

Accommodations Facilitated Session Summary

April 5, 2013



Prepared for
Travel Manitoba



RESEARCH INC.

...for what you need to know.

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Background & Objectives

Travel Manitoba commissioned Probe Research, Inc. to facilitate a planning session among organizations representing the accommodations sector within Manitoba on April 5, 2013 at the Fairmont Hotel in Winnipeg, Manitoba. Representatives of Travel Manitoba, Tourism Winnipeg, the Manitoba Rural Tourism Association, the Manitoba Hotel Association and Economic Development Winnipeg, as well as the Manitoba Tourism Secretariat attended all or a portion of the session. The following accommodations-related organizations were represented at the session:

- Canad Inns Corp.
- Fairfield Inn & Suites
- Greenwood Inn & Suites
- Ramada Viscount Gort Hotel
- Victoria Inn Hotel & Convention Centre (Winnipeg)
- Westmount Hospitality
- Delta Winnipeg
- Hampton Inn by Hilton Winnipeg Airport
- Hilton Winnipeg Airport Suites
- Inn at The Forks
- Norwood Hotel
- Radisson Hotel
- The Fairmont Winnipeg
- Comfort Inn (Winnipeg and Brandon)
- Holiday Inn Airport West & Suites Downtown
- Humphrey Inn and Suites
- La Chaumière du Village Bed and Breakfast
- Moon Gate Bed and Breakfast
- Evergreen Bed and Breakfast/Bed and Breakfast Manitoba
- Solmundson Gesta Hus Bed and Breakfast & Wellness Center
- The Last Straw Bed and Breakfast
- Harlequin House Bed and Breakfast
- Deer Ridge Cabins
- Elkhorn Resort Spa & Conference Center
- Lazy Bear Lodge
- Lilac Resort
- Guest House International/Backpackers Winnipeg
- Oxbow Inn
- The Russell Inn

Session participants covered a number of topics important to the roles of their respective organizations insofar as they pertained to the tourism sector.

The daylong session was facilitated by Lloyd Fridfinnson, Vice President, Probe Research Inc. and followed a guide prepared in consultation with Travel Manitoba (see Appendix I).

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Summit Facilitated Session Summary

Introduction

Following an introduction by Travel Manitoba CEO Colin Ferguson participants were presented with the following agenda for the day long discussion.

- Provide an overview of what Travel Manitoba is doing.
- Discuss accommodations sector marketing trends and marketing investments.
- Identify tourism-related accommodations sector activities.
- Identify and define existing partnerships.
- Brainstorm as to how Travel Manitoba can collaborate more efficiently with the accommodations sector.

Participants were also invited to make a written note of any issues not discussed as thoroughly as they might wish. Allowance was made to revisit these issues at the end of the day for further discussion or, alternatively, to place them on the agenda of a future meeting.

Travel Manitoba Overview

Colin Ferguson once again addressed the meeting, providing an overview of Travel Manitoba's business plan and recent initiatives.

Opening Exercise

Participants were asked to collectively answer 5 key questions:

1. What is your core business?
2. Who are your core customers?
3. What kind of customer relations management tools do you use?
4. Where do you see yourself relative to the tourism industry?
5. What do you expect to achieve today?

To facilitate discussion, participants were teamed with representatives of organizations that were similarly mandated or may have common accomplishments, challenges and experiences. The table on the following page outlines organizational groupings.

Large Hotels 9 orgs/ 12 people	Large Hotels 10 orgs/12 people	Large Hotels 8orgs/11people	Bed and Breakfast 8 orgs/9 people	Smaller / Rural 9 orgs/12 people
Canad Inns Corp. Fairfield Inn & Suites Greenwood Inn & Suites (2) Ramada Viscount Gort Hotel (2) The Manitoba Hotel Association Victoria Inn Hotel & Convention Centre (Winnipeg) (2) Westmount Hospitality Tourism Winnipeg Travel Manitoba	Delta Winnipeg Hampton Inn by Hilton Winnipeg Airport Hilton Winnipeg Airport Suites (2) Inn at The Forks Norwood Hotel Radisson Hotel (2) The Fairmont Winnipeg Manitoba Hotel Association Tourism Winnipeg Travel Manitoba Economic Development Winnipeg (2)	Comfort Inn Winnipeg (2) Comfort Inn Winnipeg South Comfort Inn (Brandon) Economic Development Winnipeg (part) Holiday Inn Airport West (2) Holiday Inn & Suites Downtown (2) Humphrey Inn and Suites Travel Manitoba	La Chaumière du Village Bed and Breakfast (2) Moon Gate Bed and Breakfast Evergreen Bed and Breakfast/Bed and Breakfast Manitoba Solmundson Gesta Hus Bed and Breakfast & Wellness Center The Last Straw Bed and Breakfast Harlequin House Bed and Breakfast Tourism Secretariat Travel Manitoba	Deer Ridge Cabins (2) Elkhorn Resort Spa & Conference Center (2) Lazy Bear Lodge Lilac Resort Guest House International/ Backpackers Winnipeg Manitoba Rural Tourism Association Oxbow Inn (2) The Russell Inn Travel Manitoba

