

PROVINCIAL TOURISM STRATEGY FOR MANITOBA

Progress Report 2020



MANITOBA
CHAMBERS OF
COMMERCE



TABLE OF CONTENTS

3 INTRODUCTION

5 VISION

7 EXECUTIVE SUMMARY—2019–20 SUCCESSES

9 RESULTS

- 9** Goal 1 : Lead Brand & Marketing Positioning
- 19** Goal 2 : Invest in Destination and Experience Development
- 23** Goal 3 : Improve Transportation & Connectivity
- 27** Goal 4 : Foster Collaboration
- 31** Goal 5 : Build Public Support for Tourism

35 CONCLUSION

A landscape photograph showing a grassy field with several trees in the foreground and middle ground. The sky is filled with large, white and grey clouds, and the lighting suggests it might be late afternoon or early morning. The overall tone is natural and serene.

Acknowledgement

The Provincial Tourism Strategy for Manitoba encompasses communities that are located in Treaty 1, 2, 3, 4, and 5 Territories, the original lands of the Anishinaabeg, Anish-Ininiwak, Dakota, Dene, Ininiwak and Nehethowuk and the homeland of the Métis. Manitoba's ongoing existence is thanks to these ancestors and their present-day relatives, who continue to love and care for the land.

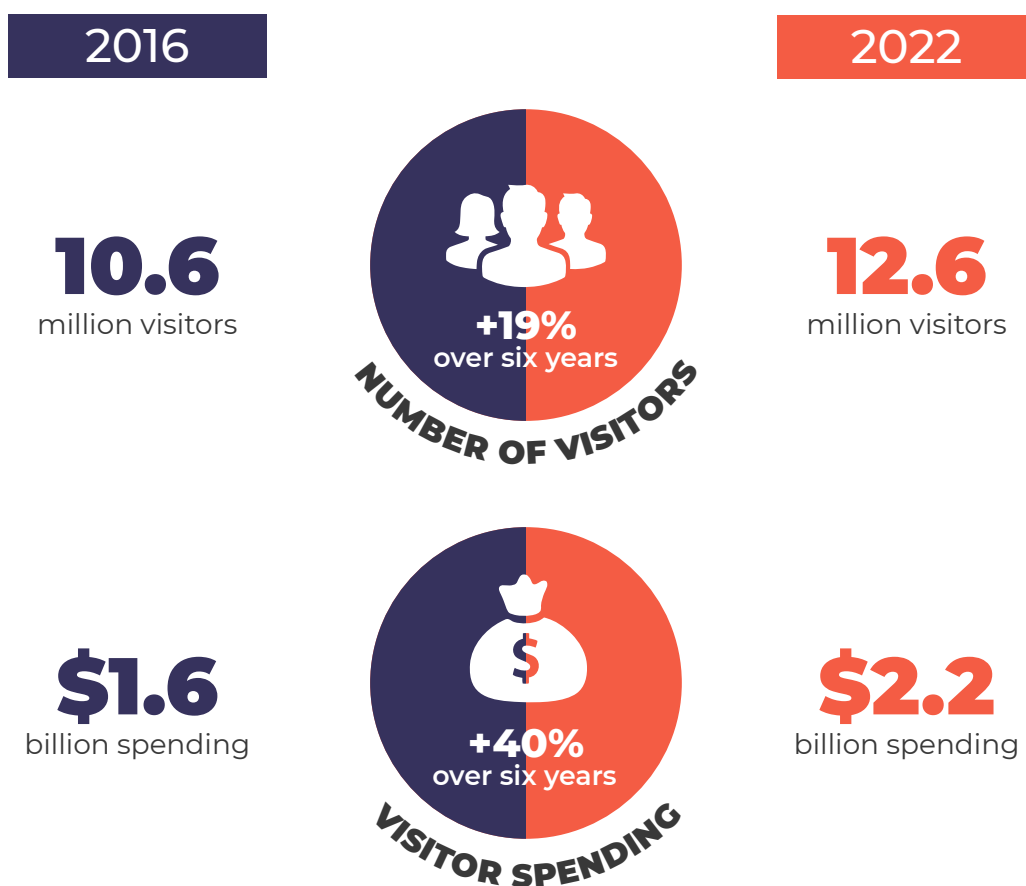


INTRODUCTION

In 2018, Travel Manitoba along with the Manitoba Chamber of Commerce and the Manitoba Government came together to create the **Provincial Tourism Strategy for Manitoba**. At the heart of this strategy is a new spirit of collaboration between the government— which committed to a whole-of-government approach to tourism, the private sector—led by the Manitoba Chambers of Commerce, and Travel Manitoba— whose mission is to increase tourism's contribution to the provincial economy. The strategy was built on consultations with industry stakeholders and core customers as well as a review of tourism industry trends that influence Manitoba's current and future visitors.

Officially launched in April 2019, this ambitious strategy proposed an increase of 19% to Manitoba's visitor target from 10.6 million to 12.6 million and a 40% increase in visitor spending from \$1.6 billion to \$2.2 billion by 2022. The implementation of the strategy is supported by a Steering Committee comprised of industry and government stakeholders that is co-chaired by Travel Manitoba and the Manitoba Chambers of Commerce.

The impact of COVID-19 on Manitoba's tourism industry is expected to be profound and pervasive. The situation is compounded by border restrictions and high overhead costs which leaves tourism businesses vulnerable and highly affected by the pandemic. While this report focuses predominately on the successes achieved in the first year of the strategy's implementation (i.e., pre-COVID), some projects have been impacted by the pandemic. As the industry shifts short-term priorities to focus on recovery, some initiatives will see expedited progress, while others will be delayed.



