

April 13, 2017

The Value of Tourism

Travel Manitoba



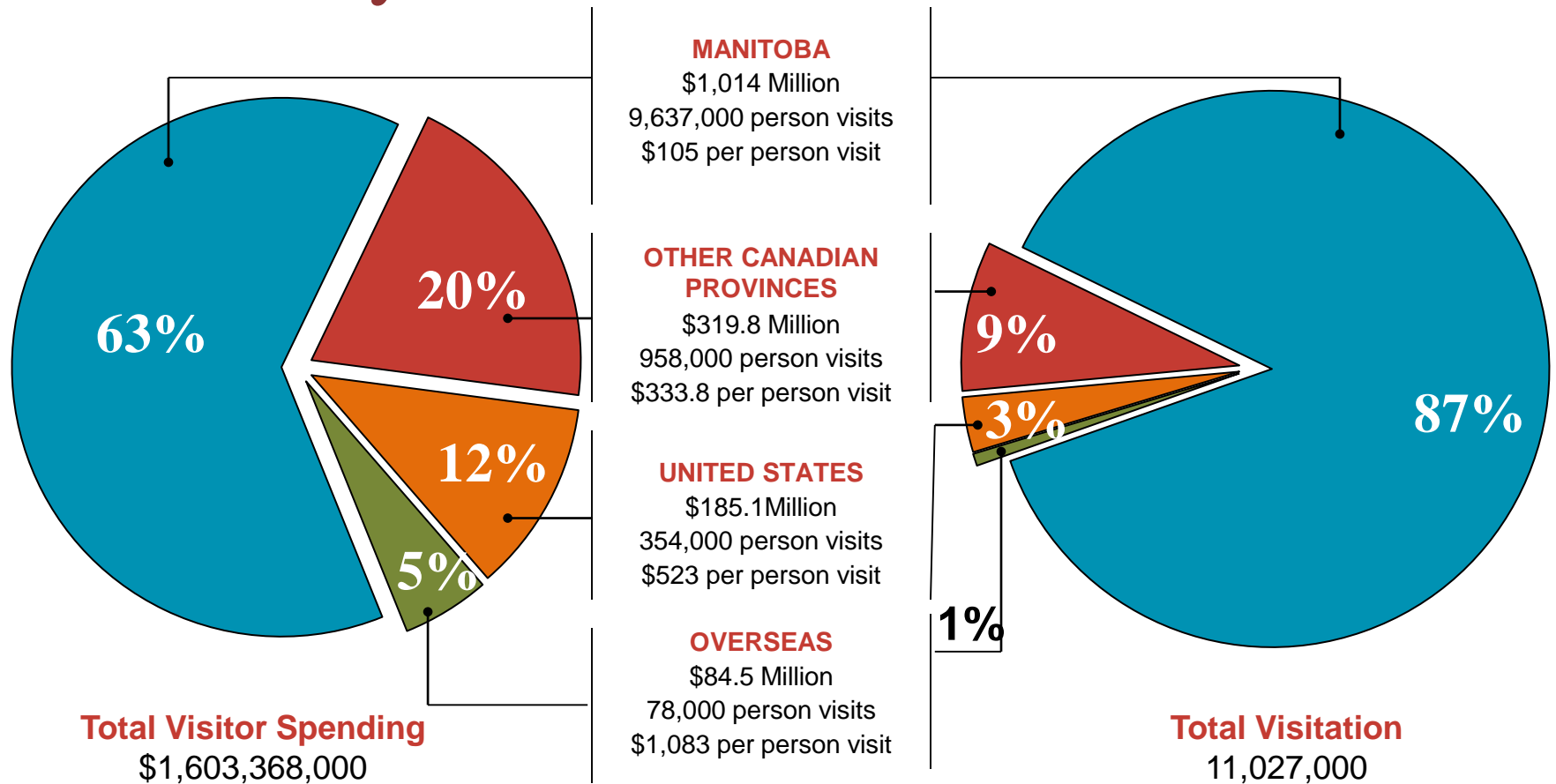
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Tourism: Fastest Growing Sector in the World