Question Responses

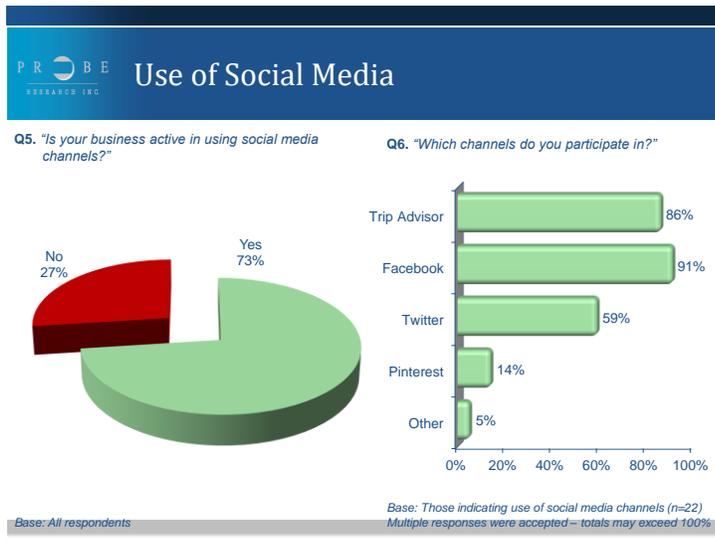
- **Core Business:** Supplying quality accommodations for various types of clients was the primary focus with meeting hosting for businesses and groups identified as a secondary dimension. Some participants, particularly those representing small operations, stressed their ability to provide a unique experience. Those from smaller establishments outside of Winnipeg also tended to include the provision of outdoor and nature activities as an important aspect of their business. Larger operations tended to emphasize the importance of providing banquet and fitness facilities.
- **Core Customers:** Primary customers of larger hotels included out-of-town business and leisure travelers, and to some extent those seeking a spa experience. Smaller out-of-town operations, especially lodges or resorts, included cultural and historical explorers. This latter group of guests may originate from outside of Manitoba, although they come from within as well. In addition to travelers from the United States, both England and Germany were identified as key markets for accommodations. Due to the nature of the services they are able to offer, hoteliers in smaller communities identified their customer base as mainly leisure focused.
- **Customer Relations Management:** There was considerable variation in the means by which organizations track visitors and customers. Large property operators indicated it was easier to gather information, such as the place of origin and the nature of travel, for large groups than was the case for independent visitors. Representatives of these businesses indicated that larger hotel chains used customized national customer relations management systems. Hotel sales teams were also seen as an important component in customer management within larger operations. Other long standing customer management tools included loyalty programs, guestbook usage and face-to-face discussions with guests. This latter information gathering technique was especially evident among lodges and bread and breakfast operators. Social media and other online communication tools, such as Trip Advisor, Star Reports and Travelocity, were identified as more recent developments in

customer relation management tools and are being broadly adopted. A number of participants compile mailing lists or conduct surveys in order to collect postal codes for customer tracking purposes. One group of participants mentioned of collaboration with Travel Manitoba and Tourism Winnipeg in an effort to understand where their visitors reside.

