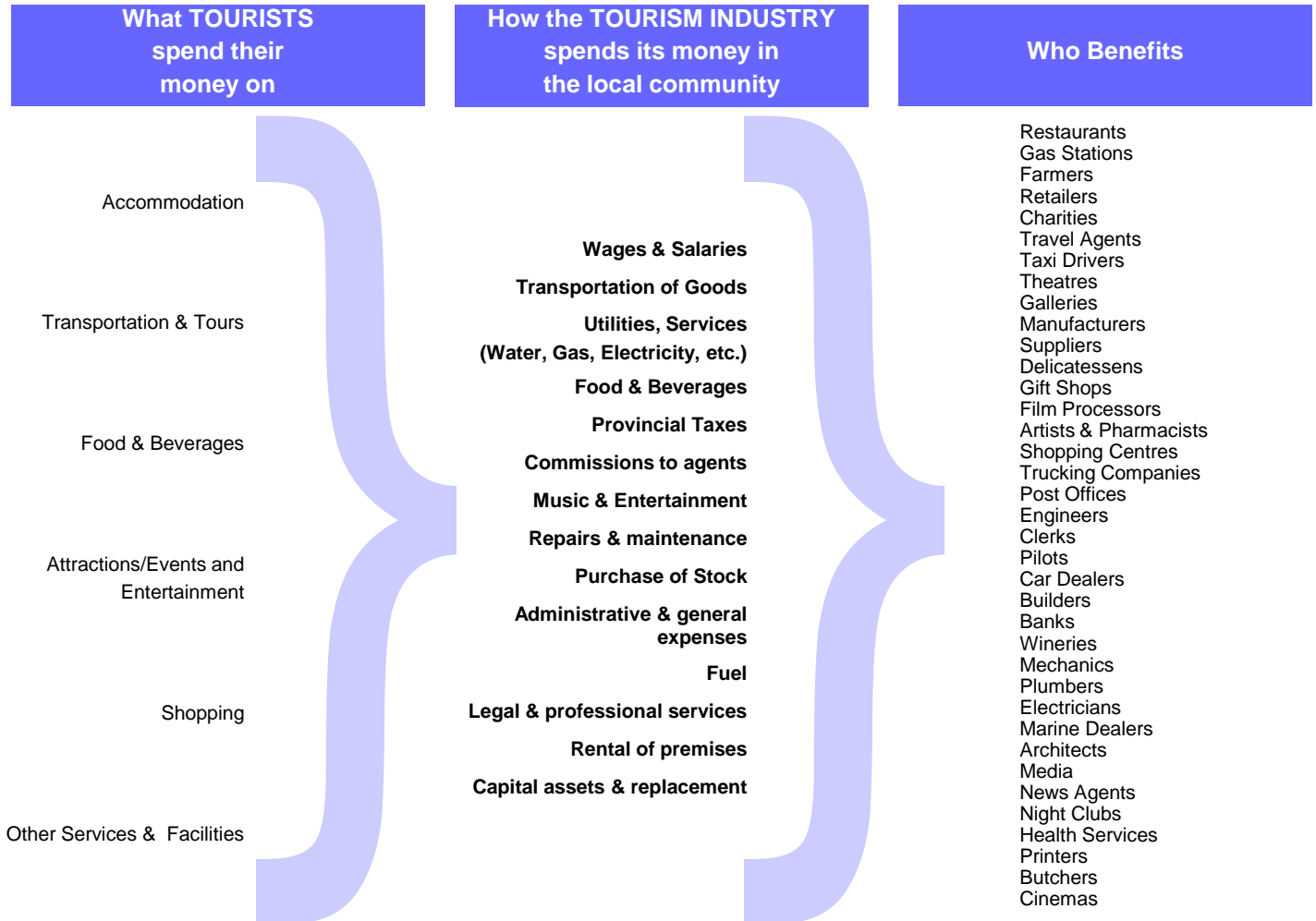
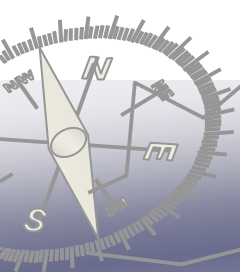


The Benefits of Tourism

The Benefits of Tourism

- Diversification of tourism industry infrastructure
- Contributions to the balance of payments
- Increase in tax revenues
- Improved job opportunities
- Improved income of residents
- Improved shopping facilities
- Improved transportation and communications
- Improved medical facilities
- Improved cultural facilities
- Improved recreational facilities
- A feeling of pride
- Favourable changes in our lifestyles
- Improved quality of various services (e.g. hotels, restaurants, shops)

