel trade partners engaged and informed by hosting monthly meetings to update them on market updates, closures, traveller sentiment, tour operator feedback as well as unique situations by key target market.

UNITED STATES AND CANADA

The travel trade team participated in the following virtual trade shows. Each trade show offered virtual appointments with tour operators, networking activities and educational sessions.

- ▶ October 26-27: Bienvenue Quebec
- ▶ October 27-28: Student Youth Travel Association (STYA)
 - Meetings with 18 U.S. student tour operators
- ▶ November 9-10: Ontario Motorcoach Association (OMCA)
- ▶ November 17-19: National Tour Association (NTA)
- ▶ December 1-4: US Tour Operator Association (USTOA)
 - 26 meetings: 70% from the U.S., 30% from Canada
- ▶ December 4: Canadian Inbound Tour Operator Association-Asia Pacific (CITAP)
 - Virtual event with presentations from all Asia Pacific markets, as well as a networking component with key receptive tour operators and Manitoba operators.
- ▶ February 2-4: Virtuoso – North America Forum
 - 15 meetings with travel agents based Canada and U.S.
- ▶ February 4: Adventure Connect Come Together
 - One-day virtual event organized by the Adventure Travel Trade Association (ATTA)

The trade team also attended international trade webinars including National Tour Association, American Bus Association, United States Tour Operator Association, Student and Youth Travel Association, CONNECT TRAVEL, Travel Weekly, Destination Canada, Ignite, Virtuoso, Pulse Experiential travel, Adventure travel shows, The Outdoor show, Educational Travel Consortium and Jonview.

Travel Manitoba and Frontiers North Adventures hosted a trade FAM trip during bear season – “Women Travelling Together” from British Columbia. All other FAM trips were postponed to 2021.

Joint Marketing agreements were negotiated with TAUCK, Jonview and Discover Holidays.



GERMANY

- ▶ December: Kanada Fieber- SK Touristik Webinar
 - Presented “Manitoba/Churchill in the summer”.
- ▶ February 15-17: Destination Canada Virtual Event – “First dates with Canada”.
 - Each province was given an opportunity to provide the tourism industry current updates on what is new and exciting in their provinces.

UNITED KINGDOM, CHINA AND AUSTRALIA

- ▶ General sales agent contracts and marketing activities were paused.

RENDEZ-VOUS CANADA 2021

Planning began for a virtual Rendez-vous Canada to be held from May 17- May 20, 2021. This event was initially planned to be a hybrid event offering in person and online appointments, but due to the inability to bring buyers to Canada the event was subsequently changed to a virtual event only, offering online appointments. RVC Plus connected 560 buyers with 600 Canadian sellers.

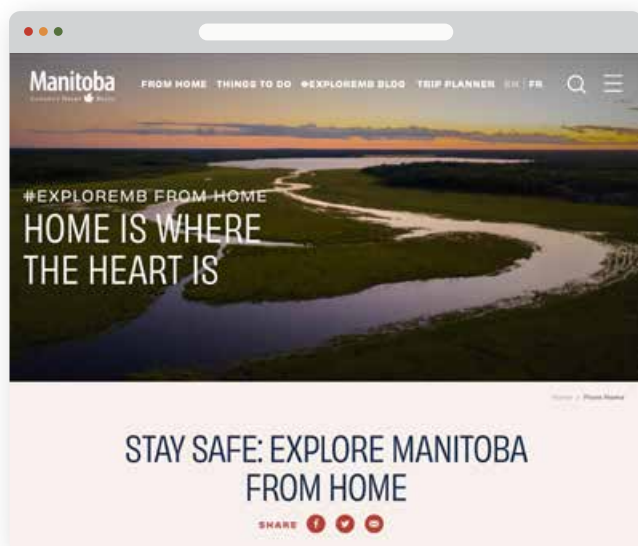
TRADE X

With representation on Destination Canada’s Trade X working group, Travel Manitoba was directly involved in the creation of a new recovery plan to assist Canadian businesses in working with international tour operators.

DIGITAL MARKETING

Over the past year Travel Manitoba's website, TravelManitoba.com (English and French) was updated and launched on January 5, 2021, complete with new copy, images and supporting microsites.

- ▶ Since the launch of the new website to the end of the fiscal year, the site saw immediate positive results:
 - Bounce rate decreased by 7%
 - Average session duration increased by 49% to over 01:48
 - Average pages per session increased by 22%
 - Site accessibility improved by 6.8 points
 - Site load time decreased to <1.5 seconds
- ▶ Other notable changes on the new website(s) include:
 - A new Trip Planner providing travel recommendations based on interests and demographics
 - More translated French blog content than ever before
 - A "Treaty Areas" page with information on Manitoba's Treaties, and additional treaty information throughout the website
 - Images showcasing a diversity of races, ages, abilities, sexualities, and genders



SITE VISITORS

From April 1, 2020 to March 31, 2021 TravelManitoba.com and its microsites saw 2,791,938 sessions from over 1,755,500 users. The majority of sessions—36%—were organic (not due to any paid campaign efforts), followed by sessions driven by social media (23%) and sessions driven by Travel Manitoba's paid digital campaign (19%).

TRAFFIC

With COVID-19 travel restrictions and the majority of our paid advertising targeting only Manitoba, it was not surprising to see 69% of our total site traffic (or 1,804,545 sessions) coming from Manitoba. The largest non-Canadian market was U.S. traffic, but the U.S. only accounted for 3% of overall site traffic (or just over 90,400 sessions).

Users from Winnipeg represented almost 43% of our total site traffic with over 1,230,523 sessions from 755,233 users in Winnipeg alone.

In addition to inspiring visitors with Manitoba content and experiences, TravelManitoba.com also helps drive traffic to the websites of our tourism partners. Between April 1, 2020 and March 31, 2021, TravelManitoba.com and its microsites drove 170,964 clicks to our on-site partners via a combination of listings, featured placements and other partnership opportunities designed to send business to our partners. Six percent of all site visitors continued on to our of our partners' websites, resulting in a 25% increase in outbound link clicks over the previous year.

CAMPAIGNS

In addition to focused seasonal and Churchill Recovery campaigns, Travel Manitoba's Digital Team ran over \$140,000 worth of multi-channel digital campaigns. These 11 partner-focused digital opportunities encompassed:

- ▶ Display Retargeting
- ▶ Urban Winnipeg
- ▶ Outdoor Adventure
- ▶ Golf
- ▶ Camping
- ▶ Museums
- ▶ Bed & Breakfast
- ▶ Tours
- ▶ Family Fun
- ▶ Culinary
- ▶ Winnipeg Packages

Collectively, these partnership campaigns earned over 41 million impressions and drove over 313,200 clicks directly to partners.

CONTENT MARKETING

SOCIAL MEDIA ENGAGEMENT

Social media metrics were heavily influenced by the pandemic and the resulting restrictions on posting that occurred during the spring of 2020. However, much of the decline was recovered during the summer with an aggressive campaign targeted at Manitobans. Marketing dollars were more heavily targeted to Facebook which resulted in higher impressions and engagements than 2019. For Instagram, a smaller share of budget was allocated, so the numbers remained slightly lower, although we saw an increase in engagement, likely due to targeting a Manitoba audience. The net result is very similar to the reach we achieved in 2019.

We saw an increased following across all channels, including TikTok which was launched in early 2019 and resulted in nearly 30,000 new followers – a major success when compared to follower accounts of other provinces also on the platform.

Significant strides were made to increase e-newsletter subscribers through contesting and targeted advertising. These users are considered one of our most valuable audiences due to the fact they have asked to receive our messaging in their inboxes. We have the ability to target their interests, find out what motivates them to open their emails and then deliver the content they are most eager to see.

BLOG EXPLOREMB.CA

September only due to data issue in October

- ▶ **1.6 million** page views (1.2M)
- ▶ **5.88%** average click-through-rate (7.09%)
- ▶ **3:47 mins** average time spent on page (3:35)

INSTAGRAM: 147,033 FOLLOWERS (127,710)

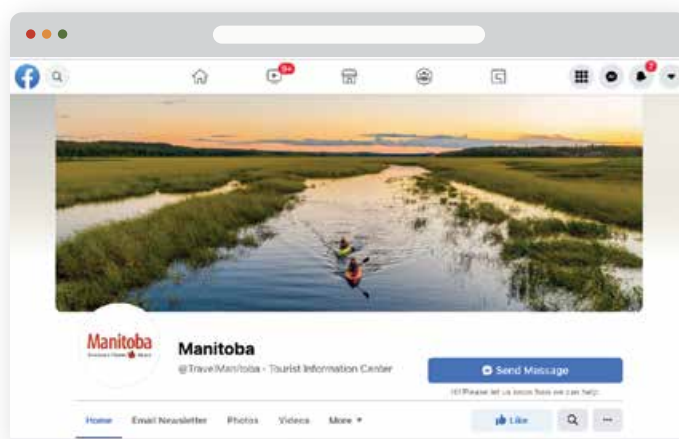
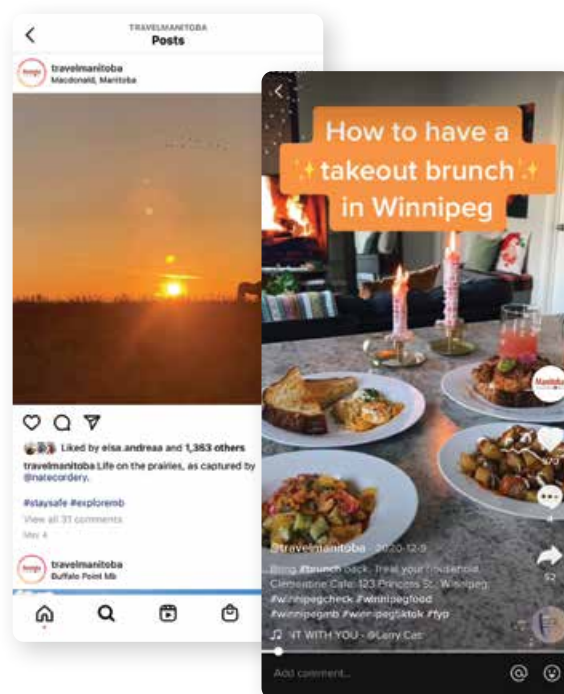
- ▶ **34.8 million** impressions (38.4)
- ▶ **855K** engagements (1.3M)
- ▶ **2.5%** engagement rate (per impression) (3.4%)
- ▶ **5.6 million** Instagram stories impressions (8.17M)

