

***Travel Manitoba
Culture and Heritage
Facilitated Session Summary
February 27, 2013***

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- Facilitator’s Guide
- Colin Ferguson Presentation

Background & Objectives

Travel Manitoba commissioned Probe Research, Inc. to facilitate a planning session among organizations representing the culture and heritage sector within Manitoba on February 27, 2013 at The Inn at the Forks in Winnipeg, Manitoba. Along with representatives of Travel Manitoba and Tourism Winnipeg, the Executive Director of the Manitoba Tourism Secretariat attended part of the session. The following culture and heritage organizations were represented at the session:

- Assiniboine Park Conservancy
- Association of MB Museums
- Brandon General Museum and Archives
- Cardinal Historical Project
- City of Winkler
- Commonwealth Air Training Plan Museum
- Festival du Voyageur
- Folklorama
- Manitoba Agricultural Museum
- Manitoba Ahbee
- Manitoba Arts Council
- Manitoba Baseball Hall of Fame & Museum
- The Manitoba Highland Gathering
- Manitoba Historical Society
- Manitoba Japanese Canadian Cultural Centre
- Manitoba Museum
- Mennonite Heritage Village
- Le Musée de Saint-Boniface Museum
- New Iceland Heritage Museum
- Parks Canada
- Pembina Valley Tourism Association
- Rainbow Stage
- Rivers West Red River Corridor & CDEM
- Royal Canadian Mint
- Royal Winnipeg Ballet
- RM of St. Laurent
- St. Laurent, Bilingual Service Center
- South Norfolk – Treherne CDC
- Tourism Winnipeg
- Tourisme Riel
- Western Canada Aviation Museum
- Winnipeg Art Gallery
- Winnipeg Comedy Festival , GSAC
- Winnipeg Folk Festival
- Winnipeg Juno Awards Host Committee
- Winnipeg Symphony Orchestra
- Winnipeg Railway Museum

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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Introduction & Agenda

Colin Ferguson established the tone for the day’s discussion after which the following list of objectives were presented to session participants:

- Overview of what Travel Manitoba is doing.
- Culture and heritage sector marketing trends and marketing investments.
- Identify tourism-related culture & heritage sector activities.
- Identify and define existing partnerships.
- Brainstorm as to how Travel Manitoba can collaborate more efficiently with the culture & heritage sector.

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.

Attraction/Arts	Regional Organizations	Museum/Historical	Special Event
<ul style="list-style-type: none"> • Assiniboine Park Conservancy (2) • Manitoba Arts Council (2) • Manitoba Museum • Parks Canada • Rainbow Stage • Royal Canadian Mint • RWB • Tourism Winnipeg • WAG • WSO 	<ul style="list-style-type: none"> • Cardinal Historical Project • City of Winkler • Rivers West Red River Corridor & CDEM • Pembina Valley Tourism Association • RM of St. Laurent, • St. Laurent, Bilingual Service Center • South Norfolk – Treherne CDC • Tourisme Riel • Tourism Winnipeg 	<ul style="list-style-type: none"> • Association of MB Museums • Brandon General Museum and Archives • Commonwealth Air Training Plan Museum • Manitoba Agricultural Museum • Manitoba Baseball Hall of Fame & Museum • Manitoba Historical Society • Manitoba Japanese Canadian Cultural Centre • Mennonite Heritage Village • Le Musée de Saint-Boniface Museum (2) • New Iceland Heritage Museum • Western Canada Aviation Museum • Winnipeg Railway Museum 	<ul style="list-style-type: none"> • Festival du Voyageur • Folklorama (2) • Manitoba Ahbee (2) • The Manitoba Highland Gathering • Tourism Winnipeg • Winnipeg Comedy Festival , GSAC • Winnipeg Folk Festival • Winnipeg Juno Awards Host Committee

Question Responses

- Core Business: In assessing core business elements, education was a recurring theme across culture and heritage organizations. Additional core business attributes varied considerably, but remained reasonably consistent within each of the four groups.
- Core Customers: Participants tended to cast a wide net in describing core customers. Most organizations tended to be Manitoba focused and most frequently identified families as constituting the core audience. Museums and historical enterprises, as well as festivals and events recognized a broader audience geographically, being more reliant on areas outside Manitoba for a significant portion of visitors.
- Customer Relations Management: There was considerable variation in the means by which organizations track visitors and customers. Attractions and arts organizations were more likely to report having a customer database and ticketing system which allows for some measure of tracking. Festivals and events indicated that they are able to develop audience databases to some extent, but this success is largely restricted to large groups of visitors. Other organizations, particularly museum and historical attractions, generally described lower levels of success in tracking their customer base.
- Relative to Tourism: Most participants view tourism as constituting a small portion of their organizational or business interests. Museums and historical organizations, as well as special events, attached comparatively greater importance to the role of the tourism.
- Expectations for the Day: Participants across organizations consistently viewed the facilitated session a means by which to gather information and understand how inter-organizational collaboration might occur. Participants also referenced acquiring new marketing ideas, and attempting to gain insights into marketing and industry best practices.

The table on the following page provides a more detailed account of the responses of provided through this group exercise.