- ✓ Global tourism industry forecast to grow 3.3% a year
- ✓ 1.8 billion international tourist arrivals by 2030
- ✓ 1 in 11 jobs
- ✓ \$1.1 trillion (USD) in exports



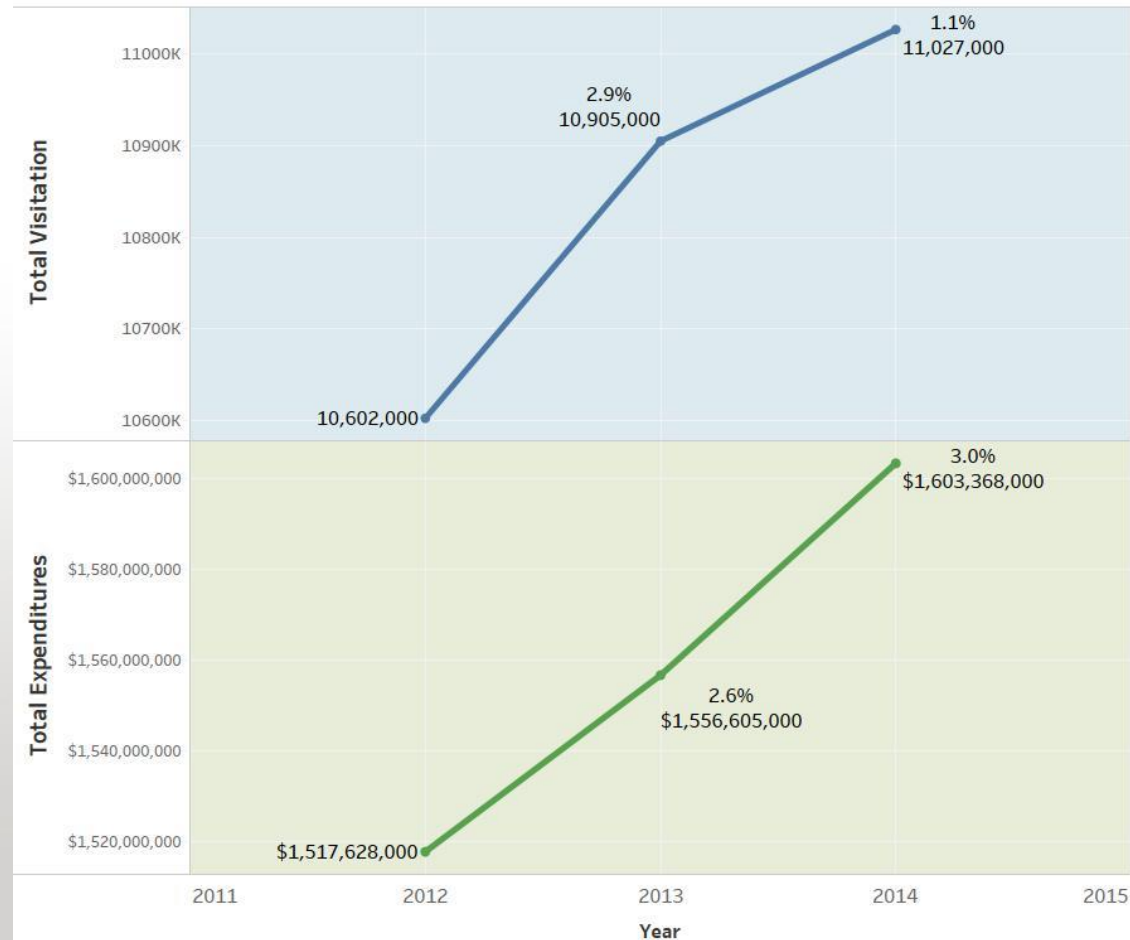
Importance of Tourism to Manitoba's Economy



Source: Statistics Canada – Travel Survey of Resident of Canada (TSRC) and International Travel Survey (ITS), Research Resolutions – 2014 Detailed Tabulations.

