

Turtle Mountain Tourism Summit



MANITOBA
CANADA'S HEART IS CALLING

About Travel Manitoba

Travel Manitoba is the only public/private non-profit tourism marketing organization that provides a province-wide platform to promote Manitoba as a premier travel destination.

Travel Manitoba is a Crown corporation whose role is to provide leadership by collaborating with tourism businesses, communities, destination marketing organizations and governments to realize the full potential for tourism in Manitoba.





VISION

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



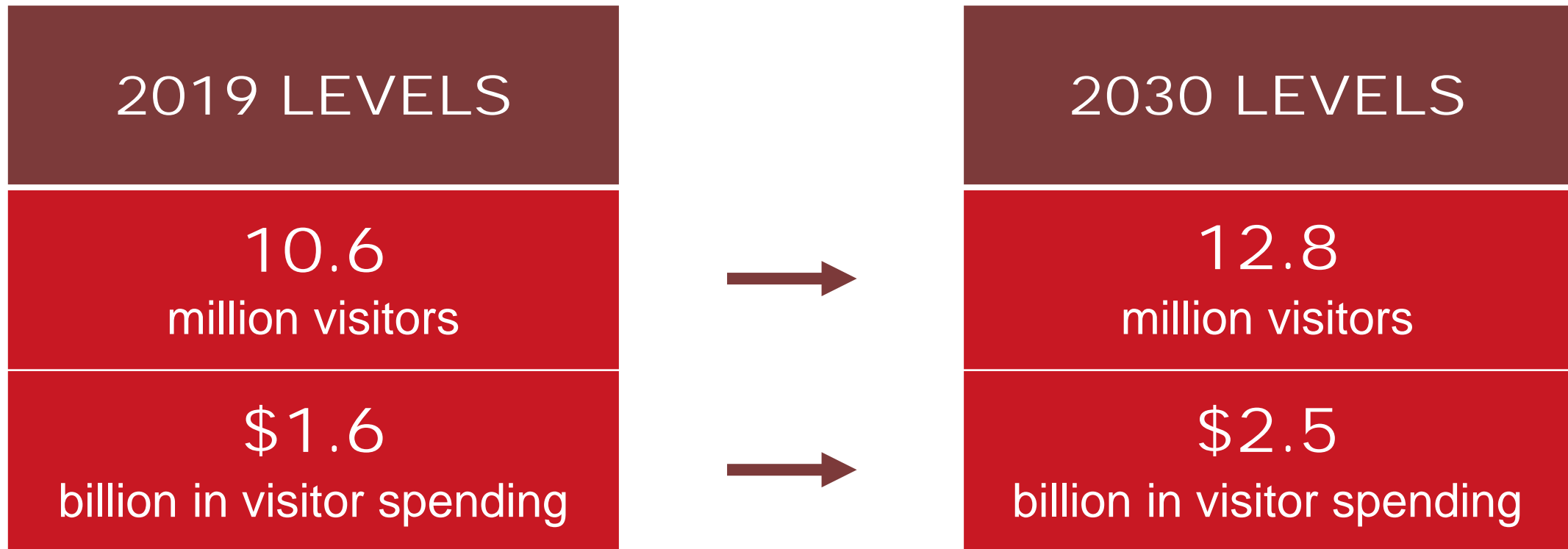


MISSION

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



Target: Grow visitor spending 50% by 2030



Goals

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



State of the Industry



Overview

- COVID had a devastating impact on the tourism economy.
- We focused on responding, rebuilding and recovery.
- Travellers have new expectations and tourism businesses will need to adapt.
- Manitobans now understand what tourism means to their communities.
- Some tourism businesses saw unprecedented attendance throughout the pandemic.