E-NEWSLETTER: 58403 SUBSCRIBERS (31,778)

- ▶ **28.48%** open rate (22.93%)
- ▶ **7.39%** click rate (6.78%)

TIKTOK: 28.9K FOLLOWERS (N/A)

- ▶ **205.5 K** likes



FACEBOOK: 134,993 FOLLOWERS (122,237)

- ▶ **129 million** impressions (73.3M)
- ▶ **3.8 million** engagements (2.1M)
- ▶ **1.4** link clicks (723K)
- ▶ **2.9%** engagement rate (per impression) (2.9%)

PINTEREST:

- ▶ **18.3 million** total impressions (1.8 M)
- ▶ **610K** engagements (70K)
- ▶ **3.33%** engagement (3.88%)
- ▶ **40%** Canadian audience (N/A)
- ▶ **20%** US Audience (N/A)

* 2019/2020 numbers in brackets

TRAVEL MEDIA RELATIONS

2020 Earned Media Coverage Summary

- ▶ **2301** total mentions
- ▶ **368.7M** audience reach
- ▶ **\$14.3M** ad value equivalent (AVE)

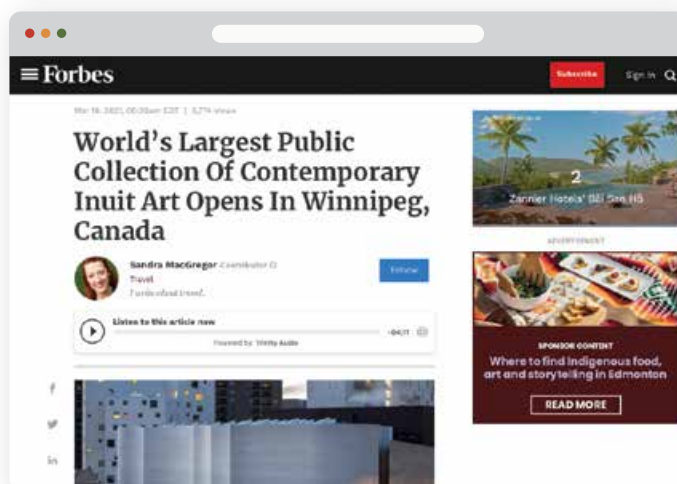
Travel Manitoba and Tourism Winnipeg hosted two virtual media events titled “Treat Yourself, Winnipeg-style” on December 8, 2020 and February 9, 2021. Canadian travel media were invited to learn about new tourism experiences in Winnipeg for 2021, as well as discover (and sample) treats from Winnipeg’s finest travel experiences. Thermëa, and Matolla Grocery at Hargrave Street Market were partners featured during this virtual event. The goal of virtual media events was to keep Winnipeg top of mind with these Canadian travel influencers, as well as to build/maintain relationships.

In total, 46 travel media attended the virtual events and each received a curated gift box from Winnipeg filled with Winnipeg treats, which they unboxed and sampled while watching videos and participating in a Q&A with our featured partners. The events were extremely well received from the travel media and resulted in a lot of Winnipeg content shared to their Twitter, Instagram and Facebook channels, as well as some blog posts.

On March 11, 2021, Travel Manitoba, Tourism Winnipeg and Winnipeg Art Gallery conducted two, one-hour virtual events to unveil Qaumajuq, the WAG’s new Inuit Art Centre, to travel and news media from Canada, U.S., U.K. and Germany.

250 media logged-in to hear speeches, watch videos and engage in a Q&A about Qaumajuq, resulting in over 197 articles or mentions published. To date, Qaumajuq has appeared in top-tier publications such as Forbes.com, The Smithsonian, CBC News National, Enroute, The Globe and Mail and Conde Nast Traveller.

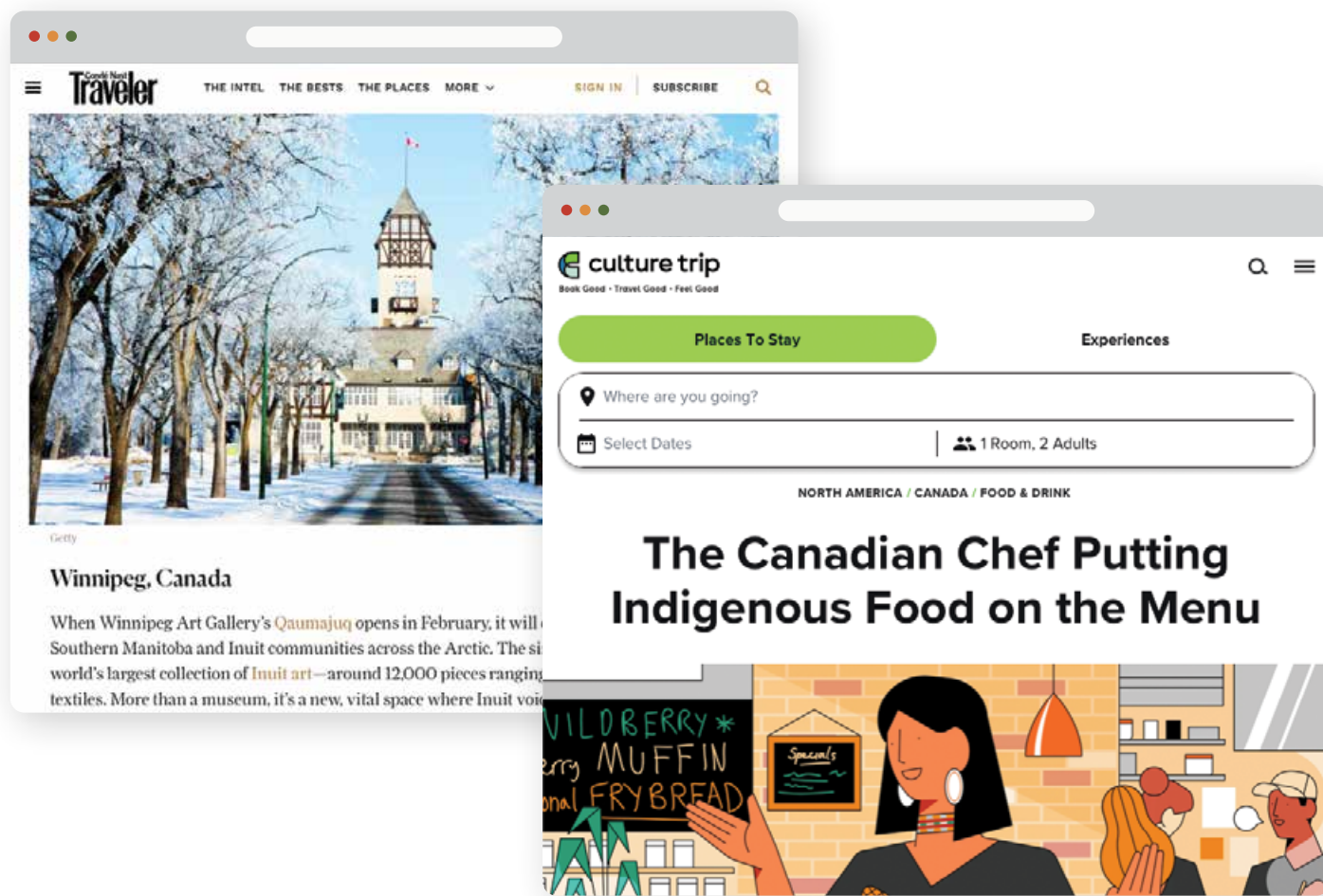
EXAMPLES



The travel media team also participated in the following virtual media marketplaces:

- ▶ International Media Marketplace (IMM) Germany, October 2020
- ▶ Society of American Travel Writers, October 2020
- ▶ IMM New York, January 2021

TOP 10 ARTICLE QUOTES AND EARNED MEDIA



Doing the Bump with the Belugas

"Pristine white bodies floated up elegantly from the depths, one after another, surrounding my kayak in the open water. Their ghostly pale faces with wide, Joker-esque smiles pushed closer. A long, powerful sound burst up through the air, like a slowly deflating balloon, followed by silence and more expectant staring. I was having a one-sided conversation with a pod of curious beluga whales." — Hillary Richard, *The New York Times*

21 best places to go in 2021: Winnipeg, Manitoba

"When Winnipeg Art Gallery's Qaumajuq opens in February, it will create a bridge between Southern Manitoba and Inuit communities across the Arctic. The sinuous building will hold the world's largest collection of Inuit art—around 12,000 pieces ranging from carvings and prints to textiles. More than a museum, it's a new, vital space where Inuit voices take center stage."