- Relative to Tourism: Participants identified themselves as frontline tourism representatives by virtue of the service they provide to out-of-town guests in offering a home away from home. The importance of the accommodation sector to tourism was perceived as having particular relevance to air travelers, as a hotel is typically the next impression following the trip from the airport. Participants also suggested that it is an "uphill battle" if some aspect of the visit beyond their control has "gone wrong". While there was some interest in promoting tourism experiences to their customers, the main focus was on housing visitors to Manitoba. Although the tourism role of the accommodations sector was described by some as "growing", most participants saw clear limits to their role within the tourism sector. These individuals felt it was up to others to attract visitors to the province or encourage resident Manitobans to get out and experience tourism events and facilities.
- Expectations for the Day: Participants identified a variety of objectives and reasons for attending the summit session, including: a desire to learn about new tools, to make new connections and network, and to raise their business profile. A desire to learn how to align accommodations sector tourism efforts with those of Travel Manitoba and Tourism Winnipeg, as well as to understand where and how tourism money is spent in the province were also identified. Some participants voiced a desire to become aware of and subsequently discuss Manitoba tourism offerings in order that they may be in a position to "put our best foot forward" when dealing with visitors. One participant, representing a larger accommodations property, expressed a desire to have the voice of the accommodations sector heard by government. This objective was placed in the context of existing limitations within the accommodations industry and the recognition of the need to educate frontline staff about Manitoba tourism experiences. It was also noted that "business tourists are reluctant tourists" in that they often do not wish to be at their destination. Some business travelers, it was claimed, specifically view Winnipeg negatively and regard the requirement to travel to this city as "a form of punishment". Facilitating tourism was also seen as a means by which to achieve a core objective of filling rooms on a consistent basis. Interestingly, one participant stated that greater capacity is required within the accommodation sector in order to make Manitoba more attractive destination to large-scale event and convention organizers.

Survey Results Overview

In preparation for the summit session, several organizations in attendance completed an "Accommodations Summit Participant Questionnaire." The results of this survey were shared and briefly discussed.



There appeared to be some surprise at the number of organizations not currently using social media as a marketing tool. Communication channels such as face Book were identified as positive, accessible and inexpensive tools.

Barriers to usage appeared to be an inability to allot time to a social media presence, as well as the perception inadequate maintenance would reflect poorly on the business and thus, it's better to not engage at all.

It was acknowledged that Travel Manitoba and Tourism Winnipeg have offered social media training.

Trip Advisor

Participants were presented with a presentation concerning the intention of Travel Manitoba to utilize and endorse Trip Advisor.

- There were mixed reviews towards the Trip Advisor website. Many participants expressed concern about invalid reviews on Trip Advisor and the negative impact on business. Conversely, participants noted that not all posts are negative and that some travelers provide a truthful account of their travel experience.
- The comparatively narrow scope of Trip Advisor was also cited as a detriment. While most people post comments on their hotel, some participants would find more value if comments related to the whole experience.
- It was suggested that a summit be held on the role of Trip Advisor in Travel Manitoba's marketing efforts. Approximately one-third to one-half of those present at the summit session indicated their willingness to attend such an event.

Hotel Association of Manitoba – Online Booking Program Presentation

Participants were presented an introduction to the online booking program being used by the Hotel Association of Manitoba, which Travel Manitoba will also be promoting on its website.

- Some questions arose concerning how the booking system would be managed in the event that a property chooses not to be listed through the program.
- Participants wondered as to how prospective guests would be pushed to the website rather than booking through other means. Further, some participants anticipated that a direct booking system may jeopardize established relationships with travel agents, particularly those who have historically been successful in securing guests.

SWOT Exercise

Participants participated in an exercise to evaluate the strengths, weaknesses, opportunities and threats as they pertain to the accommodations sector.

Strengths & Opportunities

- Sector strengths tended to revolve around the perception that progress has occurred in recent years both with respect to technology and collaborative efforts. Indeed, the two key strengths identified by participants were the growth and strengthening of industry associations, and collaboration across hotels.
- Participants also recognized growth and development of attractions within Winnipeg specifically. The planned expansion of the Winnipeg Convention Center comes on the heels of the near completion of the Canadian Museum for Human Rights, with other infrastructure improvements including a new stadium and a resurgence of pride with the return of the Winnipeg Jets.
- Participants tended to attach considerable importance to tourism opportunities perceived to exist with respect to tourism and accommodations. Participant stated desire to see continued development of attractions, and encourage the development of experiential tourism product. Indeed, participants recognize the need for greater linkages between the accommodations sector and tourism attractions. One participant suggested that a "Disneyland philosophy" be adopted, whereby tourism attractions and amenities work collectively "to empty the pockets of visitors."
- Participants also confidently spoke of the palpable upbeat mood in Manitoba, and more specifically Winnipeg, due to improvements with civic amenities. There is a perceived opportunity to convert citizens into salespersons for the province.
- There is also an evident desire to build upon the existing positive relationships that exist across the accommodations sector in order to promote the benefits that the entire province derives from tourism activity.
- Participants also highlighted the importance of Travel Manitoba and its marketing budget as an opportunity to further develop tourism.