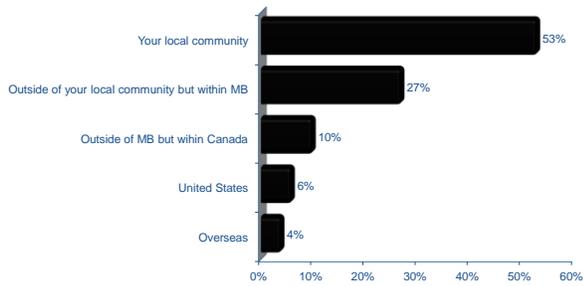
Attraction/Arts 12 orgs/14 people	Regional Organization 10 orgs/11 people	Museum/Historical 13 orgs/14 people	Special Event 9 orgs/12 people
<ol style="list-style-type: none"> 1. Education, research, creating experiences, providing fun to visitors, policy, preservation, engagement, protection/memories, “edugagement”. 2. Everybody: families, aged 12+, young artists/enthusiasts, organizations, new families, new Canadians (mostly Manitoba, not international). 3. Database (ticket system for data mining/ barcodes on membership/postal codes/prizm and EQ questionnaires), twitter & FB. 4. Is part of their business, approximately one-quarter from outside Winnipeg and one-in-seven from outside Manitoba coming to shows and events. 5. Learn from others, want culture and heritage to work together. Want to improve how we sell BIGGER FASTER LOUDER. Collaboration, consolidation, with a need for leaders to brag more. 	<ol style="list-style-type: none"> 1. Recreation, promotion of opportunities, education, economic development, receptive tour operators, restoration, event coordination, promotion of French culture and heritage. 2. Manitoba specific, but within that: adults/school groups, francophone for French organizations. 3. Some are managing customer relations and have database. Difficult for some because of Internet connectivity. 4. Participants see themselves as part of tourism industry in some aspect. Some have joined tourism associations and look to tourism industry for partnerships. 5. Case studies that might exist, best practices, tourism marketing, networking and sharing, development of opportunities or experiences: product development, francophone-collateral materials, availability of resources online from Travel Manitoba. 	<ol style="list-style-type: none"> 1. Museums, preservation, education, research, interpretation, libraries, archives. 2. Families, seniors, school groups, 50% are from outside Manitoba, tour groups, specific interest groups. 3. Tracking exit surveys (low success) guest book sign ins, tracking answers, customer satisfaction (low success). 4. Live or die by tourism activity– dependent on it, and integral to business. 5. Find a way to market to the soft and weak areas within Manitoba and out of province. Rebranding heritage as cool and current, learning about initiatives. Defining why sector is so important to the tourism industry and communicating this to those who supply funding. 	<ol style="list-style-type: none"> 1. Festivals/events, entertainment, culture, music and food. Core festivals we offer, but also looking to grow and have programming and events outside these core festivals. 2. Local, national, international. Leisure, group tours, meeting and conventions, sporting events. Winnipeggers and “staycations” are primary audience, but reaching out to rural Manitoba, Ont, Sask/N/S Ontario, United Kingdom. 3. Variety: databases based upon audience services, customer service. All have databases, tracking group tours is easier than individual patrons, website tools are looking towards, and social media, Google analytics, outreach to non-aboriginal markets. 4. Core business is tourism, and could be worked into partnerships. Organizations are all related and can look at other industries like transportation and hospitality to improve our experience. 5. Gaining more insight into other best practices and partnership opportunities.

Survey Results Overview

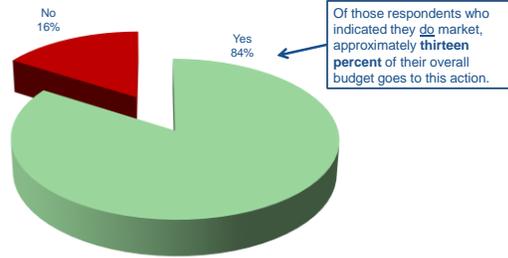
In preparation for the summit session, several organizations in attendance completed a "Cultural and Heritage Summit Participant Questionnaire." The results of this survey were shared and briefly discussed.

Customer Origin

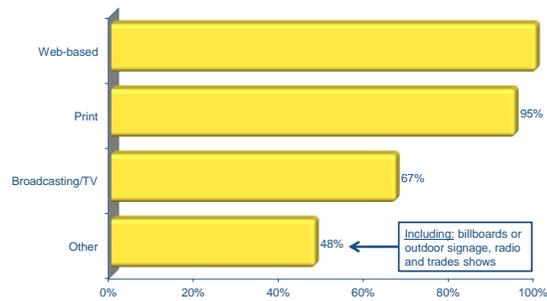
Q1. "When thinking about your customers over the past year, what percent would you say were from...?"



Do you actively market your organization?



What form of marketing do you do?



Do you partner with other organizations?

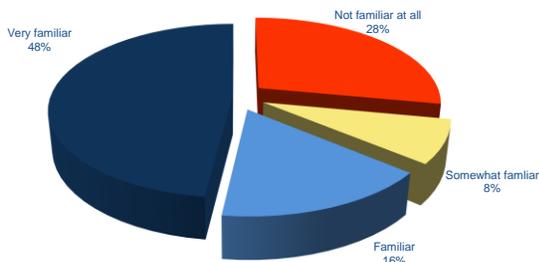
Q6. "Who do you partner with?"



Multiple responses were accepted – totals may exceed 100%

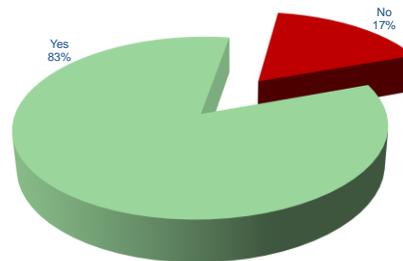
Familiarity with Advertising Partnerships

Q7. "Travel Manitoba subsidizes a variety of paid advertising partnership opportunities such as newspaper ads, banner ads, printed lure pieces and consumer shows. How familiar is your organization with these opportunities?"



Use of Partnership Opportunities

Q8. "Did you partner with Travel Manitoba on any partnership opportunities?"



Survey Reaction

- A concern was raised that the collective share of audience for culture and heritage attractions from outside Manitoba has remained relatively stagnant historically. While there was positive acknowledgement that Manitoba audiences are being maintained, one participant lamented "we're just selling to ourselves" and advocated for expanding marketing efforts beyond provincial boundaries.
- Some participants stated that they were pleased that Internet and social media were playing a more significant role in the marketing efforts of culture and heritage organizations.

Manitoba Culture and Heritage Attractions

Participants were also presented with a table showing various culture and heritage attractions in several categories within Manitoba in Winnipeg. These numbers were derived from databases existing at Travel Manitoba and Tourism Winnipeg.

- Several participants took issue with the number of attractions identified by Travel Manitoba and Tourism Winnipeg, stating that numbers in some categories were significantly underestimated. There was acknowledgment by both Travel Manitoba and Tourism Winnipeg that the figures were not accurate and suggested that such information could only be attained if culture and heritage sector organizations reliably provided information concerning attractions and facilities.
- Participants also advocated strongly for a category that identifies festivals as unique attractions within the province and suggested that such a distinction would serve to clarify the validity of the numbers within the table.



	Manitoba	Winnipeg
Museums	185	59
Art Galleries	20	11
National Historic Site	56	22
Performing Arts	10	8
Natural Point of Interest	14	2
Recreation	40	21
Roadside Attraction	14	1
Science/Research Centres	7	4
Garden	14	5
Religious	12	4
Tours	72	32

Travel Manitoba Overview

Colin Ferguson presented an overview of Travel Manitoba business plans and initiatives, including a discussion of partnership opportunities (see Appendix II).