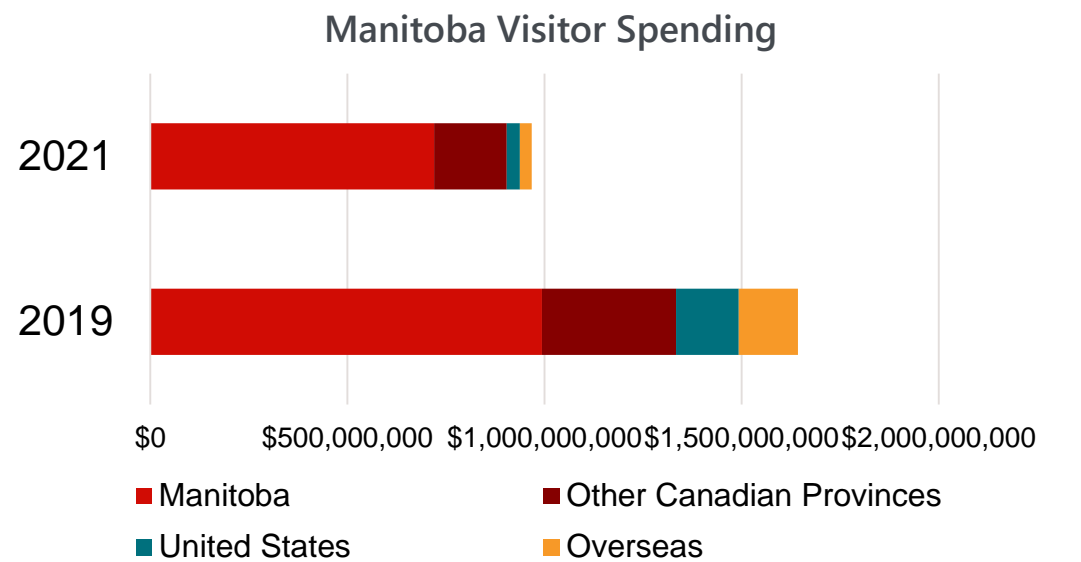
Industry Support

- Travel Manitoba mitigated the impact of the pandemic by aggressively marketing the “Home is where the Heart is” campaign and providing development support to businesses and communities.
- Provided \$1 million to support experience enhancement and creation.
- Secured a total of \$2 million in federal funding to support experience development and industry training

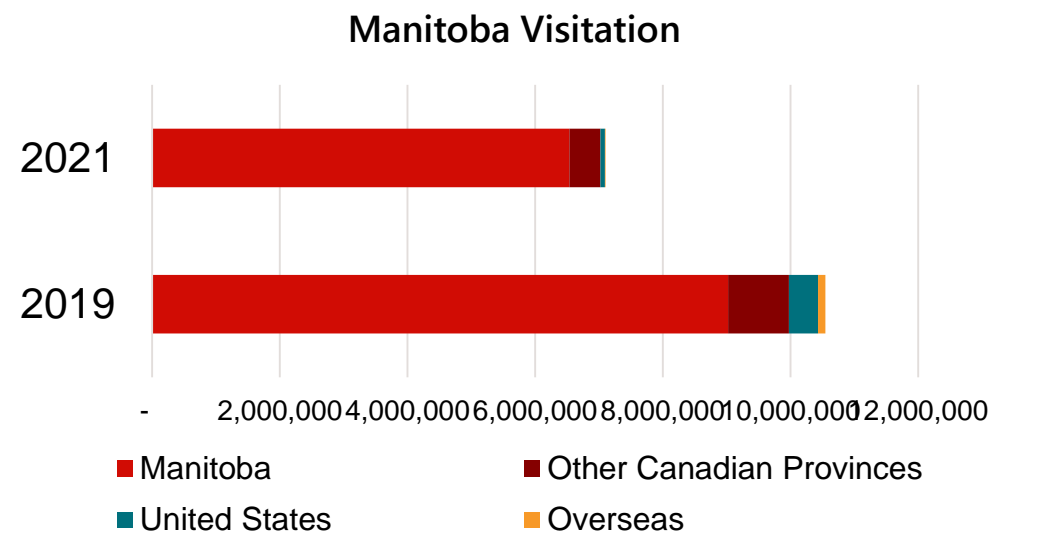


Gauging Recovery: 2021 Achieved 59% of 2019 Visitor Spending

Visitor Spending in MB	2019	2021
Manitobans	\$993,600,000	\$720,000,000
Other Canadian Residents	\$340,500,000	\$184,600,000
United States' Residents	\$158,600,000	\$32,800,000
Overseas Residents	\$150,100,000	\$30,200,000
Total	\$1,642,800,000	\$967,600,000



Visitation to MB	2019	2021
Manitobans	9,025,000	6,538,000
Other Canadian Residents	949,000	483,000
United States' Residents	456,000	70,100
Overseas Residents	116,000	13,500
Total	10,546,000	7,104,600