The table below provides a detailed list of strengths and opportunities identified by session participants. Items appearing in bold represent strengths and opportunities that are regarded

as being particularly important issue areas that can be influenced through the actions of the accommodations sector or by Travel Manitoba.

Strengths	Opportunities
<ul style="list-style-type: none"> • A lot of inventory – including newer. • Brand recognition – People very aware of the hotel chains, compared to past. • Renovation going on at properties. • Organizations whereby an industry can speak with one voice and talk to each other – e.g., the Hotel Association and the Bed and Breakfast Association. • Hotels work well as teams as hotels. • Progression of technology with better communication, research and intelligence tools, and new programs. • Decentralized decisions of independents. • Geographical locations – the ease of finding hotels in Manitoba compared to other places. • Development in Manitoba of tourist attractions e.g., museum • Manitoba ingenuity “We’re stingy and we’re tight and yet we do a lot.” • More community linkages; do better working together. • Advertising of the city as a whole, including: The Convention Centre, the CMHR, the Bombers and the Jets. Much in Winnipeg to attract people. • Manitoba immigration program. 	<ul style="list-style-type: none"> • Increase in current/future attractions – e.g., museum opening. • Opportunities to provide more experiential tourist offerings. • Travel Manitoba tourism marketing budget. • Increased positivity of citizens in Manitoba and Winnipeg. Everyone is a sales person for the province. Capitalize on that optimism. (Not a strength yet) • Hotel taxes (but no control of this issue) • The downtown and the airport are close compared to other cities. • More hotel-community linkages; attractions and accommodations facilities working better together. Need a Disneyland philosophy of “we’re all here to empty the pockets of visitors.” • Building local tourism capacity – products, ability to develop experiential tourism products. • Manitoba has a diverse geography that is in reach of several large cities. Promote ecotourism and cottage country. Top rated beaches 60 miles north of Winnipeg. (Can city inventory be tied to rural tourism opportunities?) • There is an opportunity to ask for more money. Need to repeatedly educate all three political parties on opportunities. • Align resources to signal to government that this industry is an asset and not a liability. Start with DMOs, restaurant association, hotel association, bed and breakfast association. • Need to promote what the tourism brings to Manitoba in terms of dollars and jobs. Should be an all-in effort, e.g., Newfoundland.

Weaknesses & Threats

- In citing a variety of tourism related weaknesses confronting the accommodations sector, participants tended to attach significant importance to issues surrounding brand awareness for both the province and for individual accommodations operators. Within this context participants stated the need for continued promotion of Manitoba and its tourism offerings.
- Participants were somewhat divided with respect to the issue of accommodations inventory in Manitoba. Some participants stated that there are an inadequate number of rooms and that the industry is fragmented, with the city of Winnipeg in particular lacking a critical mass of rooms in the downtown area. Others contended that any significant increase in inventory will only cause existing facilities to have a smaller market share.
- In terms of threats, the general economic climate appeared to be an underlying theme. There was also discussion of the manner in which American travelers are behaving due to border restrictions and the recently enhanced efforts of individual states to raise their tourism profile. Considerable importance was attached U.S. passport requirements, with participants observing that fewer younger Americans are traveling in Manitoba to instantly become of legal drinking age. Participants also fear that increased competition among accommodations providers may lead to a sector wide decline in pricing and the erosion of profit margins.

The table on the following page provides a detailed list of weaknesses and threats identified by session participants. Items appearing in bold represent weaknesses and threats that are regarded as being particularly important issue areas that can and need to be influenced through the actions of the accommodations sector or by Travel Manitoba.

Weaknesses	Threats
<ul style="list-style-type: none"> • Crumbling infrastructure – e.g., roads are terrible • Stigmatism attached to Winnipeg – weather, safety, mosquitoes, floods. “We’re living in the Old Testament.” • Manitoba’s brand in Canada, U.S. • Non-branding for smaller operations. “They figure that if I’m not branded, I’m no good. That’s my perception.” • Better known in international markets than in our own [Canadian market] • Well-known international brands are not here, such as Four Seasons and Starwood. It’s a weakness but an opportunity. (Disputed: Putting too much inventory into this marketplace could cause loss of existing businesses.) • New inventory is a weakness because not much changes. Fragmented inventory, conventions are looking for 2-3 large properties. New inventory has fewer than 120 rooms and is not serving the convention market. Located outside of downtown. • Air access to and within Manitoba – weak access to Winnipeg, none to Brandon. • High room taxes (Disputed: Could be an opportunity if used to enhance tourism.) • Small operators trying to build experiences face limitations in terms of insurance e.g. boat ride, airplane ride. 	<ul style="list-style-type: none"> • Crumbling infrastructure – e.g., roads • Other provinces have much deeper pockets for marketing tourism. • High end brand hotels might have an impact on ability to attract staff. Potential for labour shortages. • Border restrictions getting worse. Younger people under 21 are visiting less, young Americans don’t have passports. • The European economy is weakening. • Failure to fund efforts to educate the public as to the importance of tourism. • Lowering their rates for a larger share of business harms the sector as a whole, everyone will lose. • U.S. states putting more money into marketing. • Continued increase in the price of fuel