— Karen Gardiner, *Conde Nast Traveller*

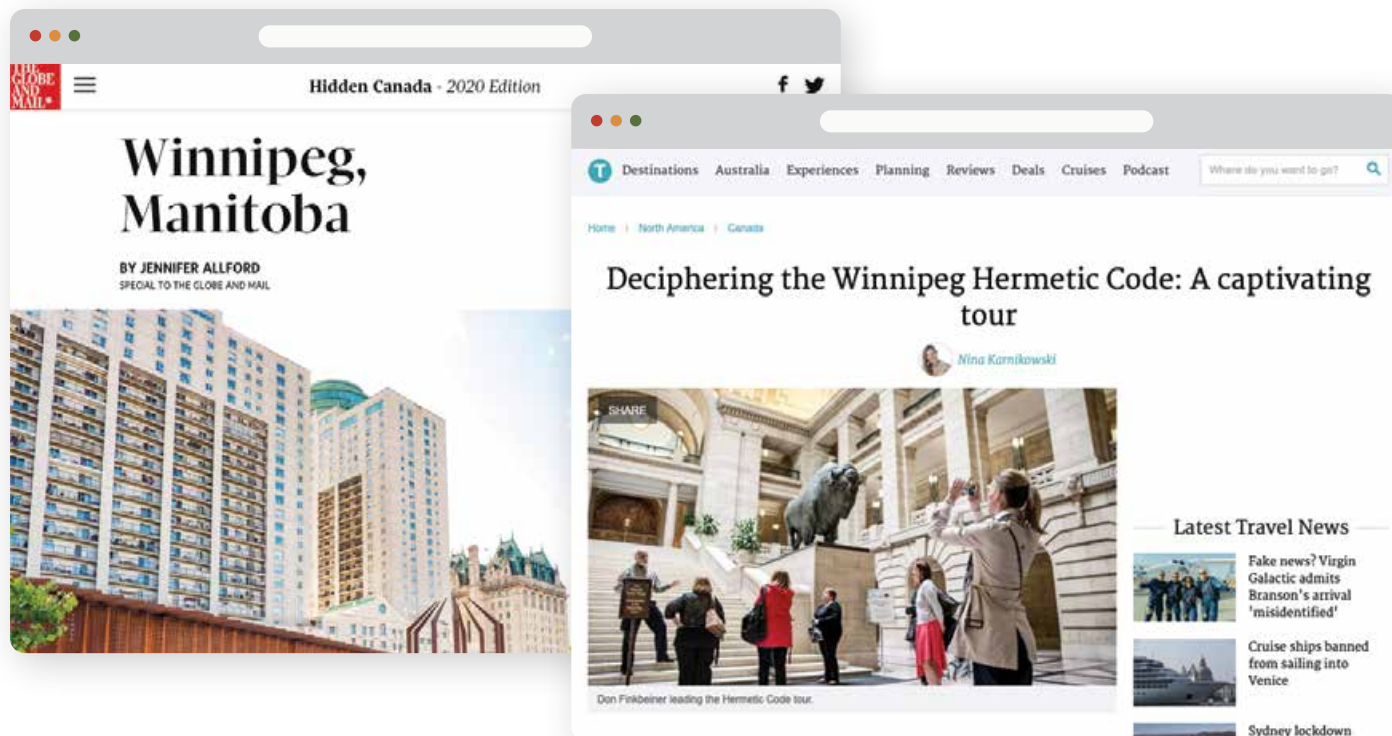
The Canadian chef putting Indigenous food on the menu

"Bruneau-Guenther started researching indigenous cuisine, speaking with the weewelders, meeting with community organizations and developing recipes... 'My staff were First Nations and there was a transformation among us, too, a sense of pride, self-discovery and healing through connecting with traditional foods and culture.'" — Shafik Meghji, *The Culture Trip (U.K.)*

Visit one of Canada's Coolest Cities

"It seems that everyone in Winnipeg is in on something. When I pass people commuting on skates on the River Trail, snowshoeing across a frozen lake under a full moon or strolling the streets of the Exchange District, I immediately notice how happy they are - even though it's February, with a daily high of -11 degrees Celsius."

— Dominique Lamberton, *EnRoute*



Same province, different world

"Churchill, with its sub-arctic landscape, can truly feel like a far off and exotic destination. Sometimes even another planet. Its appeal is legendary among international travellers but among Manitobans, it's remained one of those "I'd sure like to go up there one of these days" kinds of things. Make this year one of those days."

— Shel Zolkewich, *Winnipeg Free Press*

Zwei Tage im kanadischen Zug (Two days on a Canadian train)

"On the first day, the crops of Canadian farmers are presented: canola, barley, wheat, alfalfa. No hills, no mountains, no animals. Then on the second and third day: trees, followed by empty, vast tundra. At some point the slow travel effect sets in. Total relaxation. Letting go of time pressure and the desire to arrive. Meditation. I start to notice the nuances in the landscape, the barely noticeable transition to the Arctic wilderness." — Oliver Gerhard, *Die WELT (Germany)*

Winnipeg, Manitoba — the prairie city is a hub for exploring Indigenous artistic expression

"We get off our bikes at Niimaamaa, a giant sculpture of a pregnant woman facing east to symbolize rebirth and hope. "I am a proud Anishinaabe," says Adrian Alphonso, another of our guides on the Clear Paths tour. "I am able to finally say that I am proud ... and installations like these really ignite that." That sense of pride and healing is on display across Winnipeg, which is a hub of Indigenous art." — Jennifer Allford, *The Globe and Mail*

Deciphering the Winnipeg Hermetic Code

"My travel companions and I gather in front of the stately 1920s stone building and are introduced to our guide, a slight, sparkly-eyed gentleman with cotton-ball hair named Don Finkbeiner. I smile at him but really, I'm counting down the minutes until I can head to Winnipeg's Thermä spa. Finkbeiner's opening line, however, changes everything. 'This building in front of us is actually a temple in disguise.' Just like that, I'm hooked."

— Nina Karnikowski, *Traveller (Australia)*

Canada's Fantastic Five

"North America has beasts that are almost as magnificent as those animal lovers hope to see on African safaris. In Canada, the Big Five are said to be the black bear, moose, bison, beluga whale and polar bear. Travel there in the summer on Frontiers North's specialist guided trip to Manitoba province and you may be lucky enough to see them all — we did." — Wendy Gomersall, *Mail on Sunday (U.K.)*

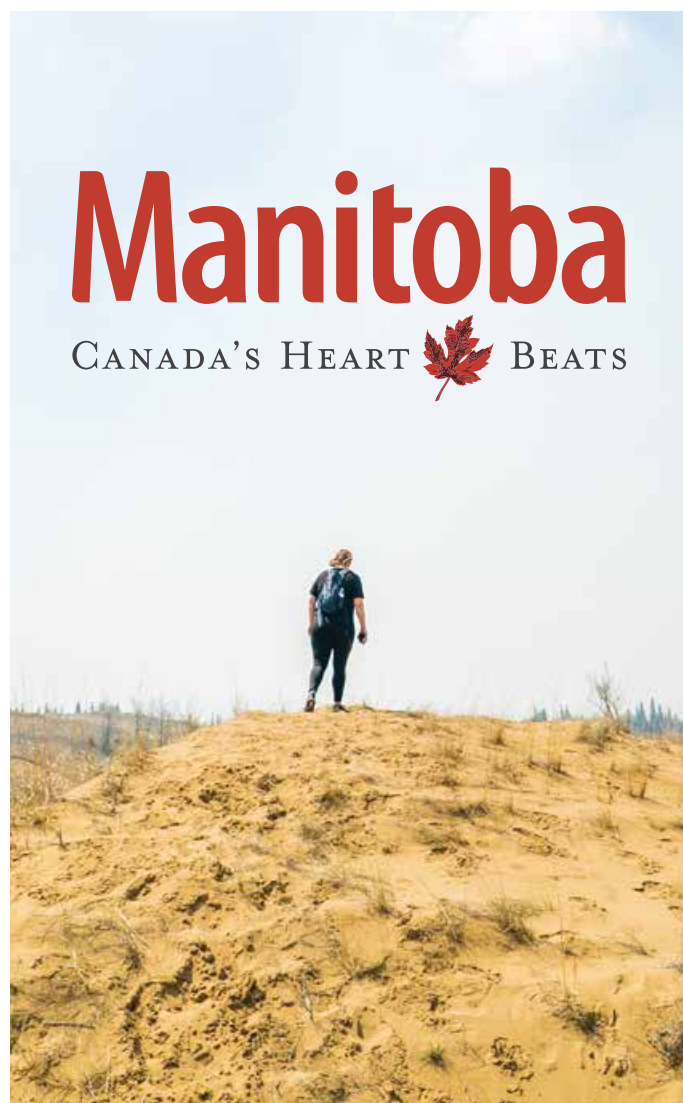
Shining Falls Lodge — where guests feel like family

"The best memory for all of us was the shore lunch Tobias prepared at the base of Shining Falls. With the raging waters and the roar of the rapids in front of us we watched him put together the walleye and multiple side dishes he placed before us - which made this one meal alone worth the visit." — Ron Pradniuk, *Winnipeg Free Press*

COMMUNICATIONS & BRANDING

The *Manitoba, Canada's Heart...Beats* brand continues to resonate strongly as the province's national and international signature. Coupled with compelling imagery of distinctive provincial experiences, the brand clearly differentiates and positions Manitoba in the visitor marketplace.

- ▶ In a March 2020 survey, respondents rate Travel Manitoba as appealing as a tourism destination.
- ▶ In the same survey, 30% of Manitoban respondents recalled receiving the Travel Manitoba Inspiration Guide and 64% indicated that it motivated them to consider a trip in Manitoba or find out more about Manitoba vacation options.
- ▶ In a November 2020 survey, 66% of Manitobans indicated they see Manitoba's tourism industry as very important for the economic well being of the province, up from 57% in March 2020.



BRAND ASSESSMENT

In November 2020, Travel Manitoba retained Stormy Lake Consulting to complete a brand assessment of the *Manitoba, Canada's Heart...Beats* brand. Both quantitative (surveys in key short- and long-haul Canada and U.S. target markets) and qualitative (focus groups in Saskatchewan and Alberta) data was collected in addition to interviews with travel trade representatives in international markets.