Tourism Industry Growth

Tourism Visitation and Expenditures Growth (2012 - 2014)

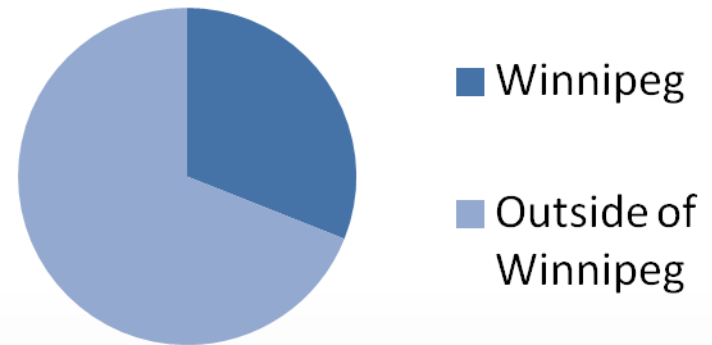


The marks are labeled by total visitation, expenditures, and year-over-year % growth.

Manitoba's visitors

69% of Manitoba tourist visits occur outside of Winnipeg

Manitoba travellers



	Visitation	Expenditures
United States	3%	12%
Overseas	1%	5%

International markets represent a significant growth opportunity

The background of the slide is a photograph of the Aurora Borealis (Northern Lights) in a dark sky, with green and blue light streaks. Below the sky, there is a dark silhouette of a forest and a body of water reflecting the lights. A solid red vertical bar is on the far left edge.