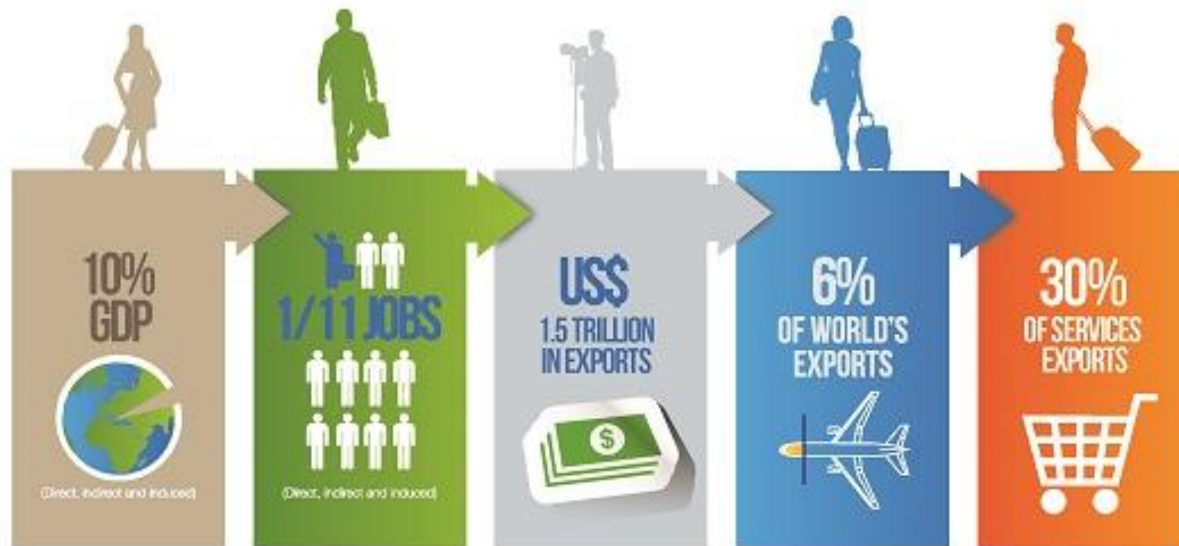




The Value of Tourism

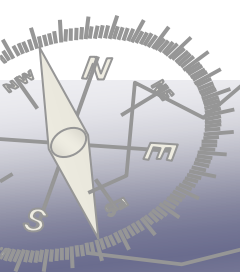
The World

- \$1,245 billion (USD) (2014) Int'l Receipts
- Leisure accounts for 53% of all international travel



WHY TOURISM MATTERS

© World Tourism Organization (UNWTO) 2015



The Value of Tourism

Manitoba

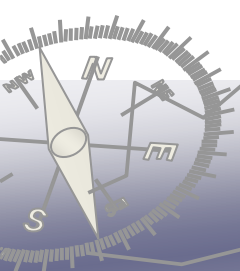
- 2.8% of GDP¹ (2014)
- Export revenue is \$589.4 million (2014)
- Direct tourism jobs² 12,900 (2014)

2014 Total Taxes Contributed by Tourism Wages and Expenditures²

| | |
|--------------------|-------------------------|
| ▪ Federal taxes | \$ 285.7 million (46%) |
| ▪ Provincial taxes | \$ 276.2 million (44%) |
| ▪ Municipal taxes | \$ 63.2 million (10%) |
| ▪ Total | \$ 625.1 million |

1: Statistics Canada: Real gross domestic product, expenditure-based table
(<http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/econ50-eng.htm>)

2: Canadian Tourism Research Institute - Tourism Economic Impact Model (TEAM) using 2014 tourism expenditure estimates from Statistics Canada's Travel Survey of Resident of Canada and International Travel Survey.