Marketing Assessment

Marketing Success Retrospective

Participants identified a number of region specific partnerships which were consistently characterized as being positive. A list of partnerships can be seen below:

- In one instance, a yellow airplane owned by the Commonwealth Air Training Museum was used, along with a steam engine, to serve as accommodations landmark. These historical pieces act as an icon for the business and were credited with raising awareness of the motel, with these artifacts being frequently photographed by travelers.
- Partnerships with other businesses and local attractions were identified as positive arrangements by a number of participants. Examples included partnering with Assensippi Ski Hill, a neighbouring ranch house café. Other partnerships included insurance programs and hosting travel writers from publications such as Lonely Planet.
- One creative participant indicated they have entered into a partnership with the Home Roots concert series, whereby a rotating schedule of musical talent is brought directly to the establishment.
- One participant raised the possibility of creating partnerships with Hutterite colonies due to the unique nature of this lifestyle and the possible interest that may exist among some travelers.

Travel Manitoba Impact

Several participants indicated that Travel Manitoba has been a resource to them. Some comments concerning the means by which this destination marketing organization serves the accommodations sector included:

- “We are relying on Travel Manitoba as experts in the field. They have been very active in consulting with their market base ..Their advertising has reflected what the client base is asking for.”
- “The border visitor centre.”
- “Travel trade and industry shows in the U.S. and Canada.”
- “Fam tours.”
- “Explore Manitoba – you recognize it and you know what to expect.”
- The use of Travel Manitoba’s website to post special events and to advertise in general was seen as a valuable component of a partnership with Travel Manitoba.
- Educational training and conferences which provide an overview on tourism were also cited as valuable Travel Manitoba contributions.

Future Marketing Activities

- Participants identified a relatively small number of geographic locations they would prefer to see targeted in future by Travel Manitoba. These included proximate American states, rural Manitoba, Saskatchewan and northern Ontario. There was also an evident desire to market Manitoba “staycations”.
- Participants endorsed the EQ research program, with some stating there may be benefits if the public were to be made aware of the program and encouraged to take the quiz.
- Front desk staff were also identified as valuable marketing resources for promoting Manitoba in other ways. Educating travelers as to events and attractions throughout the province was seen as an effective means to promote Manitoba. Additional suggestions included:
 - Replicating the airport’s Gold Wing Ambassadors, which were identified as a helpful tool, but potentially not in the most effective location. It was suggested that such a service might be better located at hotels.
 - Regular education seminars for front-line staff to inform these workers about Manitoba tourism experiences.

Marketing Success Projection

Participants were optimistic about the industry as a whole, with one participant remarking: “We’re heading in the right direction, we have a great deal to be proud of and it’s time Manitoba stood up.” Some specific issues mentioned as boding well for the future marketing efforts of Travel Manitoba and the tourism sector as a whole included:

- The move towards online marketing.
- The group effort of various industry sectors pitching in to sell Manitoba – collective optimism.
- Travel Manitoba’s commitment to adopting a consistent marketing message.
- The premier’s visit to China – promoting a big international market.

The general sense of optimism was, however, tempered by one participant who noted that the importance of the billion dollar travel industry in the province is not adequately reflected in the existing tourism marketing budget.

Canada/US Focus

- Participants reiterated earlier comments when asked directly whether Travel Manitoba's marketing budget should be primarily focused upon the Canadian or the US market. Participants identified border challenges with passports and the mood of American travelers as barriers to increased tourism from the U.S. There was a considerable level of agreement that Travel Manitoba should focus on promoting inter and intra-provincial tourism. In the words of one participant: "We should try to keep our Canadian citizens at home".
- Travel Manitoba noted that the Prizm research program has identified segments of Canadians who would be most open Travel Manitoba messaging, thus supporting the position of participants. Key segments included Albertan Authentic Experiencers who would likely be interested in experiences Manitoba has to offer.
- Mention was also made of recent instances of travelers from France and Chile visiting Churchill after seeing a television documentary. It was suggested that Travel Manitoba might shadow such broadcasts with advertisements.