**Domestic day and overnight visitation growth rates were set at 2.9% annually, based on the Canadian Travel Market Research Institute's Travel Market Outlook for Canada (2017). U.S. and international day and overnight visitation growth rates were set at 3.3% annually, based on the World Travel & Tourism Council's Economic Forecast for Canada for 2017–2027.*

All initiatives, however, remain strategically important to the long-term viability and prosperity of Manitoba's tourism sector. The Provincial Tourism Strategy for Manitoba will be updated in 2020 to reflect this need for recovery based initiatives and revised targets.

Vision

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

Provincial Tourism Strategy for Manitoba Steering Committee Members

Stuart Murray (Co-Chair) — Travel Manitoba

Chuck Davidson (Co-Chair) — Manitoba Chambers of Commerce

Margaret Redmond — Assiniboine Park Conservancy

Paul Conchatre — Birdtail Waterfowl

Tara Stefansson — Lazy Bear Expeditions

Ginette Lavack — Centre culturel franco-manitobain

Dayna Spiring — Economic Development Winnipeg

Jeff Hnatiuk — Sport Manitoba

Gary Bell — Calm Air

Drew Fisher — RBC Convention Centre

Claudette Leclerc — Manitoba Museum

Jason Gobeil — Brandon Urban Aboriginal Peoples' Council,
Manitoba Indigenous Tourism Association

Philip Houde — Manitoba Economic Development Office

Rob Nedotiafko — Manitoba Sustainable Development

Barbara Barnett-Fontaine — Manitoba Infrastructure

Veronica Dyck — Manitoba Sport, Culture and Heritage

Executive Summary— 2019–20 Successes

Nothing will show Manitoba's resiliency, its resolve and its character like its return from the devastation of COVID-19. Fiscal year 2019–20 began with triumphs and tributes, as Manitoba continued to celebrate its designation as one of *Lonely Planet's* Top 10 regions to visit in the world, and ended the same as every other destination, forced to shutter its tourism industry as an unprecedented pandemic rages worldwide. Results for the year reflect that reality, as they will in 2020–21 and beyond. Nonetheless, we are proud of the significant achievements made during year one of the Provincial Tourism Strategy for Manitoba as recovery efforts now begin.





Results

The following section summarizes progress on specific strategies and tactics outlined in the Provincial Tourism Strategy for Manitoba

GOAL 1: LEAD BRAND & MARKET POSITIONING

1. Continue the *Manitoba, Canada's Heart...Beats* brand nationally and internationally as the provincial signature.

The *Manitoba, Canada's Heart...Beats* brand continues to resonate with travellers and visitors alike. Travel Manitoba is the premier destination content publisher in the province, and continues to create compelling video and engaging editorial content. The results are evident through increased engagement on all platforms.

2018–19

2019–20

BLOG

#Explore MB - Travel Manitoba's blog saw growth in users, sessions and engagement.



Total users: 468,261
Sessions: **662,503**
Engagement: 10.65%



Total users: 745,048
Sessions: **1,040,351**
Engagement: 11.19%

SOCIAL MEDIA

Social media reached more consumers in 2019–20.



Impressions:
77.3 million
Facebook engagement: 4.2%



Impressions:
104.9 million
Facebook engagement: 3.5%
Instagram engagement: 3.2%

VIDEOS

While the level of video production was slightly less (down 7.2%), which resulted in year over year lower views, our completion rate went up, meaning viewers were more engaged with what was produced.



Total views: 4.16 million
Full views: 807,900
Completion rate: **19.4%**



Total views: 3.1 million
Full views: 664,000
Completion rate: **21.41%**

NEWSLETTER

Newsletter reach and engagement increased substantially in 2019–20.



Total subscribers: **25,000**
Average open rate: 18%
Average click through rate: 2.78%



Total subscribers: **34,048**
Average open rate: 22.93%
Average click through rate: 6.78%

WEBSITE

TravelManitoba.com saw over 1.5 million unique visitors in 2019–20, a significant increase over 2018–19.



Travelmanitoba.com
Users: **1,161,142**



Travelmanitoba.com
Users: **1,580,724**

VISITOR INFORMATION CENTRE

Visitor Information Centre walk-ins declined in 2019–20. This is a trend seen in many other jurisdictions as visitors rely more on mobile phones and websites to learn about the destination.



Walk-ins: **180,000**



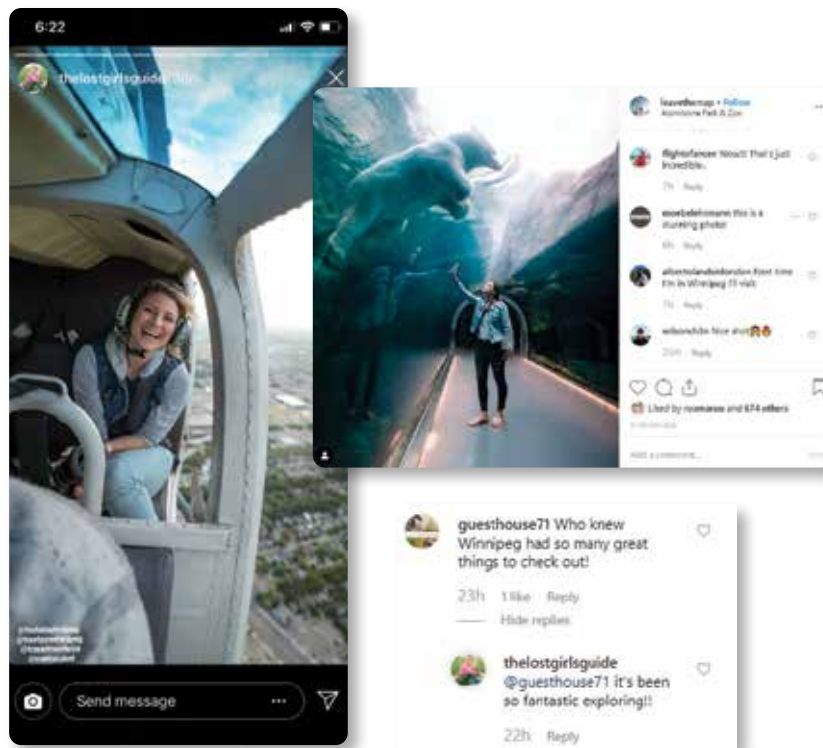
Walk-ins: **155,983**

Content Campaigns

Travel Manitoba entered a partnership with Creator House, a U.S. influencer-marketing agency. This partnership brought 14 influencers to Winnipeg. The 10-week project saw influencers visit the city each week of summer with one day of each trip dedicated to exploring rural Manitoba. The creators generated a series of videos, blog and social media posts.