Overview Reaction

- Participants remarked that there was a strong context for the promotion of Manitoba cultural and heritage attractions as they are among the oldest and most well established in Canada and North America. It was suggested that the prevailing perception of Manitoba as a prairie grassland could be supplanted with the image of a cultural centre. Some participants noted that a starting point for this type of reimagining must be the establishment of a dialogue among Manitobans and Winnipeggers to self-promote provincial assets.
- Participants advocated for the development of a plan whereby the extreme weather of Manitoba would be promoted and celebrated, rather than constituting a potential obstacle to visitation. Participants shared a handful of success stories concerning unique or extreme attributes, including an anecdote involving visitors from Oregon who had specifically traveled to Festival du Voyageur in order to experience this cultural event and a "real winter".
- In arguing the strengths of the culture and heritage tourism product, it was further stated that "Winnipeg is cool" within large urban markets such as New York market due to the past success of export products such as the symphony and ballet.
- It was noted that the perimeter highway surrounding Winnipeg does not currently present an opportunity to engage "drive-by traffic" and invite those who would otherwise pass by the city to stop and enjoy culture and heritage attractions.
- Some participants regard, the extensive population of former Manitobans as representing a significant and largely untapped tourism marketing network.
- In identifying gaps in the Travel Manitoba plan representatives of the French organizations noted that there is an absence of a Francophone marketing dimension to encourage Quebecers to be comfortable with the Manitoba tourism product.
- Participants stated that they are looking forward to the 2014 adoption of a tourism brand by the province to serve as a central theme for communications across sectors.

SWOT Exercise

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

Strengths & Opportunities

- Participants were most likely to cite the attitude and creativity of Manitoba as significant strengths, along with the belief that there is a long-established, high quality cultural product available the province.
- The opportunity to build upon and coordinate partnerships was a recurring theme. Specifically there was a desire to foster or create partnerships among both traditional and nontraditional relationships. Participants specifically mentioned VIA Rail as an

example of existing infrastructure which has a link to the tourism industry and would constitute a natural partner for the cultural and heritage sector.

- Participants were uncertain as to how the Canadian Museum for Human Rights will fit into a larger scheme of culture and heritage partnerships in Manitoba. Although participants believe that this attraction will draw visitors to Manitoba, there is uncertainty as to whether the CMHR will actively collaborate with other institutions to maximize tourism opportunities for the sector as a whole.
- Participants felt strongly that the 2014 development of a provincial tourism brand will provide an opportunity for an array of organizations to link under a common theme. There was broad acknowledgment that the new brand, whatever it might be, will be subjected to criticism. The collective advice of session members was for Travel Manitoba to stick with the 2014 brand in the face of such criticism. An alternate approach is likely lead to the continued inability of the province to clearly define its brand within the larger tourism marketplace.
- 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 culture and heritage sector or by Travel Manitoba.

Strengths	Opportunities
<ul style="list-style-type: none"> • Passion/Enthusiasm • Breeding ground for creativity • Multiculturalism • High quality cultural offerings with accessible prices • History • Volunteer commitment • Heritage rivers • Winnipeg is a big city with small community feel • Cultural oasis • Exchange district / Provencher –need to create visible districts 	<ul style="list-style-type: none"> • Coordination of partnerships • Better media coverage (internal/external) • Infrastructure partnership such as VIA Rail • Destinations outside Winnipeg • Intercept drive-thru market • Using CMHR as an anchor to extend length of stay and spin off to other activities/sites • Stick with a brand • Market to Quebec • Sector partnerships • Various arts councils • Under priced/valued • Destination tour itineraries • Product development • Experiential opportunities • Collaborating to maximize budgets • Brand individual experiences • Learn what tourism means • Market to Maritimes • Working groups to maintain synergy and continuity of thoughts presented here • CMHR

Weaknesses & Threats

- A lack of financial resources was evident as both a weakness and an ongoing threat to culture and heritage tourism. The current perception that there is insufficient dollars to adequately market tourism is exacerbated by fear of continued government cutbacks.
- Participants also noted that the culture and heritage sector is poorly coordinated and lacks a collective effort with respect to tourism. In part, this problem is seen as stemming from a poor understanding of the nature of tourism and its larger economic impact.
- Participants also voiced concerns that technological changes have eroded the traditional role of media in Manitoba and elsewhere. A struggling newspaper industry is confronted with reduced staffing levels and appears to be losing its ability and interest to offer tourism coverage or otherwise provide earned media.
- Concerns were voiced that some Manitoba tourism products require additional investments in order to meet industry standards. Participants, however, were unequivocal that this role was not one for which Travel Manitoba has responsibility, as there is a shared understanding that provincial DMO resources should exclusively be directed towards marketing.
- The table below 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 be influenced through the actions of the culture and heritage sector or by Travel Manitoba.

Weaknesses	Threats
<ul style="list-style-type: none"> • Silo style activities/lack of coordination • Lack of a provincial brand • Lack of marketing dollars • Culture and heritage sector does not understand tourism • Underpriced over delivered • Volunteer burn-out • Assets not utilized/promoted • Travel Manitoba has a Winnipeg focus • Community access and poor roads 	<ul style="list-style-type: none"> • Government retrenchment/cuts • Poor media coverage • Volunteer burn-out • Reduction of media/cuts to industry • Other cities are developing their culture and heritage images • Competing for funding with other NFP • Natural events media coverage (weather and mosquitos) • CMHR (uncertainty if a threat)

Marketing Assessment

Marketing Success Retrospective

- Several organizations indicated that they had difficulty gauging the success of past marketing efforts. The common challenge among participants was not knowing which of their various marketing efforts were responsible for increased visitation. Consequently, several events and attractions do not know the return on investment of their marketing efforts.
- On the whole, it appeared as though museums had a greater level of success in gauging the proportion of visitors who are tourists. One museum indicated that every visitor to their facility was asked where they lived.
- The Assiniboine Park Conservancy, stated that they have successful partnerships with both Tourism Winnipeg and Travel Manitoba and credit much of the success of website driven visitation to the profile provided by these two DMOs.
- Tourisme Riel indicated that it had considerable success with a geo-caching program in 2012 despite a late summer launch to this marketing effort. In addition to generating considerable interest, this program also allowed the success of the marketing effort to be tracked through program participation.
- Parks Canada reported experiencing success through community engagement. In particular, an initiative in Riding Mountain National Park developed “community ambassadors” to engage with a long-standing, but stagnant artists in residence program. The success of this effort has reenergized the community around the park and has grown to include "satellite" community involvement.

Marketing Success Considerations

- Participants placed considerable value on earned media as a preferred means of marketing within the constraints of a budget or limited marketing personnel. Indeed, there was a strong consensus among session participants that earned media yields greater benefits than purchased advertisements.
- Some participants stated that they are increasingly using Internet tools to gauge the success of marketing efforts. One participant advocated strongly for using Google analytics to identify Internet provider addresses and consequently determine where potential visitors may be located.

Travel Manitoba Impact

- Several organizations stated that various Travel Manitoba activities have added value to their own marketing efforts. Most notably, Travel Manitoba website banner ads and access to the *Winnipeg Free Press* Saturday travel page were described as being meaningful marketing efforts.
- Those organizations which had dealings with travel writers noted that these encounters were directly attributable to the provincial DMO. Other organizations stated that they likewise benefited from the opportunity to deal with media during breakfasts and familiarity tours through participation in the Travel Manitoba Featured Suppliers Program.