Partnership Opportunities

Existing Partnerships

- Partnerships were repeatedly identified as a successful marketing tool: "In accommodations or restaurants, the successful ones are the ones that do those things" (build business and organizational partnerships). A few participants identified current partnerships with organizations such as the Manitoba Lodges and Outfitters association, local museums, and local artistic communities. It was, however, suggested that more could be done to promote the province by capitalizing on big name events and cultural organizations such as The Royal Winnipeg Ballet. Both Neil Young and the Winnipeg Jets were also mentioned as potential tourism partners.

Travel Manitoba Partnership Assessment

- Participants were asked to identify additional steps that could be taken by Travel Manitoba to support marketing efforts of the accommodations sector. There was some suggestion that a "blueprint" of potential partners or collaborators could be created to ensure that sectors that service travelers are involved in the marketing of Manitoba. Potentially building relationships with health and wellness centers, as well as hospitals was widely embraced by participants. Participants also once again reiterated the need for continued and increased partnerships with culture and heritage and sports organizations.

Association/Organization Partnerships

- A number of suggestions were offered by participants when presented with the possibility of creating tourism packages that include accommodation and attraction or event information. Some of these included:
 - Linkages to cultural events, such as exploring local Aboriginal culture or promoting Folklorama.
 - Working in conjunction with the Royal Winnipeg Ballet.
 - Bomber and Brandon Wheat Kings games were suggested as two sports-themed package ideas.
 - Developing packages to facilitate Staycations
 - University and college tours were identified as an opportunity to more meaningfully capitalize on an existing travel practice.
 - Coordination between provincial marketing bodies to promote inter-provincial tourism.
 - One participant noted there is currently a culinary package in the works with MAFRI.

- While the idea of facilitating packages was noted to have merit, it was also identified that packages do not always sell. The collaborative efforts require considerable money and effort on the side of the hotelier to produce. Any steps that might be taken to relieve the accommodations sector of the burden and risk of developing packages would be most welcome.

- Another potential option was presented whereby the customer would select from a short menu of activities in a “choose your own adventure” style of package assemblage.

Blue Sky

- Maintaining momentum with marketing ideas discussed here and at other meetings was identified as a goal. Some suggestions surrounding this included:
 - Follow-up summits, twice per year or quarterly.
 - Some form of interactive connectivity tool to keep the conversation going, such as a social media site for Travel Manitoba to share knowledge. Travel Manitoba staff took this opportunity to note that a Travel Manitoba service of this nature was discontinued due to lack of industry participation.
- It was suggested that the accommodations sector “stand up” to the government about the hotel tax and other budget cuts and to otherwise have the accommodations sector’s voice heard loud and clear.
- One participant requested that the proceeds from a one cent levy introduced on some categories of product purchases in Manitoba could be used to fund tourism marketing.
- There was also suggestion that means be found to improve roads and other provincial infrastructure in order to facilitate tourism travel.
- Develop international tourism.
 - “We need to be a gateway city like Vancouver or Toronto.” Subsidizing airlines was suggested as a partnership that might help on this front.
 - Asking the Premier to advocate travel partnerships within China. It was noted that the provincial government is targeting China for trade development and the tourism sector should capitalize on this opportunity.

Appendix I

Travel Manitoba Accommodations Facilitated Session

Facilitator's Guide

April 5, 2013

Fairmont Hotel

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9:00 AM

Module I — Introduction & Opening Exercise (90 minutes)

Agenda Setting (15 minutes)

Introduction today's objectives.

- (Refer to slide) Explanation of objectives:
 - Provide an overview of what Travel Manitoba is doing.
 - Discuss Accommodations sector marketing trends and marketing investments.
 - Identify tourism-related Accommodations sector activities.
 - Identify and define existing partnerships.
 - Brainstorm as to how Travel Manitoba can collaborate more efficiently with the Accommodations sector.

- (Refer to slide) Agenda.

- We are going to cover a great deal of subject matter, some of which we will move through quite quickly. If we are not discussing something as thoroughly as you would like, please jot down anything that you think is unfinished business and we will be sure to discuss the your concern towards the end of the day.

- Explain need for full and frank input and that all expressed views are equally valid and important. Discussions should be collegial and relaxed.

- Telephones on vibrate

Travel Manitoba Overview (10 minutes)

Colin Ferguson presents a high level overview of Travel Manitoba business plans and initiatives.