Results:

- Blogs: 18 posts, 20K unique visitors, 19K page views
- Instagram: 64 posts, 44K likes, 411K reach
- Instagram stories: 893 stories, 691K reach
- YouTube: 1 video, 7K views
- Facebook: 64 posts, 89K reach, 12.6K clicks
- Twitter: 88 tweets, 239K impressions, 21K engagements
- Pinterest: 81 pins, 697 re-pins





Digital Marketing

Travel Manitoba continues to build engagement with relevant audiences across all digital platforms. Manitoba's target customer segments have been identified by the Environics PRIZM tool and are used to identify appropriate digital advertising methods. This has allowed Travel Manitoba to restructure the targeting strategy, connecting with the correct audiences across all channels and allowing us to target and compare specific segments across multiple campaigns and products.

User testing on TravelManitoba.com was completed to overwhelmingly positive reviews. To improve user experience, problem points were noted in the development an RFP for the new Travel Manitoba website. The new site will be launched in 2020–21.

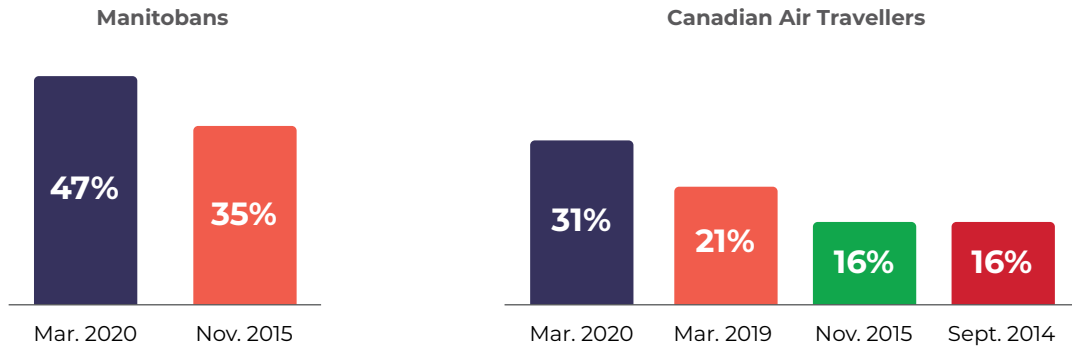
Post Ad Campaign Study—Manitoba & Canadian Air Travellers

In March 2020, Travel Manitoba surveyed Manitobans and Canadian air travellers. The surveys evaluated perceptions of Manitoba as a vacation destination, as well as awareness and impact of Travel Manitoba advertisements. Additional questions for Manitobans focused on the impact of Northern Manitoba marketing efforts and Travel Manitoba's Inspiration Guide. Key findings included:

- In 2020, 47% of Manitobans recall seeing the *Manitoba, Canada's Heart...Beats* ads, compared to only 35% in 2015.
- Canadian air travellers' recall of Travel Manitoba ads has also increased significantly, with 31% aware in 2020 compared to 21% in 2019.
- Significantly more Manitobans say Travel Manitoba ads have improved their opinion of Manitoba in 2020, compared to 2015 (48% in 2020 and 40% in 2015).
- 38% of Manitobans are aware of Manitoba tourism ads promoting Northern Manitoba and 43% feel that Northern Manitoba is appealing as a tourism destination.
- 30% of Manitoban respondents recall 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.

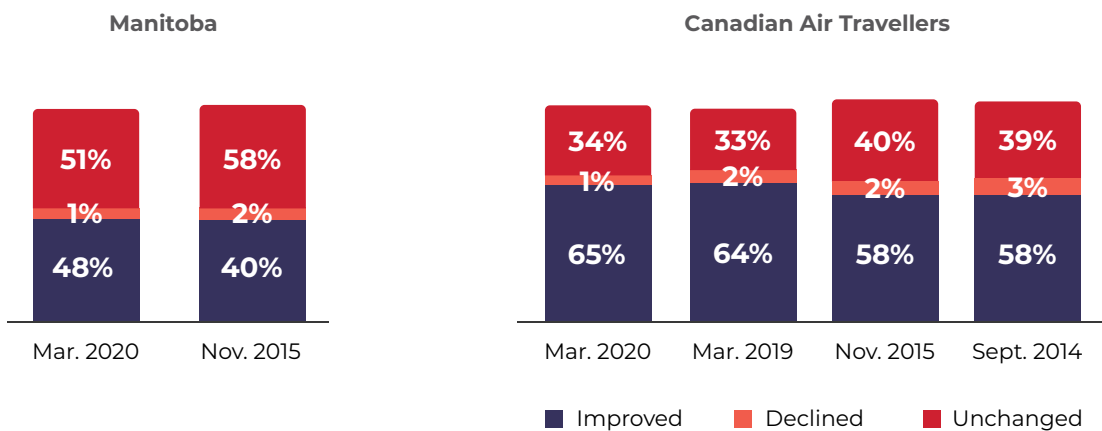
Awareness of Manitoba Tourism Advertisements - % Aware

"Have you previously seen this or similar advertising from the Manitoba, Canada's Heart... Beats campaign?"