- Participants used the terms "flexible", "helpful" and "looking out for our interest" in describing Travel Manitoba's past efforts to assist with promotion and marketing. In the words of one participant: "They are enthusiastic and have a good sensibility for finding the right fit for certain organizations. They nurture us."

Social Media

- Organizations participating in the session reported the use of a variety of social media tools as part of a larger marketing effort. Virtually all culture and heritage organizations utilize Facebook, as well as maintaining an organizational webpage. Twitter proved to be less popular as this particular tool was seen as requiring a great deal of maintenance. Other social media used by at least some organizations included blogging, Reddit, YouTube and Pinterest.
- Participants frequently spoke of social media as a double-edged sword, whereby an absence of resources to maintain and provide regular updates could potentially be harmful to the image of the organization. Several participants suggested that additional monies would need to be available in order to more meaningfully access social media and other web-based tools.

Future Marketing Activities

- Session participants reiterated that they have broad and diverse markets of potential visitors. Specific market identified included:
 - *Families with kids, with the additional priority to engage future generations (several museums)*
 - *"International travelers" (Mennonite Village)*
 - *"Two target groups [French and English], they want to live an experience." (CDEM)*
 - *"Spanish population due to immigration and Maple Leaf population. We are looking to translate materials – bilingual will be Spanish from now on, not French." (Brandon General Museum and Archives)*
 - *"Non-aboriginal from a broad range, not just Winnipeg or Manitoba." (Manito Ahbee)*
- Travel Manitoba's role with respect to future culture and heritage marketing efforts was seen as providing the opportunity for collaborative efforts among organizations. Travel Manitoba was also seen as having a role in educating Manitobans, and potential visitors as to the significance and importance of the culture and heritage resources and attractions in the province.
- There was a broad desire for assurances that Travel Manitoba's marketing efforts do not duplicate those of Tourism Winnipeg. Participants described the need for synergy between these marketing entities with a request for continues efforts to be made to reduce overlap. An explanation by Travel Manitoba as to the complementary, yet distinct roles of these two destination marketing organizations was followed by an invitation for culture and heritage organizations to continue a dialogue with both DMOs in the event that any activities are perceived as being redundant.

Maximizing Marketing Budgets

- Cultural and heritage organizations indicated an interest in pooling resources with one another in order to maximize marketing dollars.
- At least one organization that is currently collecting postal code information stated that they use information concerning their existing visitor base to purchase advertisements in regional papers.
- Utilization of social media was widely regarded as an effective means of maximizing limited marketing dollars. At least some culture and heritage organizations regard, social media as a means by which to "extend the dialogue" from the pre-event experience to actual experience to event recollection.
- Some suggested that social media must be broadly embraced by cultural and heritage organizations whereby no single person within the organization is left with responsibility for social media. This "whole organization" engagement was seen as an effective approach in principal, but ultimately beyond the capacity of several events and attractions due to human resource limitations.
- There was considerable discussion about the developments of apps for individual culture and heritage organizations. Most organizations indicated that such tools would be useful and desirable, with a handful of organizations present in the room stating that they had created an app or are somewhere in the developmental phase, including:
 - Winnipeg Folk Festival
 - Assiniboine Park Conservancy
 - Parks Canada
 - Festival du Voyageur
 - CDEM.
- Although technical challenges may be a factor for some, the overriding obstacle to the development of such technology is cost. Subsequent discussion revealed considerable variation in the perception of costs associated with online application development. In the wake of information shared by participants some organizations appeared to have an interest in further investigating app development on their own or entering into discussions with other like-minded organizations concerning app development.

Marketing Success Projection

- Participants generally stated that they felt optimistic when looking toward future tourism marketing efforts. A large part of this positive sentiment stemmed from connections that were being made during the Travel Manitoba summit session itself.
- Some participants pointed out that despite the decline in traditional media channels the ever expanding array of web based options provides "an ever increasing toolkit". As one participant stated: "Never before in history have you been able to reach so many people for so little money."
- It was noted that limited resources have encouraged creative solutions and caused many organizations to focus their funds more intently on specific marketing efforts.
- Other participants based their optimism on the very significant "buzz" that exists around Manitoba concerning new attractions such as the Winnipeg Jets, the CMHR and the newly redeveloped zoo.

- Indeed, the only downside when anticipating future marketing success is the inability of many organizations to fund a dedicated marketing person.

Canada/US Focus

- Within the context of limited marketing resources there was a broad belief that Travel Manitoba's primary focus should be on the Canadian market. The poor economic climate in the US and American passport requirements were regarded as significant obstacles to travel and the growth of this southern market.
- Nevertheless, some advocated for a continued presence in the US in order to maintain whatever momentum has been generated by previous marketing efforts. More specifically, there was support for continued outreach to the "short haul" market given the historical success with these populations.
- There was the suggestion that the younger drinking age in Manitoba provides a meaningful basis for courting college age North Dakota visitors. There was a general sense that these excursions may also serve to familiarize younger American visitors with Manitoba and consequently pave for the way for later visits.

Partnership Opportunities

Existing Partnerships

- A great deal of importance is attached to partnerships as they allow organizations to have "an expanded footprint" which brings marketing and promotion efforts to a larger audience.
- When asked to identify existing partnerships, participants in the summit session described a long and varied list of relationships with community organizations and media, including:
 - *"Garden club in community. We provide the meeting space, and they look after our gardens." (Mennonite Heritage Museum)*
 - *"Like-minded organizations."*
 - *"Various municipalities."*
 - *"Mani-pogo and other festivals in general."*
 - *"Franco-Manitobain Cultural Centre."*
 - *"WSO and Ballet are being more collaborative."*
 - *"Larger arts organizations are collaborating more."*
 - *"Manitoba education"*
 - *"Academic communities at universities are a source of volunteers, bring in students and provide lectures."*
 - *"Manitoba Arts Network."*
 - *"Gimli Art Club."*
 - *"Community-minded companies allow us to barter for services or cheaper rates."*
- Participants also noted that the media continues to be a valued partner to cultural and heritage groups. French and rural media are particularly sympathetic to the objectives of tourism related marketing and regard such coverage as community building. For their part, English-speaking Winnipeg-based enterprises suggest that favourable and plentiful media coverage is more difficult to attain.