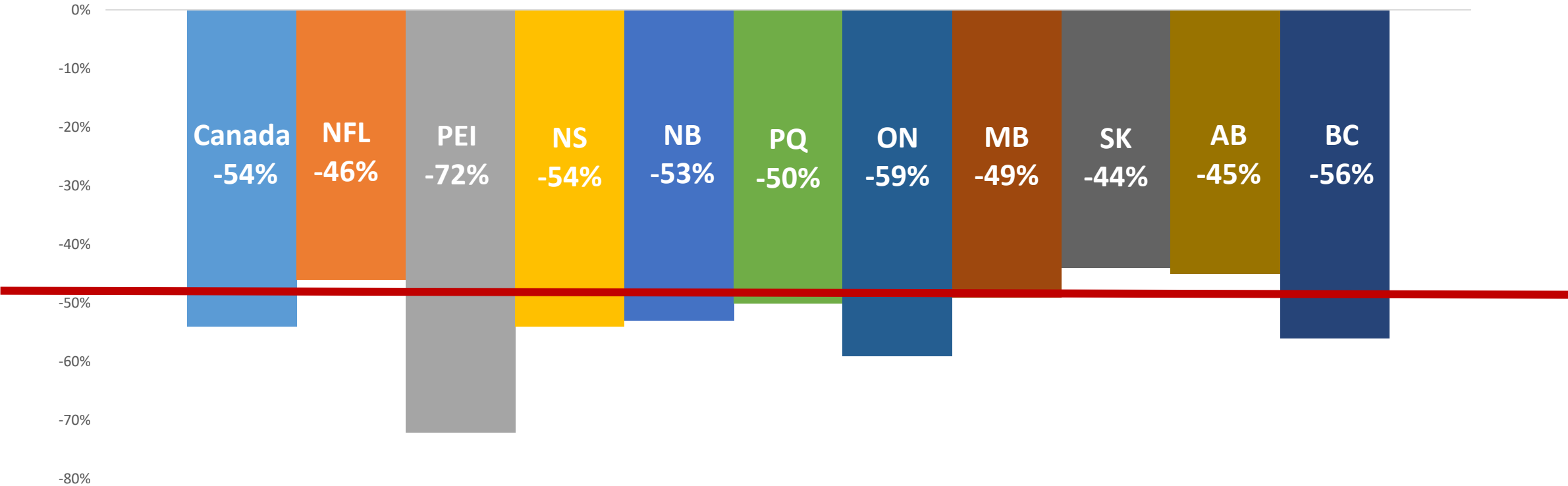


Source: National Travel Survey and Visitor Travel Survey, Statistics Canada



COVID Impact: Manitoba Weathered the Storm Better Than Most Other Jurisdictions in Canada