Advertisements Impact on Opinion of Manitoba as a Travel Destination

"After viewing the video, has your opinion of Manitoba as a potential travel destination improved, declined or is it unchanged?"



2. Utilize the *Manitoba, Canada's Heart...Beats* brand to position and showcase Manitoba's:

- Indigenous and Francophone events and cultural exchanges
- Unique and vibrant four seasons, including Canada's home of exceptional and world-class winter experiences
- World class, water-based experiences such as fishing, paddling, lakeside relaxation

Travel Manitoba continued to develop blog, video and social content in 2019–20 showcasing Manitoba's unique Indigenous, Francophone, winter and water-based experiences.

Winter:

- Digital content was created in 2019–20 on all Travel Manitoba platforms to highlight winter experiences, including weekly blog posts detailing top winter activities and accommodations as well as three videos on winter attractions and events.
- The Northern snowmobiling integrated campaign (November 2019 to January 2020) targeted snowmobilers in southern Manitoba, including Winnipeg and Brandon, as well as Regina. A newsletter campaign and content piece to promote snowmobiling in the North was launched in partnership with Snorider magazine.

Francophone:

- Travel Manitoba continued to develop Francophone content and engage with Francophone audiences. Six blog posts per month were translated to French throughout 2019–20. A total of 45 bilingual blog posts and 12 unilingual French posts were developed. Three promotional Francophone videos were created. Travel Manitoba hosted a Festival du Voyageur display in the Forks Visitor Information Centre. Travel Manitoba met with six French tour operators at Rendez-vous Canada and as a result generated new interest in the province:
 - o Four French Travel Media familiarization tours
 - o Three familiarization tours for tour operators and travel agents who cater to French audiences and feature Francophone content
 - o Four new joint-marketing agreements with tour operators were implemented

Water-based:

- Using Envision Research, Travel Manitoba has improved its ability to analyze the fishing sector to determine where anglers reside and their demographics, travel motivations and media usage. Based on these findings, U.S. and Canadian customer targets have been identified for fly-in and drive-to fishing markets.
- Prior to the pandemic, production and promotion focused on ice fishing, destination and community-based content, promotions with various lodges, outfitters and accommodation partners. Northern region fisheries, Lake Winnipeg and Lake Manitoba received extensive ice fishing exposure on YouTube and with media partners in Canada and the U.S. Travel Manitoba participated in a second season of *39 Hours*, an online fishing challenge between provinces that airs on YouTube and has garnered a massive and enthusiastic following. Travel Manitoba participated through sponsorship and as well as being provincially represented. The second season of the show premiered in January 2020 and the final episode aired at a live event in Winnipeg, watched by over 990,000 viewers across Manitoba, Canada and the U.S.
- Travel Manitoba continues to collaborate with Destination Canada on the National Angling Program, a co-operative marketing partnership with Saskatchewan and British Columbia and supported at 2:1 funding by Destination Canada. Although 2020's promotion is paused, its focus was fly-in fishing destinations through integrated media channels in the U.S., with traffic direction to a landing page featuring operators.
- Paddling and lake enjoyment experiences were also featured in 2019–20 on Travel Manitoba's blog with articles on boating, paddling and swimming.

Indigenous:

In 2019–20, emphasis was placed on creating and sharing content that highlights Indigenous experiences through blog posts and video to inspire visitors. Travel Manitoba and the Indigenous Tourism Association of Canada (ITAC) collaborated on a video that tells the story of Buffalo Point Lodge, their collection of wild rice and how this contributes to the visitor experience. Travel Manitoba also developed an Indigenous Experiences landing page its website. Radio ads promoting the value of tourism in the North were produced and aired in English and Cree.

3. Support ongoing Place Branding initiatives throughout the province to elevate profile

To date, ten place brands have been created across the province: Clear Lake, Gimli, Brandon, Saint Boniface, Neepawa, Portage la Prairie, Morden/Winkler, Flin Flon, Thompson and Whiteshell Provincial Park. The second annual Place Brand Summit was held October 2–4, 2019, hosted by Clear Lake Country in Riding Mountain National Park. Representatives from all destinations that participated in the Place Branding Program attended the event that addressed topics, including but not limited to, securing community engagement, advertising, social media, working with influencers and events. A combination of Travel Manitoba staff, local speakers and out-of-province experts presented the well-received sessions.





Winnipeg: Travel Manitoba has been working closely with Economic Development Winnipeg/Tourism Winnipeg on the development of a new Winnipeg place brand. A brand platform has been approved by Travel Manitoba and EDW's board of directors as well as Mayor Brian Bowman. Two creative concepts have been focus-tested in Winnipeg and Brandon. Further focus testing is planned for external audiences including the consumer and meetings and conventions markets. The planned focus testing was interrupted by the COVID-19 pandemic and will resume as soon as possible.

Dauphin: A facilitated session was held in Dauphin for the development of a Place Brand in October 2020.

4. Support Winnipeg as Manitoba's leading national meetings, conventions, festivals and events destination

Travel Manitoba provides financial support to Tourism Winnipeg's meetings and convention program. Additional support is provided by promoting the province as a whole at various meeting planner and buyer events. In 2019–20, this included:

- Travel Manitoba attended the Incentive Travel Exchange show in Park City Utah in April 2019 and hosted meetings with 35 corporate planners.
- Travel Manitoba attended Incentive Canada in British Columbia in June 2019. Travel Manitoba met with 38 meeting planners and buyers.
- Travel Manitoba hosted incentive buyer Amy Black from the Wynford Group on a familiarization tour to Churchill in July 2019 to experience Churchill's beglua product and pitch the experience to several clients based in Toronto.