Future Partnerships

- Participants stated that many key partnerships have yet to be established between themselves. All present were in agreement with the suggestion that the contact information for all participating in the summit session be shared broadly in order to facilitate further dialogue and potential partnerships.
- Other future partnerships to which organizations aspire included the Canadian Museum for Human Rights. Participants reiterated that this institution remains "an unknown" in terms of its partnership potential, although cultural and heritage organizations remain hopeful. In the words of one participant: "The jury is still out on what the CMHR will mean for other tourism-related organizations."
- The newly amalgamated Manitoba Liquor and Lotteries is also seen as a desirable potential partner for cultural and heritage events and attractions. Some emphasized the ability of lottery revenues to support cultural and heritage endeavors, while others believe that existing casino tour groups provide a ready-made audience for other cultural attractions in Manitoba.
- IKEA was also identified as a retailer with an impact upon Manitoba tourism patterns. At least some participants stated that it would be desirable to establish a relationship with this Swedish retailer in order to connect with the many people it attracts to Manitoba.

Manitoba Museum Presentation

Javier Schwersensky presented a "Best Practices" case study.

- Javier cited personal and historical instances to emphasize the importance of collaboration in Manitoba. Building upon this theme the point was made that culture and heritage organizations in the province are not in competition with one another and ought to work collaboratively in order to attain mutually shared benefits.
- The importance of tourism to the provincial economy was noted and a more detailed explanation of the "Culture on Every Corner" website was provided.

Travel Manitoba Partnership Assessment

- Organizations which currently enjoy a Travel Manitoba partnership stated that they found this arrangement to be positive and supportive.
- There was a call from some culture and heritage organizations to develop a means of determining the effectiveness of Travel Manitoba marketing initiatives. For some, this meant identifying a method by which to track visitation for organizations that currently have no way of knowing the extent to which Travel Manitoba has an impact upon their audience. Conversely, Travel Manitoba is unable to accurately gauge the impact of its efforts in the absence of feedback from culture and heritage organizations as to the visitor patterns and demographics.
- Participants stated that the primary emphasis of Travel Manitoba should be to "bring the horses to water". The view here is that the promotion of individual organizations is secondary to attracting visitors to the province.
- Moving forward, participants expressed a desire for "open dialogue" in which Travel Manitoba is responsive to the needs of the culture and heritage sector. There was an evident desire for enhanced communication from Travel Manitoba. In the instances

where communication channels exist, there is a desire for greater awareness and understanding of these Travel Manitoba tools.

Blue Sky

Marketing/Partnerships/Other

- Given the opportunity to blue sky around marketing and partnership ideas, participants reiterated the need for collective advocacy and promotion of industry-wide objectives.
- Rural-based organizations in particular, stated that product development should be emphasized to a greater extent than was the case for Winnipeg based events and attractions. The concern expressed here is that there may be insufficient product to meet demand potentially created by a successful marketing campaign.
- Representatives of French cultural and heritage organizations emphasized the need for Francophone organizations to back fill gaps that might exist in larger provincial or regional marketing campaigns.
- Some participants advocated for "aligning product with demand is already there."
- Both the Royal Winnipeg Ballet and the Winnipeg Symphony Orchestra agreed to serve in an "ambassador" role to promote Manitoba tourism opportunities during upcoming tours, including an engagement in New York City.

Appendix I

Travel Manitoba Culture & Heritage Facilitated Session

**Facilitator's Guide
February 27, 2013**

Inn at The Forks, Forks Ballroom West

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8:45 AM

Module I — Introduction

Agenda Setting (10 minutes)

Introduction today's objectives.

- (Refer to slide) Explanation of objectives:
 - Overview of what Travel Manitoba is doing.
 - Culture and heritage sector marketing trends and marketing investments.
 - Identify tourism-related culture & heritage sector activities.
 - Identify and define existing partnerships.
 - Brainstorm as to how Travel Manitoba can collaborate more efficiently with the culture & heritage 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

Opening Exercise (50 minutes)

- (Refer to slide & hand out paper for responses) I would like to place you in four groups with approximately 11 to14 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?

Attraction/Arts 12 orgs/14 people	Regional Organization 10 orgs/11 people	Museum/Historical 13 orgs/14 people	Special Event 9 orgs/12 people
<ul style="list-style-type: none"> • Assiniboine Park Conservancy (2) • Manitoba Arts Council (2) • Manitoba Historical Society • Manitoba Museum • Parks Canada • Rainbow Stage • Royal Canadian Mint • RWB • Tourism Winnipeg • Travel Manitoba • WAG • WSO 	<ul style="list-style-type: none"> • Cardinal Historical Project • City of Winkler • Rivers West Red River Corridor & CDEM • Pembina Valley Tourism Association • RM of St. Laurent, • St. Laurent, Bilingual Service Center • South Norfolk – Treherne CDC • Tourisme Riel • Tourism Winnipeg • Travel Manitoba (2) 	<ul style="list-style-type: none"> • Association of MB Museums • Brandon General Museum and Archives • Commonwealth Air Training Plan Museum • Manitoba Agricultural Museum • Manitoba Baseball Hall of Fame & Museum • Manitoba Historical Society • Manitoba Japanese Canadian Cultural Centre • Mennonite Heritage Village • Le Musée de Saint-Boniface Museum (2) • New Iceland Heritage Museum • Travel Manitoba • Western Canada Aviation Museum • Winnipeg Railway Museum 	<ul style="list-style-type: none"> • Festival du Voyageur • Folklorama (2) • Manitoba Ahbee (2) • The Manitoba Highland Gathering • Tourism Winnipeg • Travel Manitoba (2) • Winnipeg Comedy Festival , GSAC • Winnipeg Folk Festival • Winnipeg Juno Awards Host Committee

- 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.

9:45 AM

Survey Results Overview (15 minutes)

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

(Refer to slides) We are also going to look at a final slide with a chart showing counts for various categories of attractions. The Manitoba numbers are taken from the Travel Manitoba database, while the Tourism Winnipeg numbers reflect the Tourism Winnipeg database count.

- Is there anything in the results from either of these two surveys that surprise 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?

Travel Manitoba Overview (30 minutes)

Colin Ferguson presents high level overview of business plans and initiatives, including discussion of partnership opportunities with Travel Manitoba.

(15 minute break at 10:30 AM)

Overview Reaction (15 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 or event? 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?

11 AM

Module II — SWOT Exercise (60 minutes)

SWOT Exercise

We are now going to conduct a well known exercise to evaluate various aspects of your respective organizations. 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 culture and heritage 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? Which organizations, attractions or events are doing a particularly good job?
- 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 culture and heritage 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 tourism opportunities exist today?
- What could be done today that isn't being done with respect to the tourism market?
- What 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 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?

Noon (30 minutes break for lunch)

Module III — Marketing Assessment (75 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 event or 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?

1:45 PM (15 minute break)

Module IV — Partnership Opportunities (75 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 in order to maximize your success?
- What do you hope to achieve from this partnership?
- Which of these partnerships tends to be more successful? Why is that?
- Which of these partnerships tend to present more of a challenge? Why is that?