Overview Reaction (5 minutes)

- Did Colin present anything that came as a surprise to you or strike you as being particularly useful for your own purposes? How so?

- What aspect of Travel Manitoba's plan has the biggest implications for your own organization? In what way?

- Can you offer any advice or insights as to what could be done differently to improve the plans and initiatives presented by Colin?

9:30 AM

Opening Exercise (60 minutes)

- (Refer to slide & hand out paper for responses) I would like to place you in four groups with approximately 9 to 12 people in each. I have taken the liberty of placing you into groups. You are going to have approximately 30 minutes during which time you are going to discuss among yourselves 5 key questions.
 6. What is your core business?
 7. Who are your core customers?
 8. What kind of customer relations management tools do you use?
 9. Where do you see yourself relative to the tourism industry?
 10. What do you expect to achieve today?

Large Hotels 9 orgs/ 12 people	Large Hotels 10 orgs/12 people	Large Hotels 8orgs/11 people	Bed and Breakfast 8 orgs/9 people	Smaller / Rural 9 orgs/12 people
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- I realize that you may not achieve complete agreement within your group, but to the extent that there is consensus, I would like you to a report what it is. Additionally, if there are any major points on which you cannot see eye to eye, it would be valuable to hear about those diverging viewpoints as well.

- At the conclusion of your discussion you are going to elect a spokesperson for your table who will take approximately five minutes to provide the answers to the questions that were identified through your group discussion.

Participants present responses to questions.

(15 minute break at 10:30 AM)

10:45 AM

Module II — Presentations & Discussion (60 minutes)

Survey Results Overview (15 minutes)

In preparation for today, many of you completed an "Accommodations Summit Participant Questionnaire." We're just going to quickly review the results.

(Refer to slides)

- Is there anything in the results from this survey that surprises you?
- What is the most encouraging result? Is there anything else that is heartening?
- What result or results would you like to see improved over the course of the next two years?

Trip Advisor Presentation (10 minutes)

Doug Evans will present on Trip Advisor.

Overview Reaction (10 minutes)

- Has the presentation changed your opinion of Trip Advisor? How so?
- Do you have any comments regarding Travel Manitoba's plan to integrate Trip Advisor into its new website in 2014?

Manitoba Hotel Association Presentation (20 minutes)

Jim Baker will present on the HAC program.

Travel Manitoba is endorsing the Hotel Association of Canada online booking program and will be implementing it on the 2014 revised website. Jim Baker will be making a presentation to provide details on the program.

Overview Reaction (5 minutes)

- Do you have any questions for Jim?
- Do you have any comments on Travel Manitoba's endorsement of the HAC program?

11:45 AM

(45 minute break for lunch)

12:30 PM

Module III — SWOT Exercise (60 minutes)

SWOT Exercise

We are now going to conduct a well known exercise to evaluate various aspects of your respective organizations and the accommodations sector as a whole. As we go through this list of strengths, weaknesses, opportunities and threats, feel free to let me know if some of the things mentioned do not pertain to your own organization.

And to be clear, in order for this session to be optimally productive, I want to reinforce that we are discussing the strengths, weaknesses, opportunities and threats as they pertain to the Accommodations component of the tourism sector within Manitoba, rather than tourism in Manitoba more broadly speaking.

List SWOTs

Tourism Strengths

- As organizations, what things do you do well with respect to tourism?
- What knowledge, skills and attitude do you have that advance your organizations marketing objectives with respect to the tourism market?
- Can you point to examples of tourism successes that have been built upon strengths?

Tourism Weaknesses

- What doesn't the Accommodations sector do very well in Manitoba in terms of our tourism marketing?
- What tourism knowledge and skills do you feel you might be missing?

Tourism Opportunities

- What Accommodations sector tourism opportunities exist today?
- What could be done today that isn't being done with respect to the tourism market?
- What Accommodations sector tourism opportunities do you anticipate in the foreseeable future?

Tourism Threats

- What obstacles does Manitoba face with respect to tourism?
 - What might cause problems for Manitoba's Accommodations sector relative to the tourism industry in the future and how?
-
- (At easel) Not all strengths, weaknesses, opportunities and threats are created equally. Can we identify the strengths and opportunities that are most likely to have a meaningful positive impact upon Manitoba tourism?
 - (At easel) Can we identify the weaknesses and threats that are most likely to have a significant negative impact upon Manitoba tourism?