Due to the pandemic, many major events that Travel Manitoba and Tourism Winnipeg successfully secured have now been postponed. These include:

- The Student and Youth Travel Association Conference was secured for hosting in Winnipeg in August 2020.
- In partnership with the Indigenous Tourism Association of Canada, Travel Manitoba was to host approximately 800 delegates at the International Indigenous Tourism Conference in Winnipeg on September 29 – October 2, 2020. The conference is postponed to 2021.
- The Winter Cities Shake Up Conference was scheduled for February 2021 and has been postponed to February 2022.

5. Support Churchill as Manitoba's leading international destination for wilderness and wildlife experiences.

Travel Manitoba continues to support Churchill operators through a number of marketing initiatives. 2019–20 highlights include:

- Travel Manitoba updated EverythingChurchill.com, which was re-launched in December 2019, bringing this Churchill-specific web product into the TravelManitoba.com site as its own unique microsite.
- Travel Manitoba hosted influencer Kirsten Addis (@bemytravelmuse) for a 10-day trip in the province that covered Winnipeg in winter and the northern lights in Churchill.
- Several northern lights media familiarization tours from the U.S. and Australia took place during winter 2019–20.
- A 2019–20 U.S. northern lights campaign saw 46,479,000 impressions driving over 14,100 sessions to TravelManitoba.com and just under 4000 clicks to participating Churchill partners.
- A fall bears U.S. long-haul campaign saw over 16,600 sessions on TravelManitoba.com and 14,725 clicks to participating Churchill partners.

Number of International Tourism Operators Carrying Churchill Product		
	2018–19	2019–20
China	35	39
Germany	21	34
Australia	13	15
United Kingdom	19	40

Travel Trade Initiatives to Promote Churchill	2018–19	2019–20
Number of familiarization tours to Churchill	7	8
Number of Joint Marketing Agreements	10	13



GOAL 2: INVEST IN DESTINATION & EXPERIENCE DEVELOPMENT

1. Ensure the tourism industry has access to advice on business case formulation, market readiness, business development and funding sources.

Travel Manitoba has been working with entrepreneurs and organizations to develop market-ready products in Manitoba.

Success stories include:

- Opening of a snowmobile train link in the 2019–20 season between Snow Lake and Cranberry Portage.
- Travel Manitoba provided a design phase grant for Grace Lake Boardwalk and Trail in The Pas.
- Travel Manitoba provided support to Nanuk Operations, a new northern lights operator in Churchill.
- Travel Manitoba has worked with Northern hunting and fishing lodges to improve their marketing capacity and skills.
- Travel Manitoba invested in a feasibility study for the Canadian Fossil Discovery Centre.
- Travel Manitoba supported the development of a strategic plan for the Manitoba Lodges and Outfitters Association in 2019–20 and is working with the association to address key challenges facing the industry.
- Travel Manitoba is working with a number of lodges to winterize facilities to accommodate snowmobiling.

Travel Manitoba supported businesses interested in applying for the Manitoba Northern Initiatives Grant. Information about the grant was distributed to tourism industry stakeholders, application support was provided to three companies and general support was provided to eight additional inquiries.

In the early days of the COVID-19 crisis, Travel Manitoba developed toolkits for businesses on funding supports relevant to the tourism sector as well as re-opening best practices. Significant effort was made to engage industry by email, website and phone to identify industry needs, communicate funding options and clarify re-opening best practices.

2. Foster and expand Manitoba's world-class demand-generating experiences and attractions.

For example:

- Experiences: Winter, Indigenous, Francophone, Water-based (Fishing and Paddling), Human Rights
- Attractions: Canada's Diversity Gardens, Inuit Art Centre, Canadian Fossil Discovery Centre, Brandon's Riverbank Discovery Centre, Thompson's Boreal Discovery Centre.

In partnership with Indigenous Tourism Association of Canada, significant work was completed in 2019–20 in assessing the export-readiness level of authentic Indigenous tourism experiences in Manitoba.

Number of Authentic Indigenous Tourism Experiences in Manitoba		
	2018–19	2019–20
Export Ready	3	8
Market Ready	25	25
Visitor Ready	13	19
Doors Open	17	17
Pow Wow Events	24	24

A study to assess the export-readiness levels for Francophone tourism businesses was initiated in 2019–20. This project has been put on-hold due to COVID-19 and will be resumed once industry consultations can be completed.

An Economic Impact Study for the hunting and fishing sector was finalized in September 2020. Preliminary results from the study indicate that anglers and hunters spent more than \$1 billion (including capital and equipment purchases) in the province in 2019, adding \$412 million to the province's Gross Domestic Product.

Travel Manitoba provided the Boreal Discovery Centre with governance coaching and fundraising strategy support.

3. Facilitate sensitive, incremental, appropriate and sustainable tourism development in Manitoba's provincial and national parks year round

An RFP to review best practices in other international jurisdictions was issued in October 2020.

4. Develop a province-wide events strategy that maximizes the potential of Winnipeg and rural destinations to host meetings, conventions and major events.

An RFP for a province-wide event attraction competitive analysis was issued in October 2020.

5. Leverage the Year 2020 opportunity — Manitoba's 150th anniversary and Hudson's Bay Company's 350th anniversary — to promote new assets and experiences in Winnipeg and the rural communities

Travel Manitoba supported Manitoba 150 by developing the Manitoba 150 United in Celebration brand, developing the Explore 150 app and investing in marketing. Beginning April 8, 2020, all Manitoba 150 activities are on hold due to COVID-19.



GOAL 3: IMPROVE TRANSPORTATION AND CONNECTIVITY

1. Develop province-wide directional signage and wayfinding standards and enhancements within and between communities

Travel Manitoba worked with NextFactor to conduct a DestinationNEXT assessment for Manitoba in 2015 and 2019. This survey of tourism industry stakeholders measures perceptions of Manitoba's tourism strengths and community engagement. Manitoba rated very low for communication and Internet infrastructure, directional signage and multi-language wayfinding. In 2019, mobility and access was ranked second in terms of importance, but ranked tenth in performance with a score of 2.8/5 (industry average = 3.1). Under the mobility and access category, all variables ranked low including directional signage (2.7/5).