Manitoba Museum Presentation (15 minutes)

Javier Schwersensky to present to present “Best Practices” case study.

- What are your comments about Javier’s presentation?
- Does Javier’s experience remind you of your own best practices? How so?

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 one another or any other organizations in an effort to target a larger or new market or perhaps a different demographic.

- Do you partner with destination marketing organizations or regional tourism associations? Why/why not?
- What form of partnerships with DMOs and RTAs are best suited to your organization or event?
- What other organizations would make compatible partners for your tourism marketing efforts?
- (At easel) What would be some of the benefits that might be derived from partnerships across Culture and Heritage organizations?
- (At easel) Are there any downsides or drawbacks of partnerships across Culture and Heritage organizations? How so?

3:15 PM

Module VI— Blue Sky Opportunity (30 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 like 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.

Marketing Ideas

- (At easel) What suggestions, innovations, or changes do you think could be made either to your own organization or Travel Manitoba in order to do a better job of marketing? Here, you may want to talk about your the specific market you intend to reach, how you intend to reach your market or some innovation you want to introduce in order to be more effective?

Generate list

Partnership Ideas

- (At easel) Broadly speaking, what types of organizations or individuals should be targeted for the purposes of partnerships?

Generate list

Additional Ideas

- (At easel) What other suggestions, innovations, or changes do you think could be made in order to make marketing your product easier or more effective?

Generate list

Prioritize the list using 2 dots.

3:45 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.

4 PM

Thank and Dismiss Participants

Appendix II

COLIN FERGUSON
SPEAKING NOTES
CHT SUMMIT
FEBRUARY 27, 2013

Good morning. It is really fantastic to have such an impressive group of people join us for today's session. I am looking forward to the discussions we will have today, and what we will learn and to hear your input on marketing, partnerships and other opportunities for collaboration.

I am going to take some time this morning to share with you information on tourism in Manitoba, Travel Manitoba and the ways in which we can work together. Collaboration, working together, is something this industry needs for success. From presenting a unified vision of what Manitoba offers visitors, to providing exceptional services and experiences across the province when they get here, further growth of tourism in Manitoba is reliant on a strategy that revolves around collaboration and partnership.

To begin, I'm going to talk a little bit about our plans and our role is in terms of the development of tourism in Manitoba.

Our vision, simply put, is for Travel Manitoba to lead the marketing and development of Manitoba's tourism industry. And as a Crown corporation established to foster development, growth and diversity in the tourism industry in Manitoba, we must lead the industry in creating a powerful provincial brand and bringing partners together to deliver on a provincial tourism strategy.

What does that mean in terms of Travel Manitoba's role?

Our primary role is to market and develop tourism experiences to a variety of audiences including encouraging Winnipeggers and Manitobans to travel within their own province, as well as attract those from neighbouring provinces, states and selected international markets. That said, we look to maximize and leverage the impact of collective marketing dollars by developing partnership opportunities with industry. Furthermore, we provide value to the industry by representing communities and experiences in markets where they do not have the resources to

sustain an independent market presence. We strive to provide consistent messaging for Manitoba in Canada and the international tourism marketplace. We support industry development initiatives to ensure our tourism industry is meeting the demands of today's travellers.

We to work with our industry partners in an effort to advise the provincial government and business community of the importance of tourism and the significant contribution it makes to Manitoba's economy and our quality of life, none more important than the role played by each of you, representing the visual and performing arts, museums, and more throughout Manitoba. Culture and heritage are one of the most important travel motivators, which is why this sector is so important to the success of growing Manitoba's tourism industry.

In the next few minutes, I want to take the opportunity to update you on Travel Manitoba, our role, our plans for the future and overall how the industry is performing.

In spite of very challenging economic times, tourism in Manitoba has experienced steady growth and is very close to rebounding to our record high levels for overnight visits in 2007.

As a major economic driver – with total visitor spending reaching \$1.26 billion in 2010 – the Conference Board of Canada's latest forecast indicates tourism in Manitoba will continue to grow, at an estimated, and aggressive, increase of 5.1% in total tourism spending in 2013. This growth is expected to continue into 2014 and 2015 as economic conditions continue to improve.

As you can see on the graphic, according to the latest statistics from 2010, tourism in Manitoba contributed close to \$1.3 billion to our economy with the majority of visitor spending, 61%, coming from residents travelling within the province. Our next most important market at 25% is other Canadian provinces visiting Manitoba, followed by the United States, a key international market, representing 10%.

Overseas markets contribute 4% to our overall revenues. But while this represents a small segment in terms of tourism visitation, they do represent a much higher spend per visit. Manitobans travelling within the province spend an average of \$105 per visit while overseas visitors spend \$698 per visit.

Economic uncertainty over the past six years has been one of the major factors influencing Manitoba's tourism performance. It has most certainly affected visitation from the U.S. and overseas, but also here at home in terms of visitation from other Canadian provinces and within Manitoba as well.

But, as you can see, there are other factors that pose challenges to our tourism industry.

Among the most pressing for us are:

- The extremely competitive tourism marketplace. Tourism is now one of the fastest growing sectors in the global economy. Today we have many new competitors, Ukraine, Croatia, Turkey all looking to encourage Canadians to travel outside of their home provinces and country. We too are beginning to see the impact of the well-funded, Obama-backed Brand USA campaign encouraging Americans to travel at home, and millions of others, including Canadians, to consider a US visit.
- Competition amongst Canadian provinces is increasing... Alberta, Newfoundland, BC, Quebec and more.
- Air Access continues to be a barrier to Canada and Manitoba
- Passport requirements are a challenge for our neighbours to the south. Less than 10% of all Americans have a passport, and that number decreases in markets such as North Dakota
- And, investment in tourism continues to be a challenge, with Manitoba occupying the lowest funding levels amongst all Canadian provinces, and significantly lower than our Saskatchewan neighbours.

We've set out six operating objectives in our business plan:

-lead the provincial tourism initiative

-significantly increase annual tourism expenditures in Manitoba to \$1.5 billion by 2016 and in doing so, increase our market share amongst other Canadian provinces and territories. How?

We aim to increase both visitation and the yield per visitor by extending length of stay and increasing visitation from long haul markets. We are confident that with all the new assets coming to market, including the Canadian Museum for Human Rights, expansions to exhibits at the Manitoba Museum and the Winnipeg Art Gallery, Journey to Churchill at Assiniboine Park Zoo, the expansion of the Winnipeg Convention Centre and many more, plus the unique tourism opportunities already in existence, we can move forward to rank 5th in Canada by the end of 2020.