Tourism and Hospitality Related Establishments in Manitoba

Travel Manitoba



| Description of Sector | Number of Tourism & Hospitality Related Establishments ^{3,4} | | % Change | % Total 2015 |
|---|---|---------------|-------------|--------------|
| | 2014 | 2015 | | |
| Tourism Related Transportation ¹ | 1,338 | 1,401 | 4.7% | 12.8% |
| Performing Arts, Spectator Sports and Related Industries | 3,812 | 3,906 | 2.5% | 35.8% |
| Heritage Institutions | 118 | 120 | 1.7% | 1.1% |
| Amusement, Gambling and Recreation Industries | 1,095 | 1,127 | 2.9% | 10.3% |
| Accommodation Services | 1,093 | 1,071 | -2.0% | 9.8% |
| Food Services and Drinking Places | 2,847 | 2,897 | 1.8% | 26.5% |
| Travel Arrangement & Reservation Service | 400 | 399 | -0.2% | 3.7% |
| Total Tourism and Hospitality Related Establishments | 10,703 | 10,921 | 2.0% | 100% |

Footnotes:

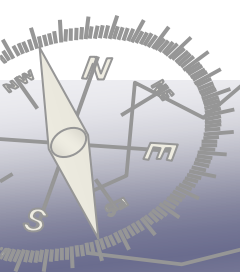
1 Tourism Related Transportation includes: Air Transportation - Scheduled, Air Transportation - Non Scheduled, Inter Urban & Rural Bus Transportation, Taxi & Limo Service, Charter Bus Industry, Scenic and Sightseeing Transportation.

2 NAICS: North America Industry Classification System.

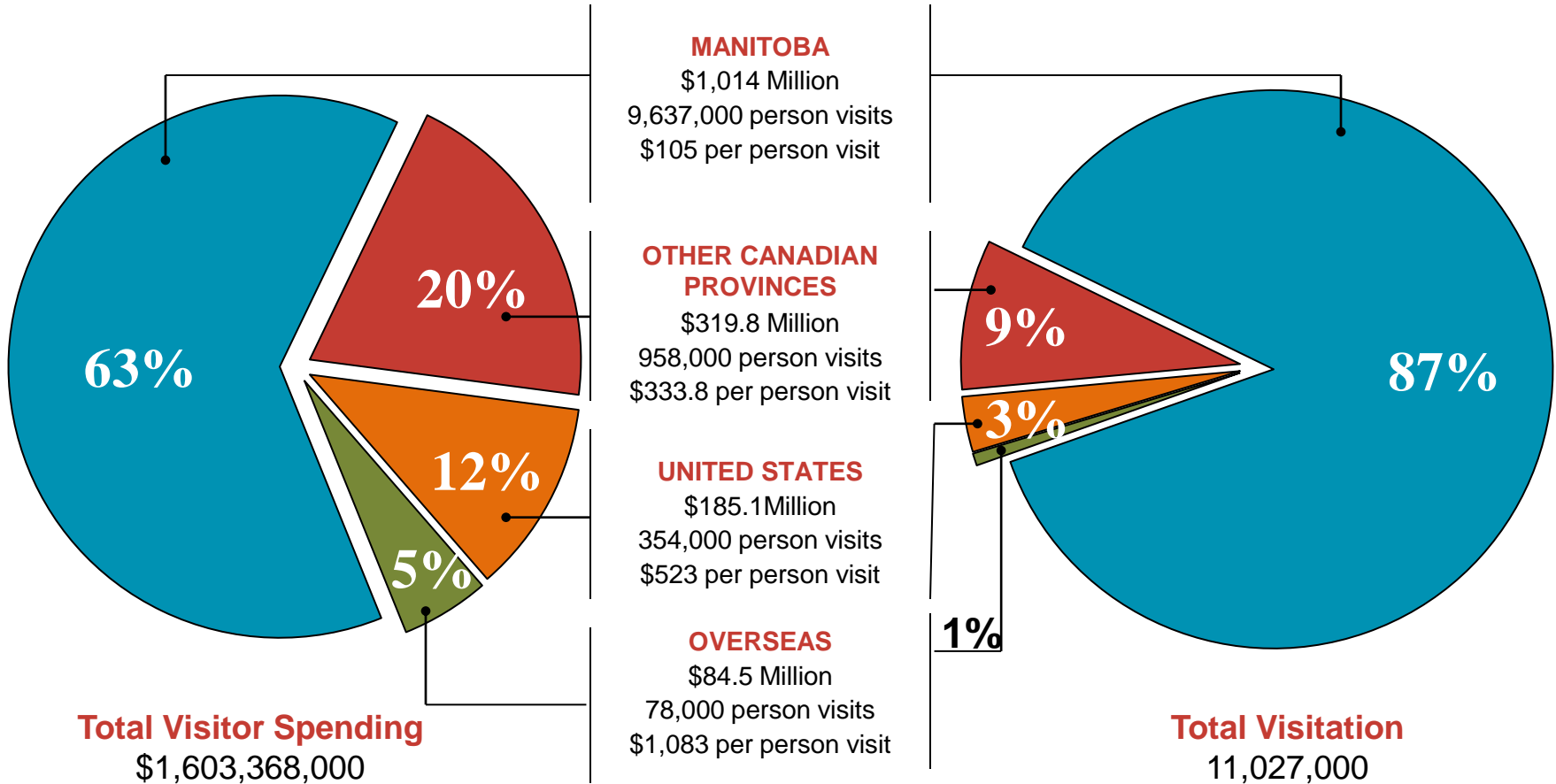
3 For statistical purposes, an "establishment" is defined as the smallest unit of a company (whether sole proprietorship, partnership, co-operative, corporation, etc.) that is a separate operating entity capable of reporting all elements of basic industrial statistics.