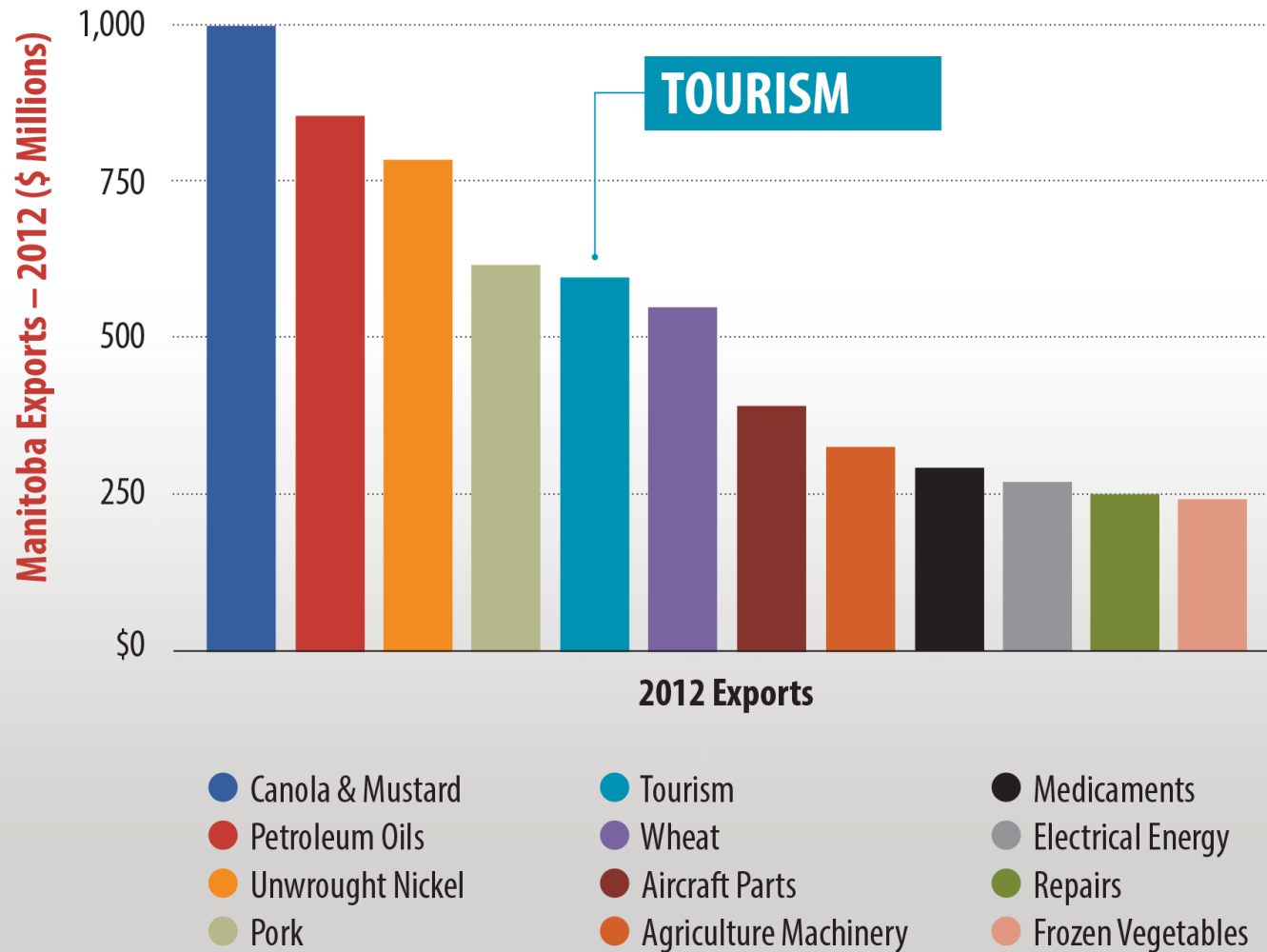
Tourism generates

25,000 jobs
5,400 companies

\$625 M in tax revenues

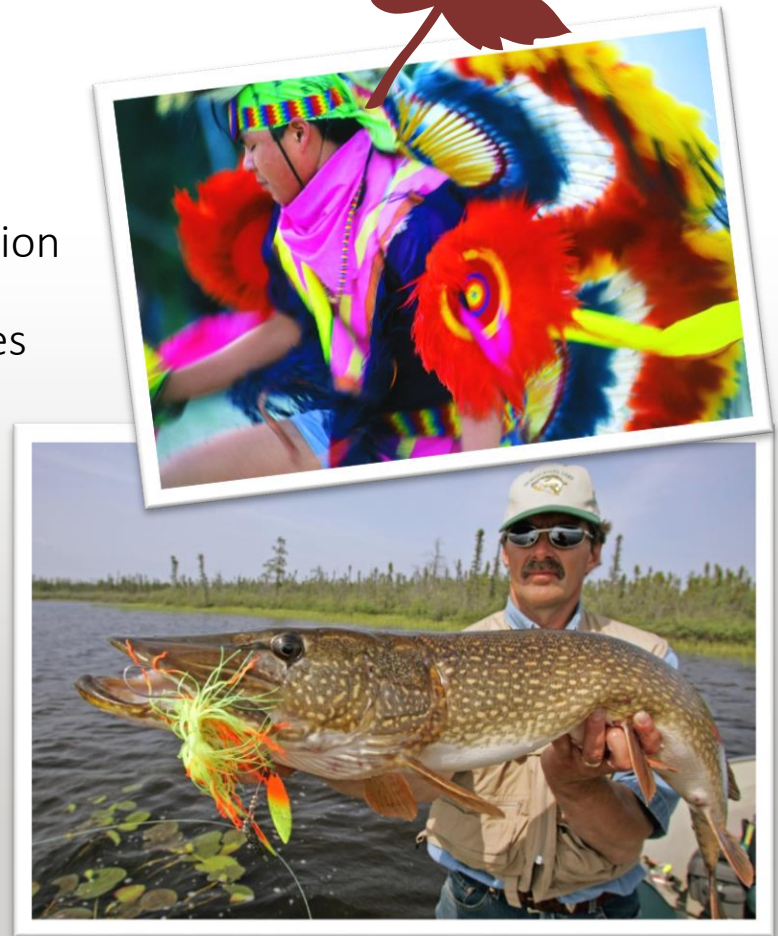
A ripple effect on the
economy

Tourism is an Export Sector



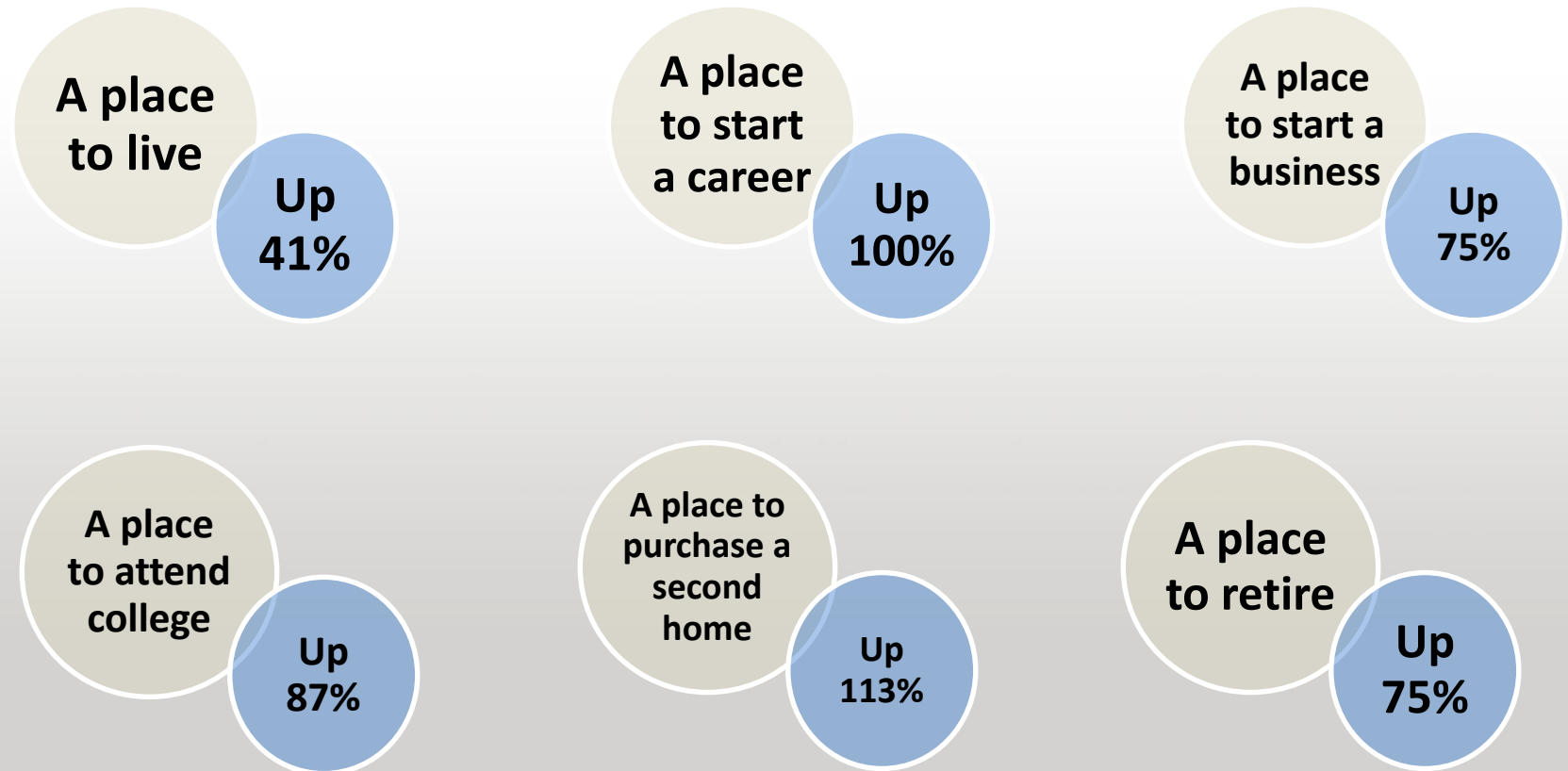
How communities benefit from tourism

- ✓ Improved shopping facilities
- ✓ Improved transportation & communication
- ✓ Improved cultural & recreational facilities
- ✓ Instills a feeling of pride
- ✓ Improves the quality of life