We currently rank 7th in tourism expenditures and our goal is to follow only the big provinces of BC, Alberta, Ontario and Quebec. And while this may seem like we are settling for the middle of the pack, once achieved Manitoba would be generating more revenue than Nova Scotia and Saskatchewan, both of which receive considerably more in terms of provincial government investment.

A critical objective is to increase the level of investment in tourism marketing and development by governments and the private sector. With the expiry of special project funding that allowed us to expand our campaigns targeting international markets over the past three years, we have been faced with significant budget challenges. Funding over the next 3 to 4 years will remain soft, however, we have restructured the company to ensure we are maximizing our investment in marketing and media relations initiatives.

It is fundamental we build stronger relationships with industry, one more reason that events such as today's summit is so critical. Recognizing a need to improve our relationship with industry we revised our Industry Advisory Committees to be more focused.

We now have annual summits with travel trade, fishing and hunting, and today, our first with culture and heritage organizations.

Finally, we will establish a strong brand for Manitoba within Canada and internationally. This one is key. I will get into more detail regarding our anticipated brand later in this presentation.

In summary, and with these objectives in mind, our strategic priorities are to :

- lead marketing excellence
- strengthen industry relations
- collaborate to build a competitive tourism strategy

The key to marketing excellence is understanding who you are targeting. The more we know about our customers, or the type of people likely to become our customers, the better we can create experiences that appeal to them and messaging that speaks to them.

Travel Manitoba has invested in an exciting and innovative new research tool designed to help us better understand our customers, their likes and dislikes, and how our provincial tourism

experiences will impact their travel decisions. This research was created by the Canadian Tourism Commission and research firm Environics. Many of you may already be familiar with the tool called the Explorer Quotient, or EQ, which goes beyond traditional demographic research to find out why people travel and how their personal beliefs, social values and view of the world shape the travel decisions they make.

We are confident that EQ will not only help us at Travel Manitoba, but also our tourism industry operators as well, and will serve to align the industry under this innovative tool. It, too, is the backbone upon which our new provincial tourism brand is being developed, expected to launch in the spring of 2014.

Many of you are familiar with EQ, but for those who are not, the research identified nine different explorer types. They range from those individuals who wish to travel from the confines of their couch on television or on-line, to no-hassle travellers who want everything in place before they travel... Most likely those looking for an all-inclusive vacation or a cruise. After careful consultation with the industry and an exhaustive review of the available information, Manitoba will be developing a brand to target two specific traveller types... Authentic Experiencers and Cultural Explorers.

So, what is an Authentic Experiencer. They want the best of both worlds – vast natural settings and to immerse themselves in the local culture. These travellers want to learn, they are spontaneous, independent and open-minded. Manitoba's incredible accessible wilderness, natural settings and wildlife, as well as our rich culture displayed through our festivals, cultural institutions and diverse communities really speak to these people. They want an authentic experience, whether it's an arctic safari adventure of a lifetime or interacting with the locals at Gimli's Icelandic Festival.

Cultural Explorers, on the other hand, want to discover the entire experience of the culture, people and settings of the places they visit. And while they enjoy learning about a culture through a museum – they also want to participate in the modern-day culture as well. They go off the beaten track to find out how people truly live. Manitoba's diversity really captures the essence of what a cultural explorer is after – for example they can attend the Festival du Voyageur and learn about life as a fur trader, and then head down the street for a beer shared with locals while listening to modern-day Francophone music.

These two types of travellers both align with the characteristics of a “typical” cultural/heritage tourist. They want to learn something new, they want to do something new – they are open to immersive travel experiences.

With the power of EQ supporting our efforts, we’re able to have a more complete understanding of our customers. It also provides a common ground from which the entire Manitoba tourism industry can operate. So far our introduction of EQ to industry groups like yourselves has been extremely positive. Industry members quickly see the advantage EQ provides in product and market development, as well as marketing and advertising.

Regardless of whether it’s a small business, large tourism-based enterprise, or a destination marketing organization like Travel Manitoba, EQ provides a serious advantage in the competitive global travel market. And as industry adopts EQ for their own experience or product, we have the benefit of speaking to our customers using the same language, based on EQ.

While understanding our collective customers can help us to have a consistent message, another key to consistent messaging is industry support of that message. Travel Manitoba is developing a new brand for Manitoba, one that will resonate within Canada and internationally. The brand development is based on research that has been done for our past campaigns, as well as new research recently conducted with tourism industry stakeholders. Our advertising agency McKim Cringan George carried out a survey with members of our tourism industry – many of you would have been invited to participate.

The results of the survey back up existing research that the majority of customers are from Manitoba, and many are return visitors. Industry told us their customers like to immerse themselves in local culture and enjoy natural settings and the outdoors. When asked to describe Manitoba’s personality, the top responses were friendly and welcoming. However, while many respondents had a hard time identifying what they thought were Manitoba’s unique selling proposition... what sets us apart from every other travel destination, they were able to pick out two distinctive aspects that our research identified as unique aspects of our identity as a destination: they are... Manitoba as a cultural oasis and our accessible wilderness.

With these two aspects in mind, our agency has now turned their focus to developing the unique insights that connect these features to the customers... In other words, what about cultural oasis and accessible wilderness resonates with them and makes us stand out from the competition. This will result in a message that speaks directly to prospects and drives their interest in language and visuals that appeal to their EQ type.

One strong message about Manitoba is much more likely to have an impact than several divergent messages. And if Manitobans see themselves in our brand, then we have 1.2 million residents acting as ambassadors for our province – proud of, and excited about, what we have to offer and what makes Manitoba a unique place to visit. This is a considerable challenge.

Social media and the web have become more important factors in Travel Manitoba's marketing strategy. On-line is the consumer channel of choice. Robust websites are critical to generating high traffic to industry suppliers. Our team is more actively presenting experiences to potential visitors speaking on-line. The type of travellers looking for culture and heritage experiences are more likely to write about their trip on social media sites. We also are actively mentoring operators and provide assistance in delivering effective social media strategies.

Although our online marketing efforts have a global reach, our overall marketing plans are directed to a much more targeted audience. With limited resources, we have made a decision to concentrate our efforts on experiences and markets where Manitoba has a competitive advantage – where there is a desire to hear our message and act on it.

Our primary markets are:

Manitoba,
Ontario,
Saskatchewan,
Alberta,
North Dakota, and
Northern Minnesota

These are the markets that currently make up the vast majority of our total visitation, so this is where we already have a competitive advantage. Our secondary markets are:

Long haul U.S., meaning those U.S. markets where we are working directly with the travel trade and not necessarily consumers, as well as Germany, France and the United Kingdom.

These markets have proven to be very interested in our northern wildlife and cultural experiences as well as our world class hunting and fishing product. And interestingly enough, the majority of our fishing and hunting visitors also fall into Authentic Experiencer and Cultural Explorer types, meaning they are still have an inclination to learn and experience something new about the place they are visiting.