4 A number of changes that occurred for the December 2014 reference period resulted in a significant increase in the total number of businesses in Canada. The changes are made in an effort to be more coherent with our definition. For further information, please refer to the Statistics Canada document, "Definitions and Concepts used in the Business Register".

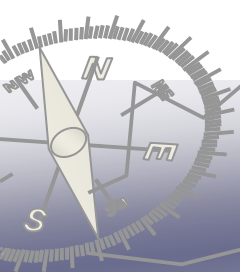
Source: Manitoba Bureau of Statistics & Manitoba Business Registry, December 2014 and December 2015.



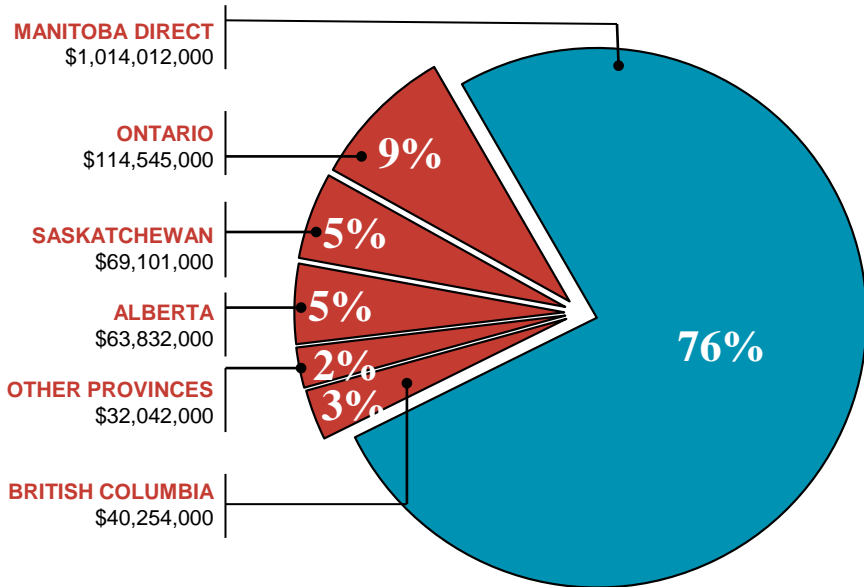
Visitor Spending & Visitation Overall 2014



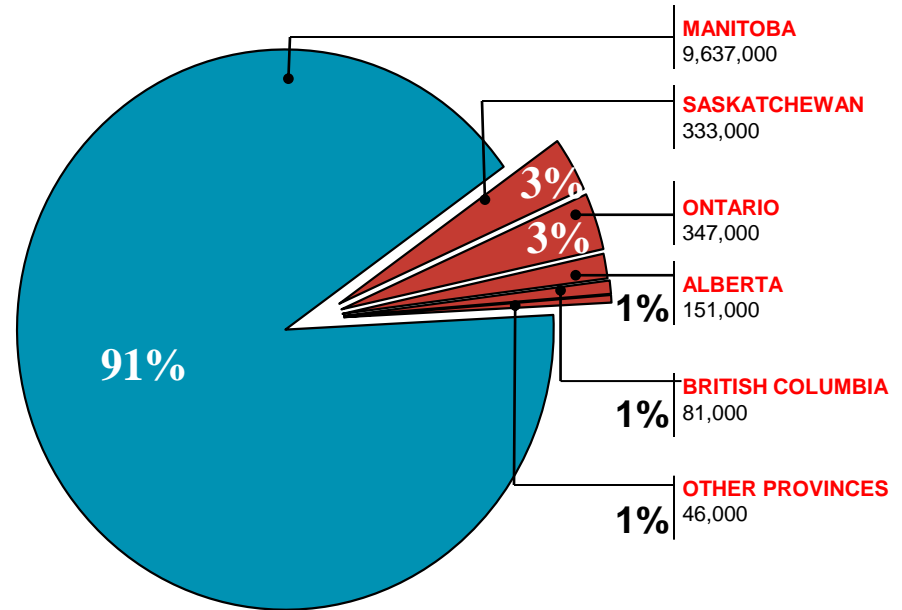
Source: Statistics Canada – Travel Survey of Resident of Canada (TSRC) and International Travel Survey (ITS), Research Resolutions – 2014 Detailed Tabulations.