Visitor Spending Losses in 2020 versus 2019 by Province

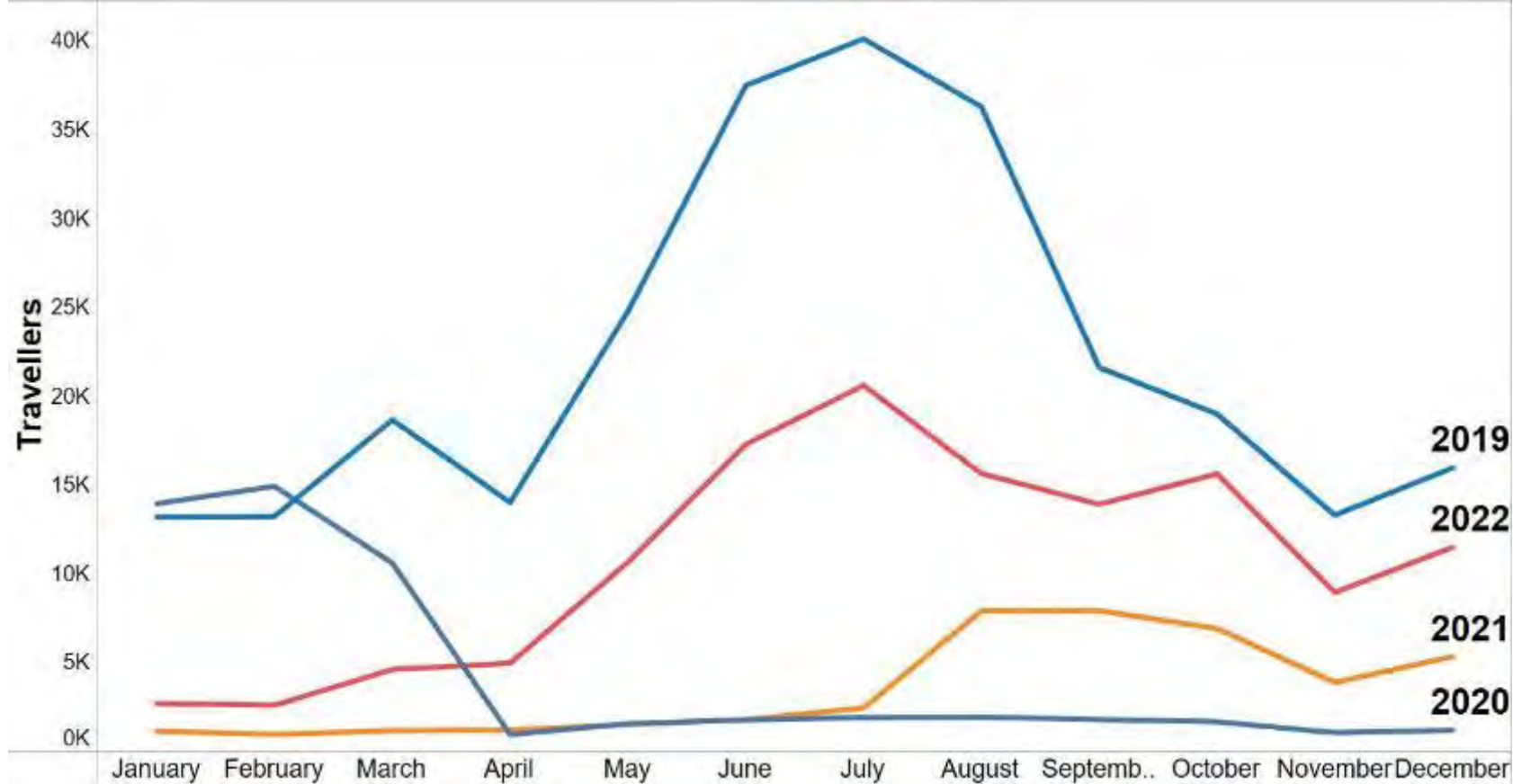


Source: National Travel Survey and Visitor Travel Survey, Statistics Canada



U.S. Residents Entering Canada at Manitoba Land Borders

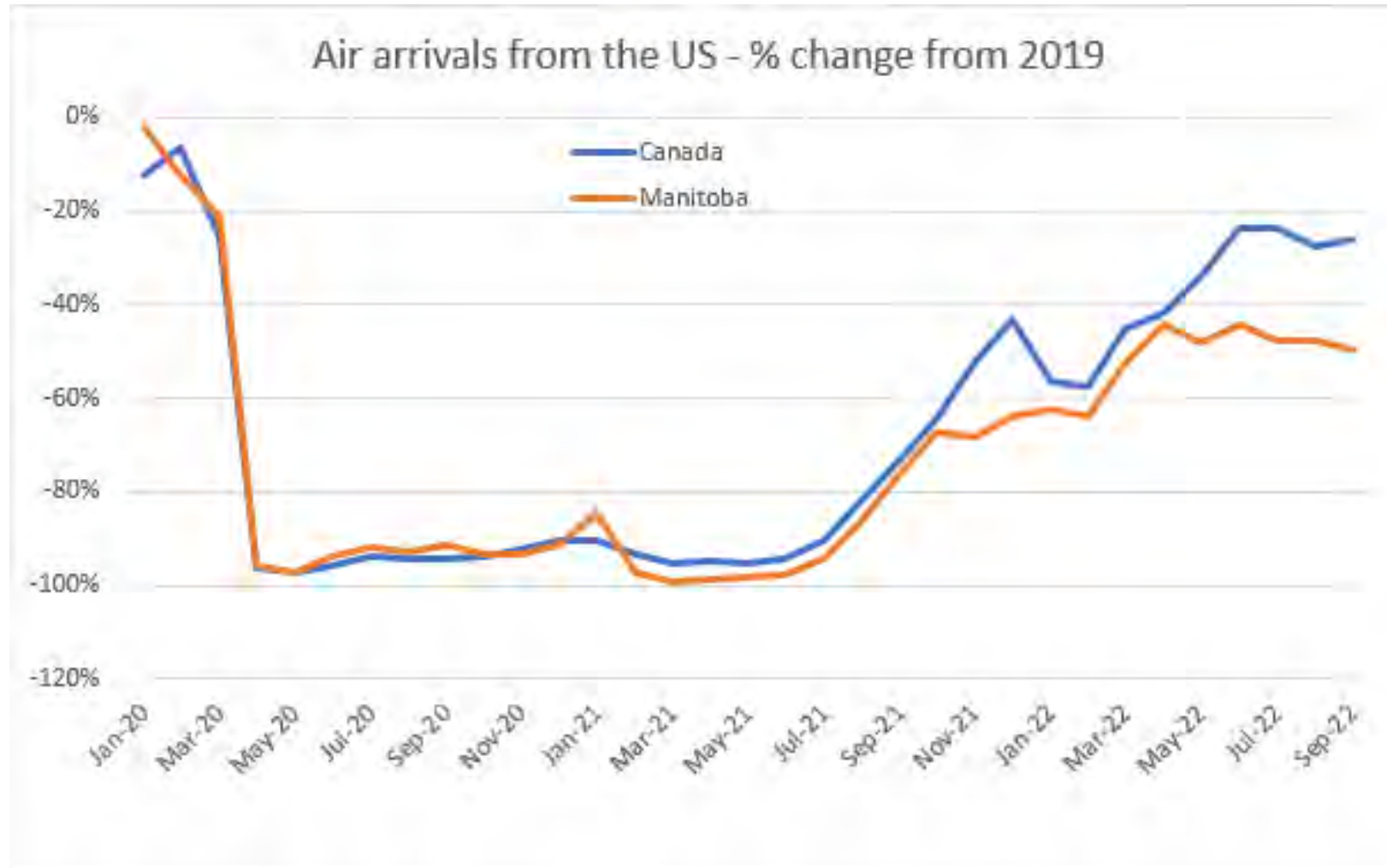
January 2020 to December 2022



Source: Statistics Canada

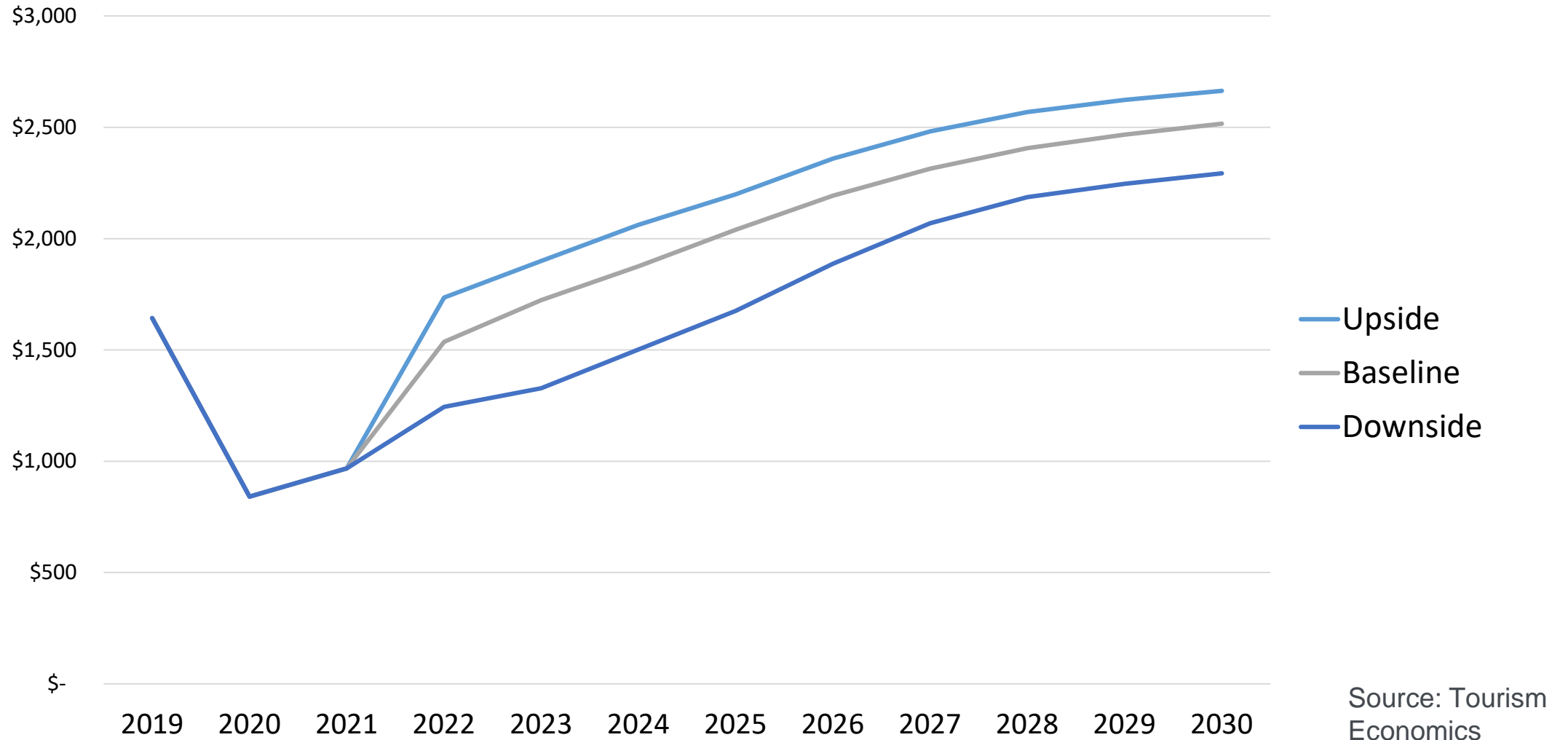