The report indicates the brand's image alignment – meaning how closely the brand delivers on its promises – performed well, reporting better results than Saskatchewan in this metric. Awareness of Manitoba, specifically Churchill, was high among the travel trade interviewed and 27% of distant U.S. respondents indicated they have some awareness of Manitoba as a tourism destination.

Focus group participants indicated that Manitoba offered an enticing variety of experiences, with Saskatchewan residents indicating a strong desire to visit for cultural attractions and experiencing different landscapes, including the Canadian Shield and top beaches.

"Winnipeg just seems like it's so much more there than either Regina or Saskatoon, just more to do, and just a better variety and more, more excitement." – *Saskatchewan Focus Group Participant*

"If you watch fishing shows and stuff like that, it's all about getting up to Manitoba to get the big fish." – *Alberta Focus Group Participant*

"The nature and the wilderness is a bit less touched." – *Alberta Focus Group Participant*

"It was just mind blowing, how beautiful [Manitoba] was...I would just love to come and hike around here, camp, fish, like all kinds of stuff. It was just breathtaking." – *Saskatchewan Focus Group Participant*

"It would be great to go into Winnipeg and experience a few things but be able to not drive very far and still have my time in nature and enjoy the landscapes." – *Saskatchewan Focus Group Participant*

With the completion of the assessment with Stormy Lake in March, 2021, the next steps include an analysis of key geographic markets and EQ types and the alignment of boulder, rock and pebble experiences that speak to travellers in those segments. As well, the brand's vision, mission and promise will be updated to reflect the findings of the assessment.

AWARD RECOGNITION

HERMES CREATIVE AWARDS

- ▶ Platinum: Design Publication Overall – *2020 Inspiration Guide*
- ▶ Gold: Social Video – *Beluga Whales in Churchill with Lazy Bear*
- ▶ Gold: Blog Overall – *Explore MB blog*
- ▶ Honourable Mention: Mobile App – *Explore 150 app*

TRAVEL WEEKLY MAGELLAN AWARDS

- ▶ Gold: Destinations Overall Blog – *ExploreMB Blog*
- ▶ Gold: Destinations Direct Mail – *2020 Inspiration Guide*

MARCOM AWARDS

- ▶ Platinum: Social Video – *Absence Makes the Heart Grow Fonder*
- ▶ Gold: Social Video – *Manitoba Through Your Lens*
- ▶ Honourable Mention: Writing Web Blog Overall – *ExploreMB Blog*

CONTENT MARKETING AWARDS

- ▶ Finalist: Best Use of Influencer Marketing – *Creator House*
- ▶ Finalist: Best Enewsletter – *The Beat*
- ▶ Finalist: Best Short Form Videos as Part of a Content Marketing Program – *Video Slideshows*
- ▶ Finalist: Hospitality/Travel Publication – *2020 Inspiration Guide*

WORLD MEDIA FESTIVAL

- ▶ Silver: Advertising Campaign: *Home is Where the Heart is (summer)*

COMMUNICATOR AWARDS

- ▶ Excellence: *Home is where the Heart is (Winter) commercial*
- ▶ Distinction: *Home is where the Heart is integrated campaign*

NYX VIDEO AWARDS

- ▶ Gold: Broadcast/Travel – *Home is Where the Heart is (winter) commercial*



FISHING AND HUNTING

Manitoba's fishing and hunting sector suffered significant losses during the 2020/21 year, largely due to the impact of the U.S. border closure, which closed off access to its largest and most loyal market. Long-time operators may not survive the prolonged closure.

ECONOMIC IMPACT ASSESSMENT

Travel Manitoba emphasized the importance of this sector in its discussions with provincial and federal governments. In order to better illustrate its financial importance to Manitoba's economy, Travel Manitoba conducted an economic impact study on the sector.

Probe Research completed the study in June 2020, and details the social and economic impacts of Manitoba's fishing and hunting industry in 2019. Such a detailed study had not been conducted since 2010. The study included surveys of licensed operators, anglers and hunters as well as a facilitated workshop

with members of the Manitoba Lodges and Outfitters Association (MLOA) to gather information on Manitoba's strengths, weaknesses, opportunities and threats.

The study shows Manitoba's hunting and fishing sector increased significantly between 2010 and 2019, with gross domestic product (GDP) impact increasing by 32% to \$412 million.

The number of lodges, outfitters and guides increased by 40% to 365, and the total number of hunting and fishing trips taken by license holders in Manitoba increased by 61% to 2.2. million. The average amount spent on tourism-related items by individual hunters and anglers in Manitoba increased by 23% to \$2,294.

SUMMARY OF KEY ECONOMIC INDICATORS	ANGLING	HUNTING	TOTAL
Total Hunter and Angler Spending <i>excludes capital spending, but includes trip-related spending on fuel, accommodation, meals, etc.</i>	\$268M	\$212M	\$480M
Employment <i>person-years, direct, indirect and induced</i>	2,992	2,519	5,512
Total Provincial Taxes Collected <i>income tax, PST</i>	\$56M	\$40M	\$96M
GDP Impact at Market Prices	\$216M	\$196M	\$412M
Total Direct Spending <i>including substantial outlays for capital items such as vehicles and boats</i>	\$601M	\$428M	\$1,029M

While the majority (78%) of hunting and fishing expenditures in the province were made by Manitobans, hunting and fishing lodges rely significantly on clientele from outside the province. For hunting lodges, 93% of customers are from out of province (89% international, 4% other Canada). For fishing lodges, 68% of customers are from out of the province (57% international and 11% other Canada).

Like all sectors of the tourism industry, the fishing and hunting industry has suffered this year due to the pandemic and resulting border closures, particularly the U.S. border. With hunting lodges reporting the majority of their clientele (89%) coming from outside of Canada, ensuring the survival of fly-in fishing lodges and hunting operations will be critical to the recovery of Manitoba's tourism sector.

The report makes a number of recommendations to mitigate the economic impact suffered by the industry, including

increased funding for wildlife and fisheries resource management, the management of unlicensed accommodations and unlicensed guiding, and development of small scale infrastructure (boat launches, improved roads, winter access).

The methodology used in The 2019 Economic and Social Impacts of Manitoba's Hunting and Fishing Industry differs from Statistics Canada visitor spending data used in the chart on page 3. The two datasets cannot be directly compared as a result.

Ice fishing is a key driver of economic growth. Anglers are ice fishing more in Manitoba now than they were five years ago (particularly younger adults), with 38% of respondents indicating they are ice fishing more than ever. Travel Manitoba made a significant investment in marketing Manitoba's world-class ice fishing experiences to anglers locally and further afield, and the resulting increase in off-season business contributed significantly to the economic viability of the sector before the pandemic.





FISHING AND HUNTING

INDUSTRY OUTREACH

Travel Manitoba held a facilitated focus group with ice fishing industry members in December 2020. The purpose of the session was to develop a plan for short-term and long-term survival, recovery and growth of the ice fishing sector in Manitoba. The session identified the need for:

- ▶ Clarification on health regulations and funding access
- ▶ Better engagement with municipalities and provincial parks to support the ice fishing sector with improved parking, snow removal and garbage pick-up
- ▶ The development of packages to encourage longer tourism stays and increased spending

Travel Manitoba provided four presentations at the MLOA AGM in December, including a marketing update, an overview of the Hunt Fish Economic Impact Study by Probe Research and an overview of preliminary insurance research.

CONTENT & MARKETING

Throughout the pandemic, Travel Manitoba continued to promote the fishing and hunting sector by focusing on creating and promoting content for future travel rather than an immediate call to action.

Travel Manitoba's Fish/Hunt team worked with fishing influencer Jay Siemens on the Complete Guide to Ice Fishing. The series accumulated over 200,000 views. The series was promoted on the HuntFishMB blog, Facebook and Instagram.

Travel Manitoba partnered with Manitoba lodges on destination media videos and a new ice fishing commercial. Video and editorial content was created to assist ice fishing operators in their seasonal promotion and increase stock content for future promotion.

HuntFishMB recipe videos were produced with Josh McFadden. Four ice fishing related fish recipes were captured for winter promotion and stock content.

IceFishMB merchandise was launched in December 2020. Demand for the merchandise line has been significant.

Travel Manitoba has been working with the Fisheries Branch on a future project to help educate anglers on a variety of fisheries related topics. Discussions have included a video and editorial series on proper fish handling, barotrauma, invasive species and a variety of other science-based fish facts. A production plan will be developed with fisheries staff, contractors and third party influencers in June.

SOCIAL MEDIA ENGAGEMENT

The public health restrictions associated with the pandemic also limited the ability of the Fish/Hunt team to actively promote travel to fishing destinations, resulting in a shift in the type of posts that could be shared. Without the use of paid post promotions, audience growth on Facebook was difficult to achieve.

Similarly, limited post selection on Instagram, and the absence of any paid ad campaigns, resulted in a decline in impressions, and yet, the number of followers increased by close to 25% over the previous year.

Both the number of new YouTube subscribers and the number of impressions increased over the past year, largely due to the success of Google and YouTube search directing traffic to our videos. Given the pandemic restrictions on travel, the team created new content styles for YouTube, which have been very successful and safe to share. These included HuntFishMB recipes, HuntFishMB Trip Tips, and CampFishCook MB.

▶ Facebook Impressions

20/21: 462K (1,67M)

▶ Facebook Followers

20/21: 30.8K (30,1K)

▶ Instagram Impressions

20/21: 827K (2.2M)

▶ Instagram Followers

20/21: 14K (11K)

▶ YouTube Impressions

20/21: 435K (411K)

▶ YouTube Views

20/21: 55K (160K)

▶ YouTube New Subscribers

20/21: 569 (512)

▶ YouTube Subscribers

2,240

**2019/2020 numbers in brackets*



↑ Nonsuch Brewing



↓ St. Boniface Cathedral

FRANCOPHONE TOURISM

Research has shown that tourists are looking for authentic Francophone cultural and historical experiences. Manitoba is in a good position to meet the demand for these types of experiences with many well established and events deeply rooted in the Francophone communities.