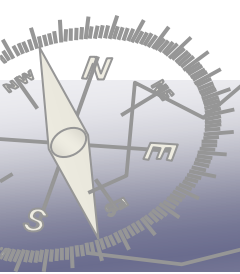
Visitor Spending & Visitation by Province 2014



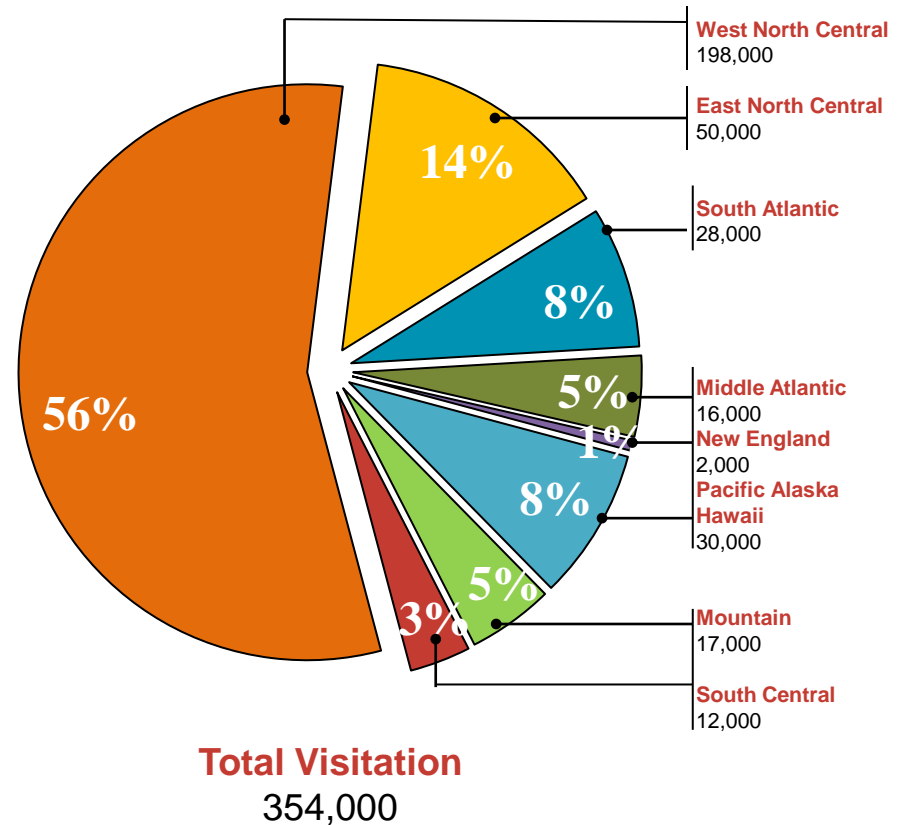
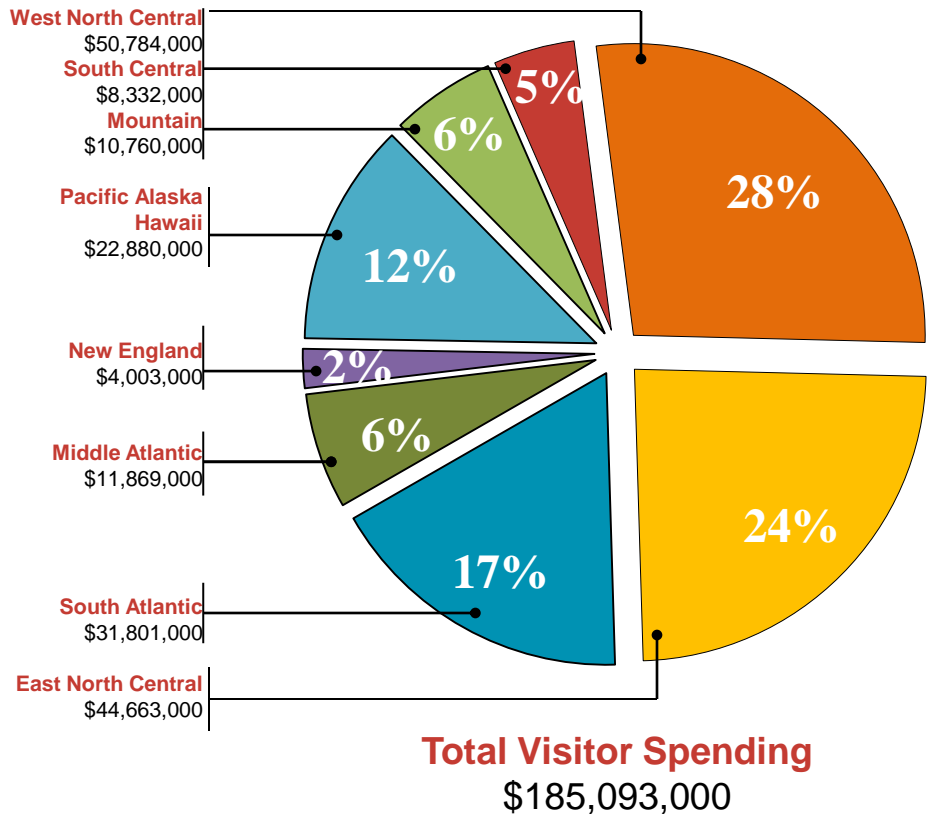
Total Visitor Spending
\$1,333,786,000