Travel Manitoba held an Innovation Café² in November 2019 with key government and industry stakeholders to discuss the need to develop the business case for a provincial wayfinding strategy. Several challenges to Manitoba's current wayfinding capabilities were identified. These include inconsistent and out of date signage, low levels of Wi-Fi and cellular service in rural areas, low technical and funding capacity among some tourism assets and a lack of vision and coordination for wayfinding within the province.

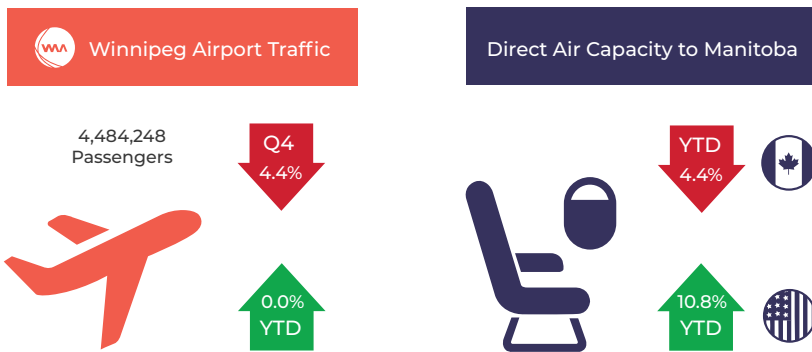
A request for proposals was issued in January 2020 and awarded to Entro Marketing. By March 31, 2020, Entro had completed a preliminary examination of wayfinding best practises and examined provincial and municipal regulations. The project is currently paused until COVID-19 isolation guidelines are removed and industry consultations can be completed.

² Travel Manitoba regularly holds Innovation Café sessions throughout the year. These sessions are consultative, strategic and innovative brainstorming sessions with stakeholders from a specific sector or area.



2. Maximize direct air access to Winnipeg, Brandon, Thompson and Churchill

Direct air access to major destinations in Manitoba remained a challenge in 2019–20 and will remain a significant challenge post-COVID. Winnipeg air traffic overall remained unchanged for the 2019 calendar year compared to 2018. Direct air capacity to Manitoba increased by 10.8% from the U.S. in 2019, but decreased by 4.4% from Canadian locations.



Data Source: Winnipeg Airport Authority

Data Source: OAG (Domestic & International Non-stop Seat Capacity)

3. Pursue additional transportation and access options in Winnipeg and other centres including:

- Ride share vehicle networks, attractions-based hop on/hop off bus circulator services
- Public bike rentals, bicycle lanes, pedestrian walking paths, public access to rivers/lakes
- Bus service to rural areas

An Innovation Café³ was held on the feasibility of a hop on/hop off service in Winnipeg. A hotel survey was developed to assess the market opportunity, but not implemented because of COVID-19. Discussions took place with potential providers for a Winnipeg to Riding Mountain National Park transport service.

4. Ensure reliable cellular service on major highways and high-speed service/Wi-Fi in communities and parks

On May 15, 2020, the Province of Manitoba announced that is issuing a tender to see broadband and cellular coverage in rural and Northern Manitoba using the existing fibre optics network.

5. Restore train access to Churchill and utilize existing rail infrastructure for tourism purposes

Limited service has been restored. Via Rail suspended service to Churchill between May 6 and early June due to COVID-19.

6. Improve transportation between rural and remote Northern communities

No improvements to transportation between rural and remote Northern communities were identified in 2019–20.

³ Travel Manitoba regularly holds Innovation Café sessions throughout the year. These sessions are consultative, strategic and innovative brainstorming sessions with stakeholders from a specific sector or area.



GOAL 4: FOSTER COLLABORATION

1. **Travel Manitoba and Tourism Winnipeg to renew discussions on optimizing partnerships and to clarify roles, responsibilities and accountabilities**

Significant progress was made in the development of a Winnipeg brand in 2019–20. Several facilitated sessions were held to gain input from business and community leaders on the brand. A tourism industry survey and Winnipeg citizen survey were conducted as part of this process to gain additional insights for the brand personality. Two creative concepts were developed and tested through focus groups with Winnipeg and Brandon audiences. Work on the brand is currently on hold due to COVID-19. Additional focus groups in key target markets will take place once this is possible.

2. Assess the merits of a new approach to delivering regional tourism initiatives

Travel Manitoba completed an investigation of best practices in regional tourism development in 2019-20.

3. Ensure a whole-of-government approach to tourism as a key economic sector, and maximize alignment between all provincial government departments and agencies to:

- Pursue improvements to road networks, wayfinding via signage installations and digital networks and key provincially-owned buildings (e.g. the Manitoba Museum);
- Expand park operating seasons and enable sustainable development and expansion of parks-based facilities and amenities;
- Enforce province-wide operator licensing and service standards.

Travel Manitoba continues to build relationships with government departments and crown corporations at national, provincial and municipal levels to encourage a whole-of-government approach to tourism as an economic sector. Travel Manitoba has been recognized for the role it plays in developing the provincial economy and has been asked to be a strategic partner in Manitoba's Economic Growth Plan. Provincial ministerial mandate letters identified several priorities that are consistent with the Provincial Tourism Strategy, a clear sign of improved alignment and coordination. These priorities include wayfinding, a new model for parks and events as priorities. In addition, Manitoba Provincial Parks, Manitoba Infrastructure and Manitoba Sport, Culture and Heritage are active participants in the Provincial Tourism Strategy Steering Committee. Manitoba Sport, Culture and Heritage along with Manitoba Infrastructure are also active participants in the wayfinding business case study (currently on hold due to COVID-19).

4. Collaborate with Parks Canada to expand national park operating seasons in Manitoba and to enable sustainable development and expansion of national parks-based facilities and amenities.