We also have our eye on some significant emerging markets, Australia, China and India. However, due to limited resources, we will not be proactively marketing in these markets, but rather investing in special projects with high return on investment potential, as well as partnering with the CTC who is taking our message to the select international markets, leading with their signature experiences collection. There are eight Manitoba experiences in the collection, which includes Manitoba cultural experiences the Pathways of the Voyageur at Aikens Lake Wilderness Lodge, a Prairie Legacy: the Bison and its People at Fort Whyte Alive and the Heartland International's Hermetic Code Tour of the Manitoba Legislative Building.

In fact, all of our signature experiences include some cultural or heritage element, from visiting the Eskimo Museum or Cape Merry Historic Site on a polar bear adventure in Churchill to sitting down to a homemade meal prepared with local ingredients on a Riding Mountain adventure. This just goes to show that you cannot have a signature experience without cultural elements.

Manitoba is filled with unique and authentic experiences, including our incredible arts, culture and heritage experiences. We have identified strategic market development opportunities to take advantage of the incredible range of Manitoba's tourism offerings. These include:

Winnipeg is emerging as an international destination thanks to significant investment in new and enhanced experiences, including the Canadian Museum for Human Rights (set to open in 2014) and the Journey to Churchill Exhibit at the Assiniboine Zoo. The return of the Winnipeg Jets and the opening of IKEA have also helped to put Winnipeg on the map. We will continue to work with our partners at Tourism Winnipeg to promote the city's new and growing status.

The student and youth market is a large segment, internationally representing 20% of global arrivals in 2010, and it is growing faster than any other segment (at 3 to 5% annually). Students and youth generally travel outside of high season. The CTC is developing an opportunity to activate youth travel by designating 2017 (Canada's 150th anniversary) as the Year of Youth Travel. The CTC research has identified that provinces and territories have the potential to offer truly extraordinary experiences to youth. The CTC is working towards an aggressive domestic campaign in 2017 aimed at stimulating pride in Canada and creating lifetime travel advocates. Travel Manitoba will establish a Youth Task Force this year to develop Manitoba's signature youth experiences. This initiative provides an opportunity to change perceptions about Manitoba and to leverage the efforts of the Canadian Museum for Human Rights in targeting the student and youth market.

The acquisition of major events is an important opportunity, as these not only have a significant economic impact, but are accompanied by significant media attention. We are working with our partners to acquire major events and will invest in the development of new events aimed at promoting Manitoba's culinary, music and festival attractions. Events on the horizon include the Juno's in Winnipeg 2014 and a bid for the Grey Cup in 2015 and the Canada Summer Games in 2017.

There is a demand for authentic Aboriginal tourism experiences, especially from overseas markets and Manitoba certainly has the ability to provide high-quality culture experiences. The Department of Culture, Heritage and Tourism is working with aboriginal tourism providers to develop experiences that exceed visitor expectations. Travel Manitoba's role is to market these experiences once they are market-ready. These include the Manito Ahbee Festival, the Pimachiowin Aki World Heritage Project, and the Waabanong Anishinaabe Interpretive and Learning Centre.

Another key priority of Travel Manitoba is to work more efficiently with our industry partners. We have a strong working partnership with many industry operators who participate in our marketing programs. Our goal is to increase annual investment in tourism marketing through business partnerships. Our partnership program offers subsidized advertising opportunities to partners, which provide the resources that allow us to extend the reach of our marketing campaigns.

We offer a wide variety of options, from print and web ads, to sponsored editorial or a video featuring our polar bear mascot, Toba, visiting your attraction or experience. There are options for as little as a few hundred dollars so that all tourism operators have the opportunity to participate in Travel Manitoba marketing. All revenues from the partnership program are reinvested in marketing programming. We are also pursuing some “non-traditional partnerships”, such as financial institutions and telecommunications companies to further increase our marketing budget.

And as important as private businesses are to our success, Travel Manitoba recognizes that the Government of Manitoba is its primary stakeholder. A stronger relationship with senior levels across government is needed in an effort to better educate government on the potential of the tourism industry and how tourism growth can help support key provincial priorities. For example, generating more tourism tax revenues will provide more resources for governments’ top priorities in health care or education, as well as creating more jobs for Manitobans.

We must communicate the importance of cultural tourism as not only an economic driver, but was a way to promote the preservation and protection of significant local resources and local traditions, and as a way to help develop and maintain new and existing community amenities.

We work closely with the Tourism Secretariat and the Department of Culture Heritage and Tourism to encourage a “whole of government” approach to tourism – ensuring that the provincial departments and agencies that provide significant support for tourism through funded programs and through direct control and operation of tourism attractions fully understand the impact of tourism and are engaged with Travel Manitoba.

By providing bi-annual progress reports to the Minister of Tourism and meeting on an annual basis with the Premier, we can ensure provincial engagement on key priorities. The Premier’s Economic Advisory Council established a Task Force on Tourism – The recommendations from the PAEC advisory are now beginning to surface and soon implemented. More information to follow on this front.

In addition to reaching out to the government with the power of tourism message, it is also essential to share that message with other tourism stakeholders and the general business community. Last year I made 20 presentations to different groups speaking about the potential

of tourism and am sharing that message on a weekly basis with listeners of the CJOB's Business Report, a radio show sponsored by the Winnipeg Chamber of Commerce that covers a range of Tourism business-related topics as well as provides an opportunity to shamelessly promote activities and events throughout the province every two weeks.

Our final strategic priority is collaborating to build a competitive Tourism Strategy. The department of Culture, Heritage and Tourism has announced that the government will be working with Travel Manitoba to build a provincial tourism marketing and development strategy. We are confident that a collaborative process will revitalize partnerships among industry partners and political leaders.

There is tremendous potential for tourism in Manitoba. I see it, I believe you see it as well. We're excited about the future and what EQ and a new brand will mean for tourism in Manitoba. Cultural and heritage activities have the highest participation rates of all tourism activities after shopping and dining for Canadian and US travellers. Which means that when we factor in new attractions, including tourism "game changers" as coined by the CTC such as the Canadian Museum for Human Rights, the incredible renaissance now happening at Assiniboine Park, the Upper Fort Garry development, expansions to the Whiteshell and Birds Hill Provincial Parks and the proposed UNESCO World Heritage designation of our east-side boreal forest, and of course the work each of your organizations is doing to contribute to growing our tourism industry, we are positioned to attract even more visitors to Manitoba. This an exciting time for Manitoba and for Manitobans.

To close, I would just like to again thank you all for joining us. I am looking forward to a productive day with lots of open, honest discussion.

End of presentation.