Manitoba's Direct Air Access Recovery Lags

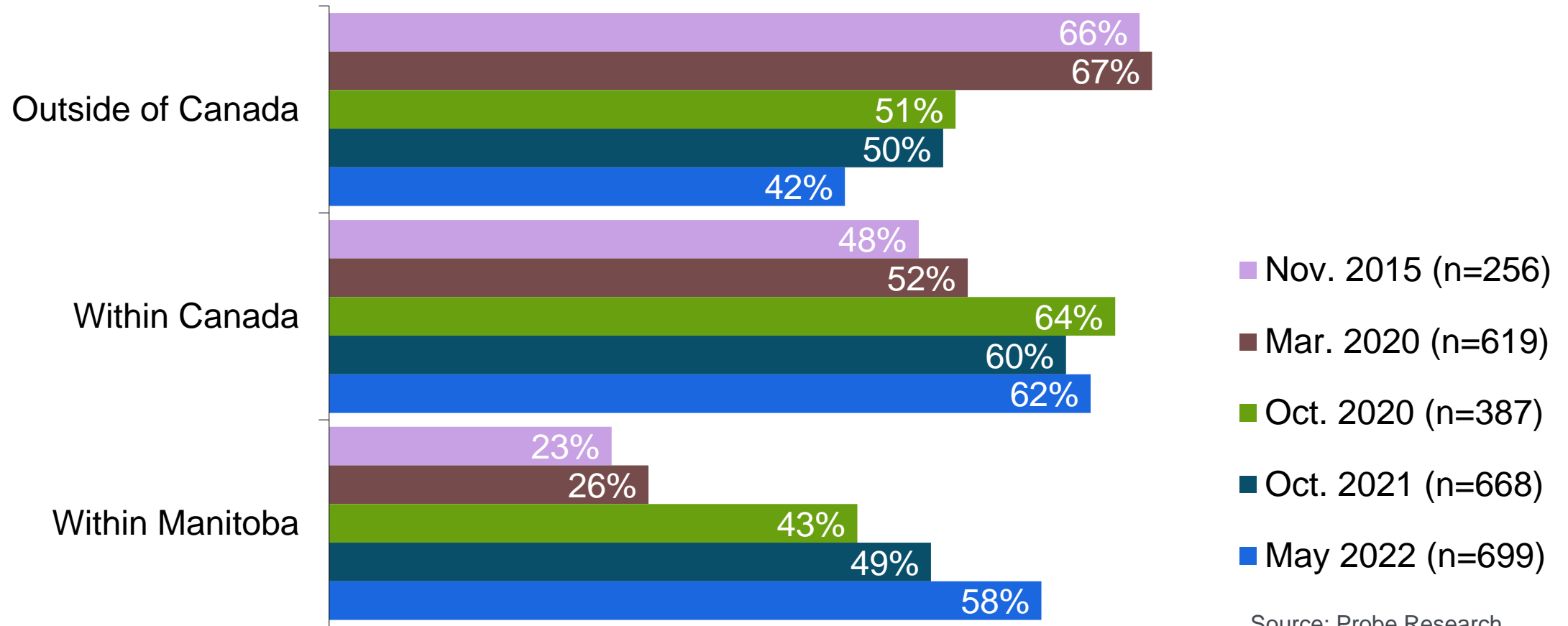


Source: OAG Analyser

Visitor Spending in Three Scenarios (\$ Millions)



Interest in Traveling Within the Province Has Grown Throughout the Pandemic



Target Markets – Domestic

MANITOBA

- Our largest market
- In-province marketing led to increased travel during COVID
- While Manitobans spend less per person than other domestic and international visitors, there is significant potential to increase spending and length of visit



Target Markets – Domestic

CANADA

- Manitoba's second largest tourism market
- Ontario, Saskatchewan and Alberta visitors spend the most
- North west Ontario and Saskatchewan are priority markets
- Winnipeg and resort areas are key draws



Target Markets – U.S.