Communication with Parks Canada continues at the provincial and national levels. The existing partnership with Destination Canada supports the development of new experiences through the Canadian Signature Experiences program, where Parks Canada also has a seat at the table. This program encourages the development of new experiences at Parks Canada sites within the province.

Travel Manitoba attended a Canadian Signature Experiences meeting in February hosted by Destination Canada.

A new Tourism Association of Canada (TIAC) partnership was formed in 2019–20 with the goal of hosting several sessions on culinary and winter/shoulder season experience development. These sessions were initially postponed due to COVID-19 but are planned to resume in the fall of 2020.

These combined activities are intended to encourage an expanded operating season with sustainable development and an expansion of amenities both within parks and across the province of Manitoba.



5. Collaborate with Indigenous, Francophone and other communities on tourism marketing and economic development opportunities

As part of Travel Manitoba's MOU with the Indigenous Tourism Association of Canada (ITAC), a number of projects were advanced in 2019–20:

- The Manitoba Indigenous Tourism Strategy was launched on April 24, 2019.
- Travel Manitoba developed the Adventure to Understanding brand in partnership with ITAC.
- Over 55 industry representatives attended the second annual Manitoba Indigenous Tourism Summit in Winnipeg on September 27, 2019. The Summit provided Indigenous operators with updates on ITAC programs, professional development opportunities and results in the creation of one, two and three day itineraries.
- A Manitoba Coordinator for ITAC was hired in September to focus on product development. The Coordinator has worked to assess the market-readiness of companies, advise companies on how to improve their business performance and identify funding resources where needed.
- Noteworthy advancement on the establishment of a Manitoba Indigenous Tourism Association occurred in 2019–20.
- Manitoba was scheduled to host the next International Indigenous Tourism Conference (IITC) in Winnipeg in September 2020. Travel Manitoba promoted Manitoba as the next host of the IITC at the 2019 event in Kelowna B.C. An official announcement took place, which included a promotional video and Manitoban Indigenous entertainment, which generated tremendous excitement. Significant progress was made on developing the Manitoba conference program before the conference was postponed until 2021 due to COVID-19.



Several initiatives relevant to Francophone marketing initiatives were advanced in 2019–20:

- A Francophone Steering Committee was established to provide input into Francophone development and marketing initiatives.
- An inventory of Francophone tourism products in Manitoba was developed in partnership with CDEM, Tourisme Riel and Regional Tourism Associations.
- An economic impact study was initiated in 2019–20. The contract was awarded to PwC. The project is now delayed due to COVID-19.
- Travel Manitoba, CDEM and Tourisme Riel began work on a joint marketing strategy for Francophone tourism in Manitoba.
- Travel Manitoba developed the Summer in St. Boniface video featuring the *Passion et Histoire* place brand.

6. Collaborate with Destination Canada on leveraging the Provincial Tourism Strategy and driving future opportunities for Manitoba

Travel Manitoba partnered with Destination Canada on several initiatives in 2019–20, including:

- Promotional partnerships in Australia, U.S. and Canada
- Trade activities in the U.K., Germany and Australia. DC provided flight assistance for several familiarization tours.
- Travel Manitoba was a full research partner with Destination Canada in 2019–20 for the first time. This allowed access to additional research resources and databases. As a result, Travel Manitoba was able to advance consumer targeting and better support marketing decisions.



GOAL 5: BUILD PUBLIC SUPPORT FOR TOURISM

1. Create a new public awareness campaign on the province-wide value of tourism and Manitobans' role and connection to tourism

Travel Manitoba implemented several initiatives across the province, with a heightened focus on Northern Manitoba, designed to increase public awareness of the value of tourism in their region. These ongoing initiatives have successfully increased awareness of the potential for tourism in the North while garnering support for tourism and community pride.

- In spring 2019, a public campaign was launched on radio to promote the value of tourism. This campaign ran for four weeks on radio stations in Winnipeg (in English and French), Brandon, Portage la Prairie, Neepawa/Minnedosa, Virden/Oak Lake, Altona, Steinbach, Boissevain and Winkler. In addition, a separate campaign targeted Northern communities of Flin Flon, The Pas, Thompson, Dauphin and Swan River and was produced in English and Cree.
- Travel Manitoba produced a video that featured local operators highlighting the value of the tourism industry and potential for tourism growth in the North.
- The first annual Northern Manitoba Tourism Awards were held in April 2019, which welcomed 100 attendees. Winners were selected from five categories from over 30 nominations.
- Travel Manitoba manages the Manitoba North Facebook page, which plays an important role in engaging Manitobans by sharing new developments and celebrating the success of the Northern tourism industry. This page has grown to over 700 followers and highlights content from tourism providers in the North, related news and consumer-generated content.