In 2020/21, Travel Manitoba engaged PwC to conduct an economic impact study of Manitoba's Francophone tourism sector, in coordination with Tourism Winnipeg, Tourisme Riel and CDEM. Both travellers and Francophone tourism businesses were surveyed, followed by a facilitated session to assess strengths, weaknesses, opportunities and threats facing the sector. The study, when completed, will form an important benchmark for Francophone tourism development in the province, identify barriers to growth and determine future product development opportunities.

Passion & HISTOIRE

SAINT-BONIFACE



↑ St. Norbert Famer's Market

INDIGENOUS TOURISM

Like all sectors of the tourism industry, COVID-19 significantly affected Manitoba’s Indigenous tourism industry. The full impact has yet to be determined, and further challenges lie ahead.

In collaboration with the Manitoba Indigenous Tourism Association (MITA) board and the Indigenous Tourism Association of Canada (ITAC), Travel Manitoba completed an update to the Manitoba Indigenous Tourism Strategy, which was originally launched in April 2019. Since that time, significant progress has been made, including:

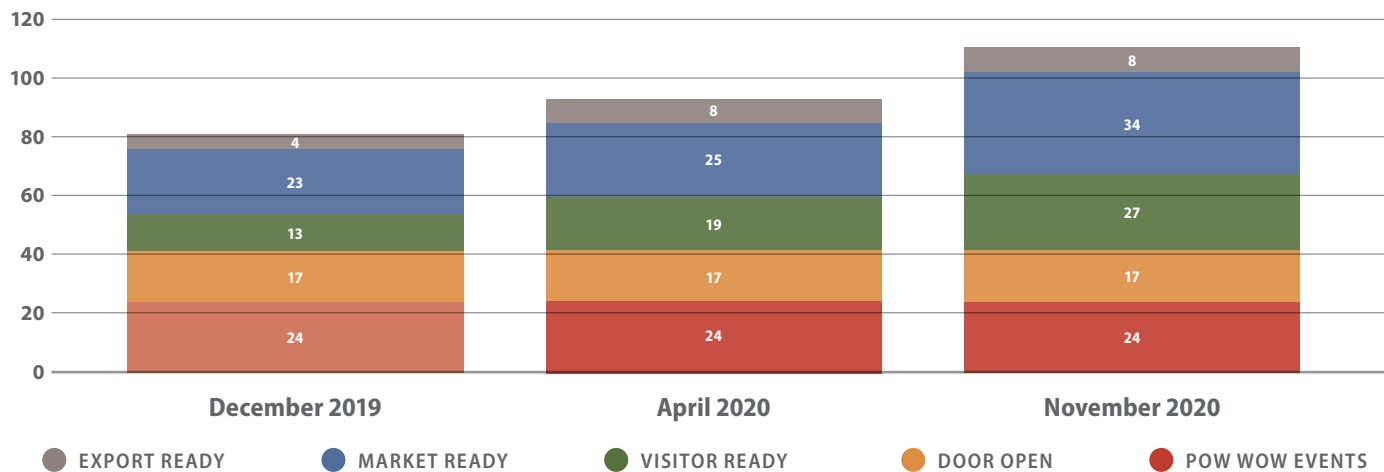
- ▶ Support for Indigenous business and product development, resulting in an increase in market-ready and export-ready Indigenous owned tourism experiences in Manitoba
- ▶ Over \$1 million in funding to Indigenous businesses in Manitoba for tourism development and COVID-19 recovery
- ▶ Development of the Adventure to Understanding brand in 2019
- ▶ Establishment of the Manitoba Indigenous Tourism Association in 2020
- ▶ Development of marketing content including photography, video and article assets

The updated strategy is based on significant research in the areas of COVID-19 recovery forecasting, industry trends and research on domestic and international market opportunities. Industry engagement over the course of the pandemic also identified valuable insights and direction. The updated strategy then formed the basis for a renewed Memorandum of Understanding between Travel Manitoba, MITA and ITAC that focuses on rebuilding the industry over the next three years.

The International Indigenous Tourism Conference, which was scheduled to be held in Winnipeg in September 2020 but was postponed due to the pandemic, will be held in Winnipeg in October 2022.



TOURISM READINESS OF INDIGENOUS TOURISM BUSINESSES IN MANITOBA



Building Support For Tourism

Travel Manitoba acknowledges and appreciates the support of the Manitoba government, as it recognizes tourism's role in economic recovery and in laying the foundation for broader economic development initiatives such as job creation and retention, infrastructure improvements and quality of life.

Throughout the pandemic, Travel Manitoba has been active in regular meetings with the Economic Development and Training department (now Economic Development and Jobs) of the provincial government, the Manitoba Chamber of Commerce and other economic agencies in provincial recovery planning. The impact of the COVID-19 pandemic on the tourism industry is well recognized.

At the federal level, Travel Manitoba advocated for pandemic relief funding with Western Economic Diversification on behalf of Winnipeg businesses at risk of closure because of reliance on meetings and conventions, as well as Churchill and fly-in remote lodges dependent on international clients. Western Diversification approved funding totalling \$1.45 million in funding support (\$800,000 to Travel Manitoba and \$650,000 to Tourism Winnipeg). Funding provided to Travel Manitoba included:

- ▶ \$250,000 to help Manitoba's fly-in fishing lodges pivot from their traditional reliance on the American market by aggressively marketing to Canadian anglers
- ▶ \$300,000 to stimulate recovery for Churchill and mitigate losses for the community
- ▶ \$250,000 to support key rural destinations with unique attractions





INDUSTRY RECOVERY SUPPORT

Given the state of the tourism industry, Travel Manitoba was not able to secure any incremental partnership revenues from industry in 2020/21. Travel Manitoba held webinars in February and March 2021 to offer industry partners (both in Winnipeg and in rural Manitoba) partnership opportunities at no cost as a means of recovery support. The webinars were well attended and the offer of support greatly appreciated.

RESTORING CONSUMER CONFIDENCE

Restoring consumer confidence and providing assurance to residents and visitors will be the critical challenge from a marketing and messaging perspective. To that end, Travel Manitoba initiated on-going discussions with the Manitoba Hotel Association, the Manitoba Food and Restaurant Association and the Manitoba Tourism Education Council (MTEC) to determine ways to restore consumer confidence and provide assurance to visitors. Travel Manitoba will continue to promote MTEC's "Clean It Right" program to industry and amplify their messaging.

ADVOCATING FOR AFFORDABLE INSURANCE

An additional challenge facing many in the tourism industry is the ability to access affordable insurance. To aid in its advocacy efforts, Travel Manitoba surveyed Manitoba's tourism sector to gather data on the impact of insurance challenges. General questions on COVID-19 impact as well as training needs were also included. Highlights of the survey included:

- ▶ 46% of respondents were concerned about remaining in business or avoiding business closure
- ▶ 38% of respondents indicated that the cost of liability insurance is a major inhibitor to business operations given the current pandemic environment
- ▶ 47% indicated that the cost of asset insurance is a major inhibitor to business operations
- ▶ 78% of respondents said they would be interested in considering other group or pooled insurance options for the tourism industry as a whole
- ▶ For 80%, insurance costs have increased over the past 5 years and for 29% they are expected to increase in 2021
- ▶ 54% of respondents expressed an interest in marketing related training to learn how to engage the right audience to promote products or services
- ▶ The biggest barriers to accessing training are not having the time to look for training opportunities (27%) and training costs too high (27%)

Research To Support Additional Tourism Growth

PROVINCIAL EVENTS STRATEGY

Travel Manitoba also initiated the development of a Provincial Events Strategy, beginning with an event attraction competitive analysis. MMGY NextFactor was engaged to conduct the analysis, which included:

- ▶ a review of industry trends,
- ▶ an assessment of event funding options and best practices in Canada and around the world,
- ▶ an assessment of Manitoba's key event assets and capacity for hosting events through stakeholder consultations,
- ▶ a competitive analysis for Winnipeg, Brandon and select rural communities, compared to other jurisdictions over the last five years,
- ▶ a competitive assessment for Manitoba including strengths, weaknesses, opportunities and threats.

The report on the analysis will be completed in early 2021/22.

IMPROVING THE VISITOR EXPERIENCE IN MANITOBA'S PROVINCIAL PARKS

In 2020, Travel Manitoba began a collaboration with Manitoba Conservation and Climate to evaluate the tourism growth potential of the province's parks. MNP was retained to complete a study to evaluate the visitor and user experience as well as a review of best practices in growing the visitor experience in Canadian and international jurisdictions. A final report is projected for completion in the summer of 2021.