- Close geographic proximity, affluence and awareness
- Individual states contribute more revenue than countries like Germany, Australia and the UK
- Short haul markets – Minnesota and North Dakota
- Long haul markets – California and Texas



Target Markets – International

- Leverages Destination Canada's awareness building in Germany, United Kingdom and Australia
- Aligns efforts with Destination Canada's strategy to:
 - Target high value guests using new global partnerships
 - Attract new media partners
 - Tighten integration with airlines and high value trade partners



Lead Brand and Market Positioning



Refreshed Brand

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BOULDERS, ROCKS AND PEBBLES

- Destination Canada's *Explorer Quotient* is overlaid with Environic's *Prizm* platform
- Allows for hyper-targeting of audiences and moves them from inspiration to visitation.
- Unique approach to categorizing the extensive travel experiences Manitoba offers.



Iconic experiences for which visitors may come from another country



The "dont miss", interest-based groupings that may draw visitors from another province



Singular experiences that you might suggest a visitor see while they're here

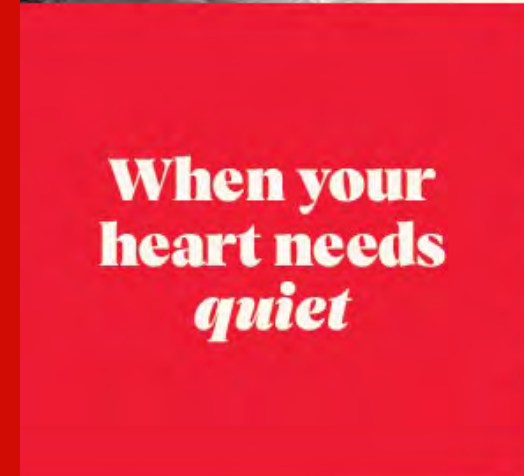


Current Marketing Campaign

- Multi-channel: print, digital, social, traditional TV and OTT
- Creates awareness about the new Manitoba brand and creates excitement to travel



**When your
heart needs
to *race***



**When your
heart needs
*quiet***



**When your
heart needs
*wild***

Campaign Creative

Content Pillars

- Road Trips
- Indigenous Experiences
- Stunning Stays
- Urban Escapes
- The North
- Festivals, Events & Arts

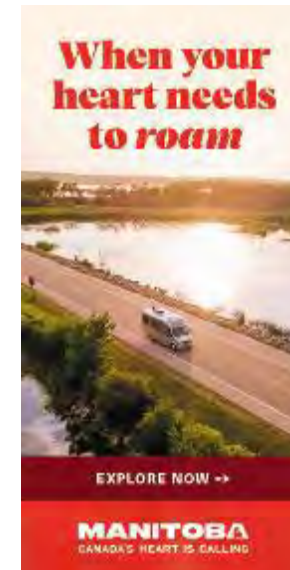




Photo: Dustin Silvey



Advance Destination Management



Advance Destination Management

- Gap Analysis and Destination Area Assessments done for 12 rural communities
- Objective: To identify experience development opportunities that would have a significant and transformational impact on visitor spending in Manitoba