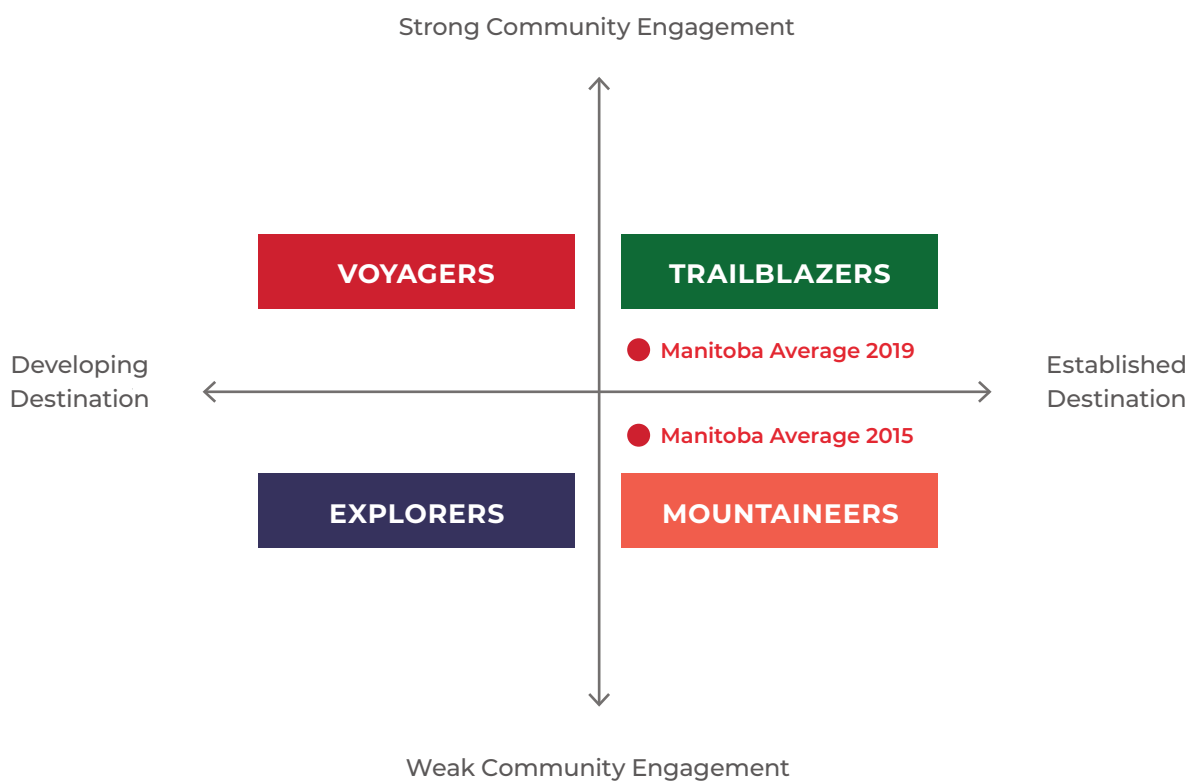


2. Build awareness of tourism as an economic driver, key employer and dynamic career

Significant progress was made in the development of research tools and methods that monitor Manitoba's performance as a tourism destination while building workforce support that continues to position Manitoba for growth.

- In a March 2020 survey, 57% of Manitobans identified Manitoba's tourism industry as very important for the economic well-being of the province.
- Travel Manitoba worked with NextFactor to conduct a DestinationNEXT assessment for Manitoba in 2015 and 2019. The survey of tourism industry stakeholders measures perceptions of Manitoba's tourism strengths and community engagement. Manitoba shifted from Mountaineer in 2015 to the Trailblazer category in 2019, which indicates stronger community alignment and increased destination strength. Manitoba's scores in destination strength and community alignment are above industry average.

- o From a destination strength perspective: Manitoba's perceived performance in convention and meeting facilities improved, but performance decreased for communications and internet infrastructure and accommodation.
- o From a community engagement perspective: Increases were achieved in several areas which included funding support, policy and regulatory environment, industry support, economic development, partnership strength and organizational governance model.



- In November of 2019, Travel Manitoba conducted a survey with industry partners in the North to gather feedback on the impact of the Northern Tourism Strategy. Seventy-five percent of survey respondents were aware of the Northern Manitoba Tourism Strategy. Of the respondents that were aware of the strategy, 57% indicated that they have experienced positive impacts on their business or community resulting from the strategy.

3. Ensure that provincial and municipal governments and their officials recognize and regularly communicate tourism's key role in economic growth, job creation and retention, residential tax savings, innovation and education, infrastructure improvements, and quality of life.

Travel Manitoba is the key advisor to provincial and municipal governments as it relates to the tourism industry in Manitoba and its impact on economic growth, business development and improvement to communities.

- Travel Manitoba meets regularly with senior provincial government officials, including meetings with the Premier.
- In 2019, a video produced by Travel Manitoba on the Value of Tourism was presented at the Manitoba Chambers of Commerce State of the Province address.
- All provincial economic development officers now have tourism as a key part of their portfolio and ongoing responsibilities.

4. Engage Manitoba's new international immigrants as global champions of tourism and capitalize on their key connections as tourism ambassadors to their countries of origin.

An Innovation Café⁴ was held in June 2019 with representatives from provincial government departments, which included Manitoba Immigration and Economic Opportunities and Manitoba Economic Development and Training. Based on the outcomes of the session, Travel Manitoba will develop and implement a plan in 2020–21.

⁴ Travel Manitoba regularly holds Innovation Café sessions throughout the year. These sessions are consultative, strategic and innovative brainstorming sessions with stakeholders from a specific sector or area.

Conclusion

In order to continue to meet and exceed the goals and expectations outlined in the Provincial Tourism Strategy, key issues arising from the COVID-19 pandemic will need be addressed and new opportunities for growth must be identified. Identifying these key areas will support and stabilize the tourism industry moving forward.

The Provincial Tourism Strategy will continue to be supported through innovative monitoring systems. This will ensure success is tracked over time despite major unexpected interruptions to business, such as the COVID-19 pandemic. This evidence-based approach will support Manitoba's tourism industry in continuous improvement, innovation and recovery.

Given the need for focus on recovery, the Provincial Tourism Strategy for Manitoba puts this province in a strong position moving forward. While the new reality of a post-COVID world will require an update to the Provincial Tourism Strategy, to be completed in 2020, the goals of the existing strategy provide a framework on which the recovery of Manitoba's tourism industry can be built. Short-term priorities may shift, but long-term priorities continue to represent realistic and achievable paths towards growth.

The strong partnership between Travel Manitoba, the Manitoba Chambers of Commerce and the Government of Manitoba will ensure an updated Provincial Tourism Strategy is positioned to support tourism growth that benefits not only our industry, stakeholders and visitors, but all residents of Manitoba through enhanced tourism offerings, economic development opportunities and pride for their home province.