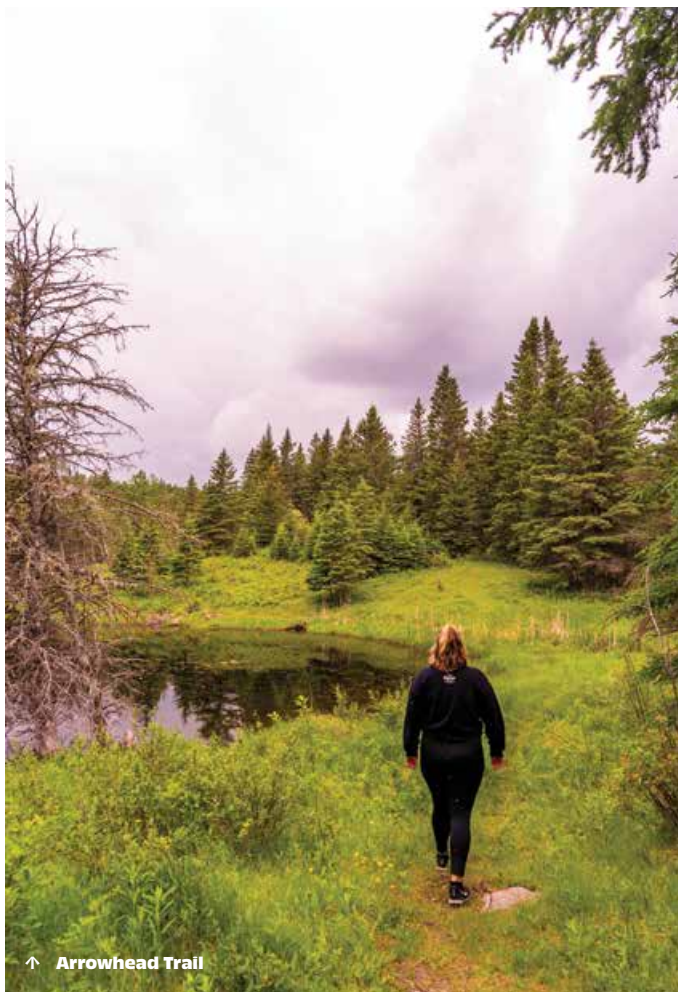
Travel Manitoba is also supporting Manitoba Parks in the creation of a new Provincial Trails Strategy. It is anticipated that this initiative will result in a comprehensive product development plan for many types of trails including cycling, walking, hiking, canoeing, snowmobiling and ATVs.



↑ Steep Rock



↑ East Blue Lake



↑ Arrowhead Trail

CAMPGROUND CAPACITY RESEARCH

During the summer of 2020, pandemic-related restrictions created an even greater interest in safe, outdoor experiences. Travel Manitoba conducted research on the capacity and services offered at Manitoba federal, provincial, municipal and private campgrounds. This work included a survey of private and municipal campgrounds conducted between April 27 and 30. The results were used to support Travel Manitoba marketing efforts. Key insights include:

- ▶ Manitoba has 194 campgrounds offering over 16,500 campsites. Between 39-45% of campsite capacity is seasonal.
- ▶ Average weekday occupancy in 2019 was 48% and 65% on weekends. Over the past five years, the occupancy rate has increased for 59% of survey respondents.

DOMO IMPLEMENTATION

Travel Manitoba worked with Rove Marketing to implement a data storage, analysis and dashboard visualization tool using the DOMO business intelligence platform. DOMO brings together most of Travel Manitoba's data into one place allowing the ability to compare data sets more easily to support decision-making. The platform also provides greater automation to many functions including partner reporting. One of the key objectives of the project is to create an improved dashboard for measuring performance.

SNOWBIRD MARKET

Travel Manitoba conducted research on the potential for targeting Manitobans who typically travel to warmer climates for the winter but stayed in Manitoba in 2020/21 due to COVID travel restrictions. In future marketing, this group – identified through the research as Authentic Experiencers who are wealthy and over 55 – may be targeted to vacation in Manitoba.

STR WEBINAR

In partnership with the Manitoba Hotel Association and STR, Travel Manitoba hosted a webinar focused on the hotel sector in November 2020. The webinar provided an overview of COVID-19 impact on the hotel sector, as well as an 18-month forecast and an overview of free data accessible to the hotel sector. The purpose of the webinar was to increase hotel participation in STR's data program to improve the overall quality of data for Manitoba's hotel sector.

TOURISM READINESS ASSESSMENT

Travel Manitoba developed tourism readiness criteria to assist Manitoba's tourism industry to remain competitive with other destinations and to pursue innovative continuous improvement strategies. Staff continue to reach out to tourism industry business owners to complete an assessment for each businesses. Over time, Travel Manitoba will be able to compare improvements in the tourism readiness of Manitoba's industry to gauge progress by sector.

DESTINATION CANADA DOMESTIC MEASURES WORKING GROUP

Travel Manitoba participated in the Destination Canada Domestic Measures Working Group. The working group developed the first national measurement and reporting framework to compare results from recovery marketing campaigns from across the country. Once fully implemented, the project will share consistent data of key results allowing an assessment of what content performs best across Canada, how Manitoba compares to other jurisdictions in terms of performance and how and where improvements can be made to improve results.

CULINARY AND WINTER/SHOULDER SEASON TIAC PARTNERSHIP

Travel Manitoba partnered with the Tourism Industry Association of Canada to conduct a series of online culinary and winter/shoulder season workshops in Manitoba. The first sessions were held with Brandon and Winnipeg participants on September 29 and October 1, 2020. The sessions focused on culinary tourism development, support for rural and secondary market tourism and bridging the gap between the food and beverage and travel sectors. The results of the winter/shoulder season sessions will support the development of Manitoba's winter strategy by gathering information on opportunities and challenges.

WINNIPEG WINTER STRATEGY FRAMEWORK

Travel Manitoba partnered with the Tourism Industry Association of Canada, Tourism Winnipeg and Twenty31 to develop a Winter Strategy Framework for Winnipeg through a series of facilitated workshops with industry leaders. The framework will guide experience development and marketing initiatives going forward.



EVALUATING THE INTEREST OF MANITOBBANS IN CHURCHILL TOURISM

In partnership with Probe Research, Travel Manitoba surveyed Manitobans between February 22 and March 9 to understand the local tourism potential for Churchill. Key results include:

- ▶ Only one-in-ten Manitobans has ever taken a pleasure trip to Churchill. Nearly one-half have never been, but would love to go. When asked specifically about this year, more than half of those open to visiting said they would be interested in visiting Churchill in 2021.
- ▶ Among those who have visited Churchill, the experience was overwhelmingly positive. Visitors reported a 97% satisfaction rate.
- ▶ Not surprisingly, money and transportation are the key barriers to visitation. Nearly four-in-ten cited cost as the top reason they have yet to visit Churchill.

EVALUATING THE INTEREST OF MANITOBBANS IN HUNTING AND FLY-IN FISHING LODGES

In partnership with Probe Research, Travel Manitoba surveyed hunters and anglers in Manitoba between February 19 and March 2 to understand the local tourism potential for hunting outfitters and fly-in fishing lodges. Key results include:

- ▶ One-half of the anglers surveyed have never been to a fishing lodge but would like to, and 40% of hunters were very interested in their first outfitted hunting trip.
- ▶ The experience lodge visitors have is overwhelmingly positive. Nearly eight-in-ten fishing lodge visitors were very satisfied with their last trip. Among hunters, 63% were very satisfied.
- ▶ Key barriers to visiting a lodge or hiring an outfitter revolved around cost and a sense the fishing and hunting is just fine closer to home or on their own.

Diversity, Inclusiveness and Anti-Racism Initiative

Travel Manitoba introduced a Diversity, Inclusiveness and Anti-racism Action Plan in June 2020. The plan outlines steps to be taken for internal training, improved human resources processes, reviewing policies, increased diversity amongst staff and the board, and a commitment to promoting education of these issues with our industry partners.

Travel Manitoba engaged the Manitoba Association for Rights and Liberties (MARL) to provide four virtual sessions for all staff. The training focused on understanding the issues surrounding diversity and equity in society and the workplace including learning about privilege, being an ally, conflict resolution, micro-aggressions, types of oppression and the evolution of language and human rights in Manitoba and Canada.

Over 200 industry participants attended Travel Manitoba's April 6–8 conference, "Diversity and Inclusion Matters: Fostering Understanding in Manitoba's Tourism Industry. Over three mornings, participants learned from a range to speakers what diversity, equity and inclusion is, and why it matters to the tourism industry. They were encouraged to broaden their awareness and take tangible actions to ensure Manitoba's tourism industry is embracing diversity, equity and inclusion as it relates to guests, customers and staff.

Travel Manitoba also undertook an extensive asset development project – both video and photography – that engaged BIPOC-owned and/or operated companies to collect new marketing assets that reflect the diversity of our communities in future marketing campaigns.



↑ West Hawk Lake
PHOTO BY MAY CONTAIN STUDIOS



↑ Fort Whyte Alive
PHOTO BY JP MEDIA WORKS



↑ Splash Island Waterpark, Portage la Prairie
PHOTO: VISUAL SOUL STUDIOS

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Partnership



Drew Fisher
President & CEO,
RBC Convention Centre



Obby Khan
President/Owner,
Goodlocal.ca/
Shawarma Khan Inc./
Green Carrot Juice

Our People

CEO's Office



Colin Ferguson
President & CEO
Travel Manitoba

Strategy & Business Development

Brigitte Sandron
Jackie Tenuta
Rebecca McKie
Melanie Swenarchuk
Yan Cong
Elise Wood
Michel LaRivière
Cindy Perrett
Lindsay Egan
Samantha Dawson

Nancy Evans
Taylor Bowman-
Robinson
Aaron McMahon
Glenda Sprowl
Jennifer Mallare
Tricia Woikin

Marketing & Communications

Linda Whitfield
Alexis McEwen
Nisha Tuli
Alex Krosney
Mark Remoquillo
Alysha Reutcky
Jillian Recksiedler
Tamara Soroka
Breanne Sowards
Kit Muir
Ryan Schultz
Douglas Evans
Ally Sigurdson

Financial Statements

For the year ended March 31, 2021

47 Management's Responsibility for Financial Reporting

48 Independent Auditor's Report

49 Financial Statements

- 49 Statement of Financial Position
- 50 Statement of Operations and Accumulated Surplus
- 50 Statement of Change in Net Financial Assets
- 51 Statement of Remeasurement Gains
- 51 Statement of Cash Flows
- 52 Notes to Financial Statements



↑ Zodiac Beluga Tour

Management's Responsibility for Financial Reporting

The accompanying financial statements are the responsibility of the management of Travel Manitoba and have been prepared in accordance with Canadian public sector accounting standards. In management's opinion, the financial statements have been properly prepared within reasonable limits of materiality, incorporating management's best judgment regarding all necessary estimates and all other data available to the audit report date.