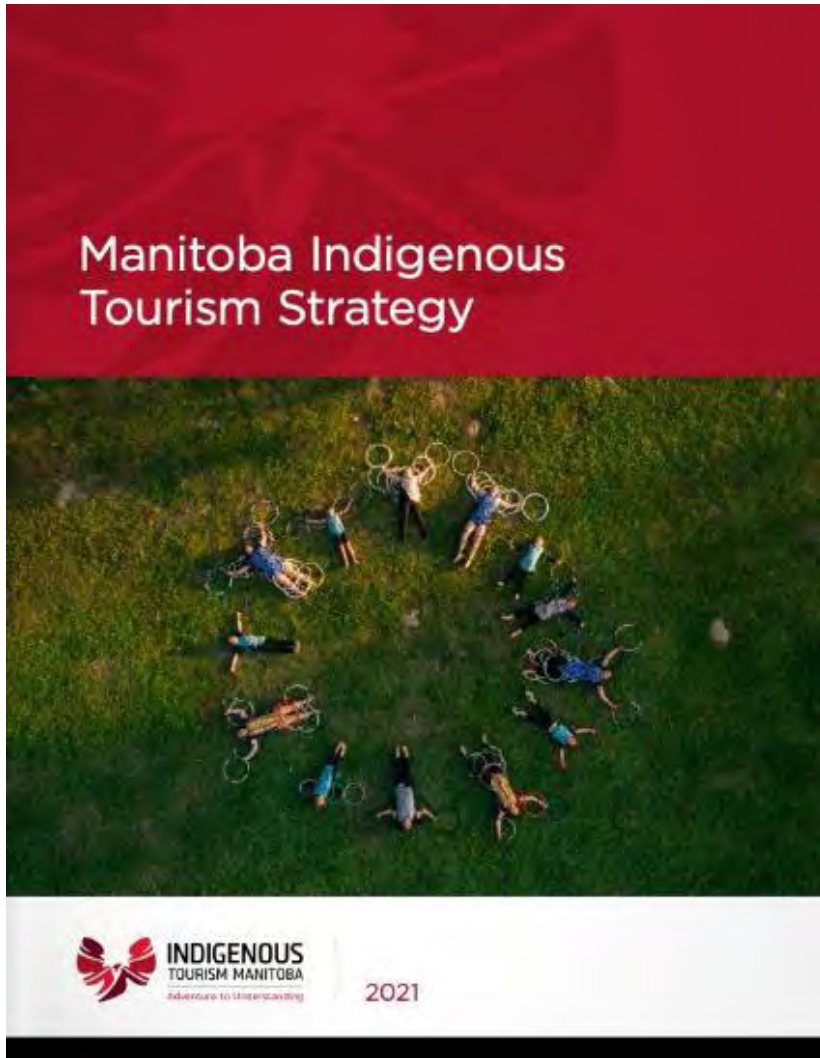
Probe Research

- Conducted 12 Destination Area Assessments to serve as the foundation for our new Destination Management Plan
- Invest in strengthening community and regional development by working with communities to implement key recommendations outlined in the assessments

SINCLAIR BARNES LIMITED
BRAND & MARKETING STRATEGY

PROBE
RESEARCH INC.

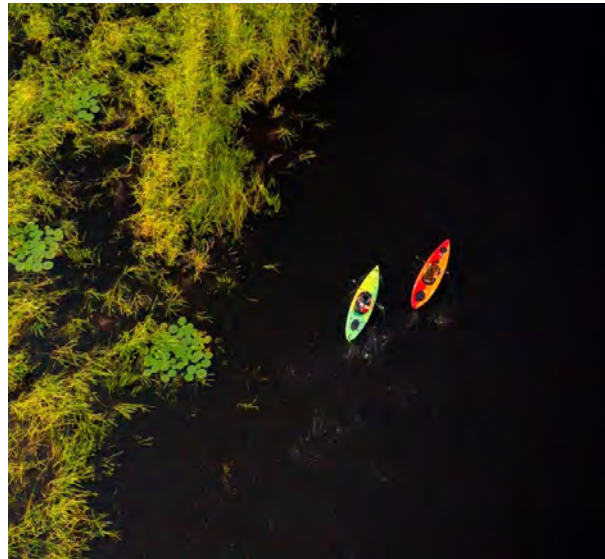
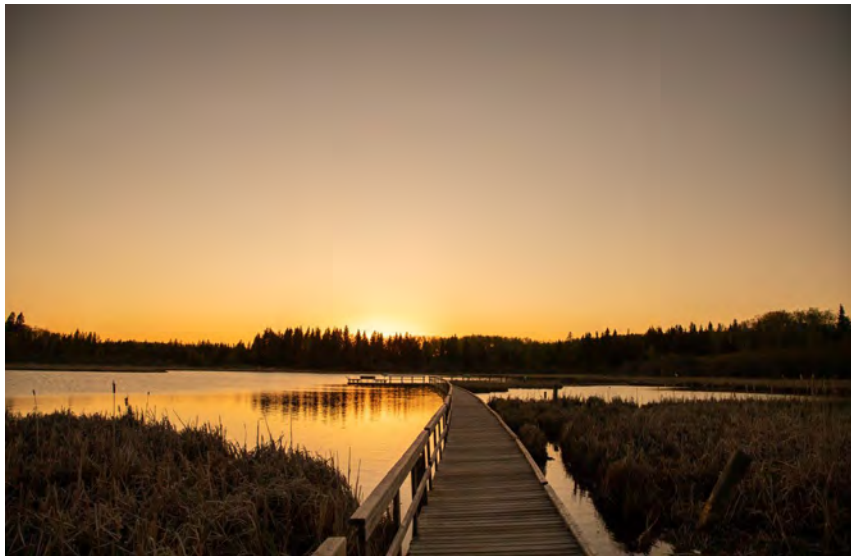
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**Indigenous
Tourism
Manitoba**
Adventure to Understanding



INDIGENOUS
TOURISM ASSOCIATION OF CANADA



Foster Collaboration and Build Support for Tourism



Value of Tourism

- Job creation and retention, residential tax savings, innovation and education, infrastructure improvements and improvements to our quality of life.
- Tourism is a key employer and offers a dynamic career.

**TRAVEL
MANITOBA**

Manitoba 

 **MANITOBA
CHAMBERS OF
COMMERCE**





Thank You

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