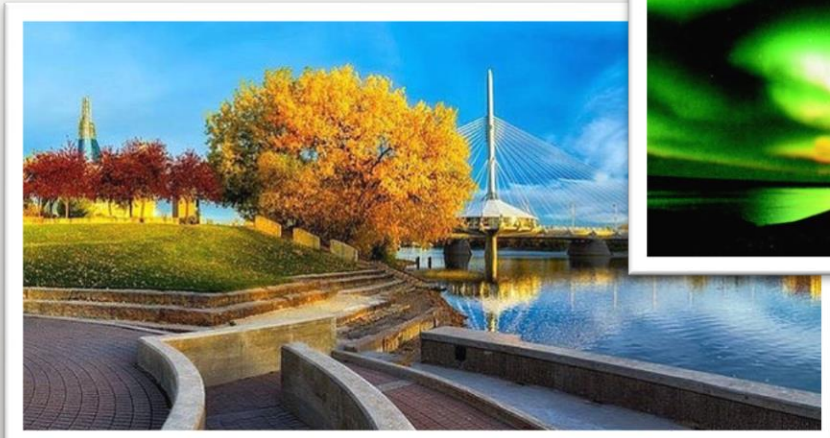
Tourism's “halo effect”

- ✓ Tourism marketing increases the destination's overall image
- ✓ North Dakota's *Legendary* campaign's “halo effect”



Looking forward

- ✓ Rank 5th in Canada by 2020 with \$2B in expenditures
- ✓ Maintain increased investment through Plan 96/4



Plan 96/4 – a Sustainable Tourism Investment

- ✓ Dedicates 4% of provincial tourism tax revenues to fund Travel Manitoba
- ✓ Provides an immediate return on incremental investment
 - ✓ Increased government budgets for priorities like healthcare, education and infrastructure
- ✓ 100% of investment directed back into marketing



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Canadian Markets

- ✓ Manitoba
- ✓ Ontario
- ✓ Quebec

*Brand awareness
up 50% in Toronto
& Montreal*



Potential of the US Market

- ✓ 2015 Canadian tourism growth rate of 2%
- ✓ 8.3% increase in US visitation to Canada
- ✓ 9% increase in direct US entries to Manitoba from 2014 to 2016

US Target Markets

- Upper Midwest
 - North Dakota
 - Minnesota
 - Illinois
 - Indiana
 - Michigan
 - Ohio
- California



Overseas Markets

- ✓ United Kingdom
- ✓ Germany
- ✓ France
- ✓ China
- ✓ Australia



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"Canada's Heart" has dual meanings:
It describes our geographic location
as well as Manitoba's caring and
welcoming personality.

In any language, the maple leaf is
a form of shorthand signifying the
pristine beauty, safety and quality
of Canada – important selling
points in international markets.

"Beats" signals that Manitoba is
a vibrant, lively place, with thrilling
adventures and immersive experiences
waiting to be discovered.



WINNIPEG

ONE OF THE TWENTY BEST TRIPS IN 2016

-*NATIONAL GEOGRAPHIC TRAVELER* MAGAZINE



Tourism Summit

DestinationNEXT: a global study on the trends impacting destinations and destination marketing organizations



DestinationNEXT Assessment

Mountaineer: Destination realizes some benefits of tourism (strong brand and products), but not its potential due to lack of community engagement

Key strategic challenges:

- ✓ Engaging the community
- ✓ Maintaining and improving tourism infrastructure and service levels
- ✓ Raising the profile and appreciation of the tourism industry



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DestinationNEXT Assessment

Destination Strength Report Card

- ✓ Brand is performing well
- ✓ Lower scores on:
 - ✓ International destination readiness
 - ✓ Air access
 - ✓ Transportation
 - ✓ Signage
 - ✓ Infrastructure



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DestinationNEXT Assessment

Community Engagement Report Card

- ✓ Municipal government and community support
- ✓ Workforce retention and quality



Collaboration and Investment Partnerships

Everybody wins when more visitors come to a destination

- ✓ Attract visitors
- ✓ Inspire them to stay longer and spend more
- ✓ Focus on what makes your destination unique
- ✓ Marketing exposure may not be equal



Best practice: Clear Lake Country



Thank you



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