Management maintains internal controls to properly safeguard the assets and to provide reasonable assurance that the books and records from which the financial statements are derived accurately reflect all transactions and that established policies and procedures are followed.

The responsibility of the external audit is to express an independent opinion on whether the financial statements of Travel Manitoba are fairly represented in accordance with Canadian public sector accounting standards. The Independent Auditor's Report outlines the scope of the audit examination and provides the audit opinion.

On behalf of Management:



Director, Corporate Services



President and CEO

June 17, 2021

Date

Independent Auditor's Report

To the Members of TRAVEL MANITOBA

Opinion

We have audited the financial statements of Travel Manitoba (the "Organization"), which comprise the statement of financial position as at March 31, 2021, and the statements of operations and accumulated surplus, change in net financial assets, remeasurement gains and cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Organization as at March 31, 2021, and its results of operations and its cash flows for the year then ended in accordance with Canadian public sector accounting standards.

Basis for Opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are independent of the Organization in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian public sector accounting standards, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Organization's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Organization or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Organization's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Organization's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Organization to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

BDO Canada LLP

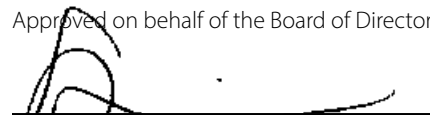
Chartered Professional Accountants

Winnipeg, Manitoba
June 17, 2021

TRAVEL MANITOBA
Statement of Financial Position

As at March 31	2021	2020
Financial Assets		
Cash and cash equivalents (Note 3)	\$ 2,647,579	\$ 2,437,263
Trade accounts receivable	39,287	705,526
Due from the Province of Manitoba (Note 4)	16,901	25,718
	2,703,767	3,168,507
Liabilities		
Accounts payable and accrued liabilities	1,538,775	1,694,701
Employee future benefits (Note 6)	607,586	621,320
Deferred revenue (Note 7)	-	260,500
	2,146,361	2,576,521
Net Financial Assets	557,406	591,986
Non Financial Assets		
Prepaid expenses	130,247	15,478
Tangible capital assets (Note 5)	102,881	165,280
	233,128	180,758
Contingencies and commitments (Note 9)		
Accumulated Surplus	\$ 790,534	\$ 772,744
Accumulated surplus is comprised of:		
Accumulated surplus (Page 50)	\$ 777,448	\$ 768,878
Accumulated remeasurement gains (Page 51)	13,086	3,866
	\$ 790,534	\$ 772,744

Approved on behalf of the Board of Directors:



Director



Director

The accompanying notes are an integral part of these financial statements.

Statement of Operations and Accumulated Surplus

For the year ended March 31	2021		2020
	<u>Budget</u>	<u>Total</u>	<u>Total</u>
Revenue			
Province of Manitoba	\$ 13,865,000	\$ 13,865,000	\$ 12,089,000
Partnership and leveraged marketing	260,000	43,949	1,176,805
Other initiatives - Federal and provincial funding	1,000,000	1,300,000	430,000
Other	50,000	80,336	82,304
	15,175,000	15,289,285	13,778,109
Expenses (Note 12)			
Marketing and industry relations	13,480,005	13,595,975	11,693,351
Corporate services	1,049,275	1,055,868	935,577
Visitor services	563,720	557,656	784,933
Amortization	82,000	71,216	107,581
	15,175,000	15,280,715	13,521,442
Annual surplus (deficit)	-	8,570	256,667
Accumulated surplus, beginning of the year	768,878	768,878	512,211
Accumulated surplus, end of the year	\$ 768,878	\$ 777,448	\$ 768,878

Statement of Change in Net Financial Assets

For the year ended March 31	2021		2020
	<u>Budget</u>	<u>Total</u>	<u>Total</u>
Annual surplus	\$ -	\$ 8,570	\$ 256,667
Acquisition of tangible capital assets	-	(12,618)	(19,225)
Amortization of tangible capital assets	82,000	71,216	107,581
Loss on sale of tangible capital assets	-	2,266	282
Proceeds on sale of tangible capital assets	-	1,535	1,000
Increase (decrease) in prepaid expenses	-	(114,769)	14,274
Increase (decrease) in remeasurement gains	-	9,220	(6,136)
	82,000	(43,150)	97,776
Change in net financial assets	\$ 82,000	(34,580)	354,443
Net financial assets, beginning of year		591,986	237,543
Net financial assets, end of year		\$ 557,406	\$ 591,986

The accompanying notes are an integral part of these financial statements.

TRAVEL MANITOBA
Statement of Remeasurement Gains

For the year ended March 31	2021	2020
Accumulated remeasurement gains, beginning of year	\$ 3,866	\$ 10,002
Unrealized gain (loss) attributable to foreign exchange	9,220	(6,136)
Accumulated remeasurement gains, end of year	\$ 13,086	\$ 3,866

TRAVEL MANITOBA
Statement of Cash Flows

For the year ended March 31	2021	2020
Cash Flows from Operating Activities		
Annual surplus	\$ 8,570	\$ 256,667
Changes in non cash items		
Amortization of capital assets	71,216	107,581
Loss on disposal of capital assets	2,266	282
Unrealized remeasurement loss	9,220	(6,136)
Due from the Province of Manitoba	8,817	8,364
Trade accounts receivable	666,239	(385,861)
Prepaid expenses	(114,769)	14,274
Accounts payable and accrued liabilities	(155,926)	512,728
Deferred revenue	(260,500)	12,974
Employee future benefits	(13,734)	105,462
Cash provided by operating transactions	221,399	626,335
Cash Flows from Financing and Investing Activities	-	-
Cash Flows from Capital Activities		
Acquisition of tangible capital assets	(12,618)	(19,225)
Proceeds on sale of tangible capital assets	1,535	1,000
	(11,083)	(18,225)
Net increase in cash and cash equivalents	210,316	608,110
Cash and cash equivalents, beginning of year	2,437,263	1,829,153
Cash and cash equivalents, end of year	\$ 2,647,579	\$ 2,437,263

The accompanying notes are an integral part of these financial statements.

For the year ended March 31, 2021

1. Nature of the Organization

Travel Manitoba was created as a Crown Corporation on April 1, 2005 under The Travel Manitoba Act as the culmination of extensive consultation and leadership from both the tourism industry and the provincial government. Travel Manitoba's mission is to increase tourism's contribution to the provincial economy by leading the marketing of Manitoba as a tourism destination by fostering a competitive and sustainable tourism industry. Travel Manitoba collaborates closely and in partnership with the tourism industry and governments to attract visitors to Manitoba, sustaining and creating jobs and businesses in the tourism sector in the province.

Travel Manitoba receives core funding from the Province of Manitoba to facilitate operations and to mobilize public and private resources to further foster the growth and professionalism of the tourism industry in Manitoba. Travel Manitoba is economically dependent on the Province of Manitoba because it derives a significant portion of its revenue from the Province of Manitoba.

2. Summary of Significant Accounting Policies

The financial statements are prepared in accordance with Canadian public sector accounting standards ("PSAS") as recommended by the Public Sector Accounting Board, and reflect the following significant accounting policies:

a. Financial Assets

Cash and cash equivalents consist of cash and short term deposits with a duration of less than ninety days from the date of acquisition.

Accounts receivable and amounts due from the Province of Manitoba are recorded at the lower of cost and net realizable value. An allowance for doubtful accounts is recorded when there is uncertainty whether the amounts will be collected.

b. Liabilities

Liabilities are present obligations as a result of transactions and events occurring prior to the end of the fiscal year. The settlement of the liabilities will result in the future transfer or use of assets or other form of settlement. Liabilities are recorded at the estimated amount ultimately payable.

c. Employee Future Benefits

The Organization provides retirement allowance and pension benefits to its employees.

Retirement allowances are provided to certain qualifying employees. The benefits are provided under a final pay plan. The costs of benefits earned by employees are charged to expenses as services are rendered. The costs are actuarially determined using the projected benefit method and reflect management's best estimates of the length of service, salary increases and ages at which employees will retire. Actuarial gains and losses are recognized in income immediately.

Employees of the Organization are provided pension benefits by the Civil Service Superannuation Fund ("the Fund"). Under paragraph 6 of the Civil Service Superannuation Act, the Organization is described as a "matching employer" and its contribution toward the pension benefits is limited to matching the employees' contributions to the Fund.

In addition, an individual has entitlement to enhanced pension benefits. The plan is based on final pay and is indexed. The cost of the benefits earned by the employee is charged to expenses as services are rendered. The cost is actuarially determined using the projected benefit method and reflects management's best estimate of salary increases and the age at which the employee will retire.

Sick leave benefits that accumulate but do not vest, are determined using present value techniques and reflect management's best estimate of future cost trends associated with such benefits and interest rates. Adjustment to these costs arising from changes in estimates and experience gains and losses are amortized to income over the estimated average remaining service life of the employee groups on a straight line basis.

d. Non-Financial Assets

Non financial assets are used to provide the Organization's services in future periods. These assets do not normally provide resources to discharge the liabilities of the organization unless they are sold. The Organization's non financial assets include prepaid expenses and tangible capital assets.

For the year ended March 31, 2021

e. Tangible Capital Assets

Tangible capital assets are recorded at cost less accumulated amortization and are amortized over the estimated useful lives of the assets at the following rates:

Computer hardware	30%, declining balance
Computer software	30%, declining balance
Furniture and equipment	5%, declining balance
Leasehold improvements	5%, declining balance
VIC technology	5 years, straight line
Vehicles	5 years, straight line

f. Revenue Recognition

Government transfers without eligibility criteria or stipulations are recognized as revenue when the transfer is authorized. Government transfers with eligibility criteria but without stipulations are recognized as revenue when the transfer is authorized and all eligibility criteria have been met. Government transfers with or without eligibility criteria but with stipulations are recognized as revenue in the period the transfer is authorized and all eligibility criteria have been met, except to the extent that the transfer gives rise to a liability.