1:30 PM

Module IV — Marketing Assessment (45 minutes)

Marketing Success Retrospective

- (At easel) Looking back at the past year or two, I would like you to tell me how successful your tourism related marketing efforts have been?
- (At easel) What have been some of the factors, internal or external, that have contributed to the success in past tourism related marketing efforts? Why is that?
- Has Travel Manitoba been a resource to you?
- (At easel) What, if any, Travel Manitoba activities have value to your own marketing efforts?
- What other type of activities have you been involved with? (probe for: social media, efforts directed at tourism markets)

Future Marketing Activities

- (At easel) I'm sure that you each have your own specific interests and that we might have some divergent answers, but just so that we have a feel for what we're talking about, could you identify your primary target tourism markets? That is, which tourism markets would you ideally like your message to reach and affect in your future marketing efforts? (Probe for: geographical location, demographic makeup, psychographic profile)
- (At easel) What things can Travel Manitoba do to support you in your future marketing efforts?
- For many organizations marketing dollars are as scarce now as they have ever been. What can be done to make the most efficient use of existing marketing dollars?
- What else has to happen to do a better job of marketing your own organization to tourists?

Marketing Success Projection

- (At easel) What are some of the factors that have given you reason to be optimistic about your future tourism marketing efforts? Why is that?
- (At easel) What are some of the factors that have give you reason to be pessimistic about your future tourism marketing efforts? Why is that?
- Have you noticed any significant changes in the US and Canadian markets that you feel will have an impact on your future business?

2:15 PM (15 minute break)

Module IV — Partnership Opportunities (45 minutes)

Existing Partnerships

At this point, we have examined how tourism relates to your own operations and taken a look at the activities Travel Manitoba. We have also looked at the level of success you achieved with your marketing efforts and what you reasonably anticipate is going to be an outcome for the year ahead.

- (At easel) I would like to make a bit of an inventory of the key players involved in your activities and objectives. Who is it that you partner with success?
- What do you hope to achieve from this partnership?
- Which of these partnerships tends to be more successful? Why is that?
- Which are the barriers to partnerships? Why is that?

Travel Manitoba Partnership

- You will recall Collin's remarked this morning about partnership opportunities with Travel Manitoba. For those of you who have an existing partnership with Travel Manitoba, how satisfied are you with this partnership with Travel Manitoba? Why is that?
- (At easel) What more could Travel Manitoba do to support you in your marketing efforts?
- For those of you who do not have a partnership relationship with Travel Manitoba, would such a relationship be beneficial? How so?
- What would have to occur to a facilitate partnership with Travel Manitoba for those of you who wish to have one that currently do not?

Association/Organization Partnerships

I would like to know if any of you are interested in partnering with any other tourism related organizations in an effort to target a larger or new market or perhaps a different demographic.

- Do you partner with attractions, destination marketing organizations or regional tourism associations? Why/why not?
- What other organizations would make compatible partners for your tourism marketing efforts?
- How do you feel about being part of a tourism package that would include accommodation, attractions and events?
- (At easel) What would be some of the benefits that might be derived from partnerships with other tourism related organizations?
- (At easel) Are there any downsides or drawbacks of partnerships with other tourism related organizations? How so?
- Do any of you feel that you are left with the short end of the stick or are required to do the heavy lifting in a tourism partnership arrangement? How so?

3:15 PM

Module VI—Blue Sky Opportunity (15 minutes)

3 Categories

We have spent a great deal of time talking about your activities and objectives and the roles that are or might be played by Travel Manitoba and other organizations. I want to provide you with a chance to use your imagination and to also ensure that we don't miss anything critical.

We're going to have a little bit of a blue sky session where we throw out ideas. Just so that we can keep track of it like to classify these ideas into three broad categories.

- Marketing ideas.
 - Partnership ideas.
 - Additional ideas.
- What ideas do you have or what things would you like to see done differently?

Generate lists

3:30 PM

Module VII — Revisiting Objectives (15 minutes)

Fulfillment of Reasons for Being Here

At the beginning of the session, you wrote down on a piece of paper a potential outcome from our discussion today that you feel would be the greatest benefit to you. I'd like you to take a moment to read what you wrote down and think about whether or not that objective has been achieved.

- Is there anyone here who has an objective that requires further discussion?
- (If necessary) What kind of action would you like to see taken in order to address any outstanding issues you might have?
- Who should take the lead role in addressing this issue?

Unfinished Business

- Is there anything that you wish to raise that you feel is important, but was not discussed today?

Discuss as required.

3:45 PM

Thank and Dismiss Participants