Partnership and marketing revenue are recognized when services are rendered if the amount to be received can be reasonably estimated and collection is reasonably assured.

The Organization recognizes revenue arising from non monetary transactions in the period when services have been rendered if the amount to be received can be reasonably estimated and collection is reasonably assured.

g. Expenses

All expenses incurred for goods and services are recorded on an accrual basis.

h. Contributed Materials and Services

Contributed materials and services which are used in the normal course of the Organization's operations and would otherwise have been purchased are recorded at their fair value at the date of contribution if fair value can be reasonably estimated.

i. Measurement Uncertainty

The preparation of financial statements in accordance with Canadian public sector accounting standards for government not for profit organizations requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements, and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from management's best estimates as additional information becomes available in the future.

3. Cash and Cash Equivalents

The Organization invests all surplus cash into short term deposits with the Province's Treasury Division. These deposits are made up of 30, 60 and 90 day callable term deposits.

A dedicated account has been established to safeguard the Organization's retirement allowance obligation and enhanced pension benefit costs. Interest earned will be retained in the account. The balance at March 31, 2021 is \$127,497 (\$126,789 at March 31, 2020).

The Organization has a credit facility to a maximum of \$500,000 with interest at prime plus 1% (effective rate of 3.45% as at March 31, 2021) which is secured by a general security agreement. As at March 31, 2021, the facility remains unused.

4. Due from the Province of Manitoba

Upon inception on April 1, 2005, the Organization recorded accumulated severance pay benefits receivable and payable of \$368,937 transferred from the Province of Manitoba for its employees. This receivable, or portion thereof, for the Organization, will be collected by the Organization as severance benefits are paid to employees on record as at April 1, 2005. The receivable from the Province of Manitoba at March 31, 2021 is \$16,901 (\$25,718 at March 31, 2020).

Notes to Financial Statements

For the year ended March 31, 2021

5. Tangible Capital Assets

2021

	Opening Balance	Additions	Disposals	Closing Balance
Cost				
Vehicles	\$ 25,785	\$ -	\$ -	\$ 25,785
Computer hardware	79,482	7,579	7,166	79,895
Computer software	61,213	-	-	61,213
Furniture and equipment	33,544	5,039	-	38,583
Leasehold improvements	46,691	-	-	46,691
VIC Technology	439,650	-	-	439,650
	682,365	12,618	7,166	691,817
Accumulated Amortization				
Vehicles	12,893	5,157	-	18,050
Computer hardware	44,071	11,676	3,365	52,382
Computer software	54,236	2,254	-	56,490
Furniture and equipment	6,341	1,612	-	7,953
Leasehold improvements	19,097	1,380	-	20,477
VIC Technology	384,447	49,137	-	433,584
	521,085	71,216	3,365	588,936
Net book value	\$ 165,280	\$ (58,598)	\$ 3,801	\$ 102,881

TRAVEL MANITOBA
Notes to Financial Statements

For the year ended March 31, 2021

5. Tangible Capital Assets (continued)

	2020			
	Opening Balance	Additions	Disposals	Closing Balance
Cost				
Vehicles	\$ 25,785	\$ -	\$ -	\$ 25,785
Computer hardware	79,870	14,547	14,935	79,482
Computer software	61,213	-	-	61,213
Furniture and equipment	28,866	4,678	-	33,544
Leasehold improvements	46,691	-	-	46,691
VIC Technology	439,650	-	-	439,650
	682,075	19,225	14,935	686,365
Accumulated Amortization				
Vehicles	7,736	5,157	-	12,893
Computer hardware	48,980	8,744	13,653	44,071
Computer software	51,246	2,990	-	54,236
Furniture and equipment	5,033	1,308	-	6,341
Leasehold improvements	17,645	1,452	-	19,097
VIC Technology	296,517	87,930	-	384,447
	427,157	107,581	13,653	521,085
Net book value	\$ 254,918	\$ (88,356)	\$ 1,282	\$ 165,280

6. Employee Future Benefits

Retirement Allowances

The Organization measures its accrued benefit obligation for each of the retirement allowance and enhanced pension benefits as at March 31 of each year. The most recent actuarial valuation report for the retirement allowance was at April 1, 2021 and the most recent finalized and approved actuarial valuation report for the enhanced pension benefits was at December 31, 2019.

The significant actuarial assumptions adopted in measuring the Organization's retirement allowance obligation and costs are as follows:

	2021	2020
Benefit costs for the year ended March 31		
Discount rate	5.75%	5.75%
Rate of compensation increase	3.50%	3.50%
Employer contributions	\$ 192,407	\$ 280,136

For the year ended March 31, 2021

6. Employee Future Benefits (continued)

The significant actuarial assumptions adopted in measuring the Organization's enhanced pension benefit and costs are as follows:

	2021	2020
Benefit costs for the year ended March 31		
Discount rate	5.75%	5.75%
Rate of compensation increase	3.50%	3.50%
Employer contributions	\$ 17,301	\$ 17,038

Sick Leave

Sick leave benefits that accumulate but do not vest, are determined using present value techniques and are estimated to be a liability as at March 31, 2021 of \$48,000 (\$46,000 in 2020). The amount is not considered to be significant by management, and as such has not been recorded as a liability in the financial statements of the Organization.

7. Deferred Revenue

Deferred revenue represents payments received for partnership initiatives that pertain to a future period and will be recognized in the period in which the service is performed.

	2021	2020
Balance, beginning of year	\$ 260,500	\$ 247,526
Add amount received during the year	-	260,500
Less amount recognized as revenue during the year	(260,500)	(247,526)
Balance, end of year	\$ -	\$260,500

8. Financial Instrument Risk

The Organization is exposed to different types of risk in the normal course of operations, including credit risk and liquidity risk. The Organization's objective in risk management is to optimize the risk return trade off, within set limits, by applying integrated risk management and control strategies, policies and procedures throughout the Organization's activities.

Credit Risk

Credit risk is the risk that one party to a financial instrument fails to discharge an obligation and causes financial loss to another party. Financial instruments which potentially subject the Organization to credit risk consist principally of trade accounts receivable, due from the Province of Manitoba, and short term deposits.

The Organization's maximum exposure to credit risk is as follows:

	0–30 Days	31–40 Days	Over 60 Days
Trade accounts receivables (net of allowance of \$15,000)	\$ 15,895	\$ 50	\$ 23,342

For the year ended March 31, 2021

8. Financial Instrument Risk (continued)

Trade Accounts Receivables – The Organization is not exposed to significant credit risk as the accounts receivable are spread among a broad client base and payment in full is typically collected when it is due. The Organization establishes an allowance for doubtful accounts that represents its estimate of potential credit losses. The allowance for doubtful accounts is based on management's estimates and assumptions regarding current market conditions, customer analysis and historical payment trends. These factors are considered when determining whether past due accounts are allowed for or written off.

Due from the Province of Manitoba – The Organization is not exposed to significant credit risk related to these balances as there are underlying agreements to support their collection.

Liquidity Risk

Liquidity risk is the risk that the Organization will not be able to meet its financial obligations as they fall due. The Organization has a planning and budgeting process in place to help determine the funds required to support the Organization's normal operating requirements on an ongoing basis. The Organization ensures that there are sufficient funds to meet its short term requirements, taking into account its anticipated cash flows from operations and its holdings of cash and cash equivalents. To achieve this aim, it seeks to maintain cash balances to meet, at a minimum, expected requirements for a period of at least 90 days. The following table sets out the contractual maturities representing undiscounted contractual cash flows of financial liabilities:

	0–30 Days	31–40 Days	Over 60 Days
Trade accounts payable	\$ 1,537,337	\$ 98	\$ 1,341

9. Contingencies and Commitments

The Organization has entered into lease agreements for rental of facilities at various locations expiring in June 2035 with total annual payments of \$491,791. In addition, the Organization has entered into lease agreements for computer equipment expiring in December 2024, for total annual payments of \$18,923.

10. Non-monetary Transactions

During the current year, the Organization entered into contracts with exchanges of non monetary services for other non monetary services with little or no monetary consideration involved. These transactions are within normal business activities and were done in order to carry out the mandate of the Organization.

The aggregate amount of all non monetary transactions in the current year total \$3,000 (\$62,918 in 2020).

The Organization has not incurred any gains or losses in the current year with respect to these non monetary transactions.

11. Uncertainty due to COVID-19

The impact of COVID-19 in Canada and on the global economy increased significantly. For the Organization, there has been a decrease in revenue due to a reduction of advertising and uncertainties regarding future advertising. As the impacts of COVID-19 continue, there could be further impact on the Organization. Management is actively monitoring the affect on its financial condition, liquidity, operations, and workforce. Given the daily evolution of the COVID-19 outbreak and the global responses to curb its spread, the Organization is not able to fully estimate the effects of the COVID-19 outbreak on its results of operations, financial condition, or liquidity at this time.

Notes to Financial Statements

For the year ended March 31, 2021

12. Expenses by Function

	BUDGET	2021	2020
Communication	\$ 9,899,300	\$ 8,010,614	\$ 8,266,558
Personnel services	3,225,000	2,930,388	3,216,548
Grants/Transfer Payments	-	2,500,000	-
Supplies and services	1,200,000	1,378,545	1,053,587
Other operating	700,000	371,657	686,600
Transportation	50,000	3,567	172,521
Minor capital	18,700	14,728	18,047
Amortizaiton	82,000	71,216	107,581
	\$ 15,175,000	\$ 15,280,715	\$ 13,521,442



↑ Whiteshell River

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