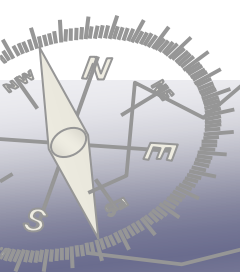


Total Visitation
10,595,000

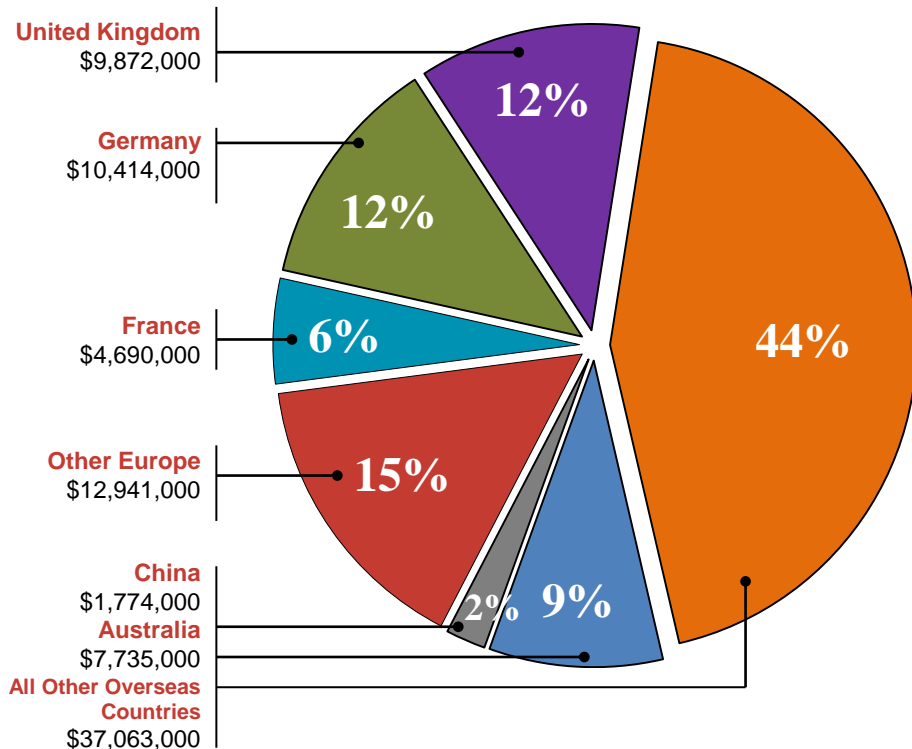


Visitor Spending & Visitation by State 2014

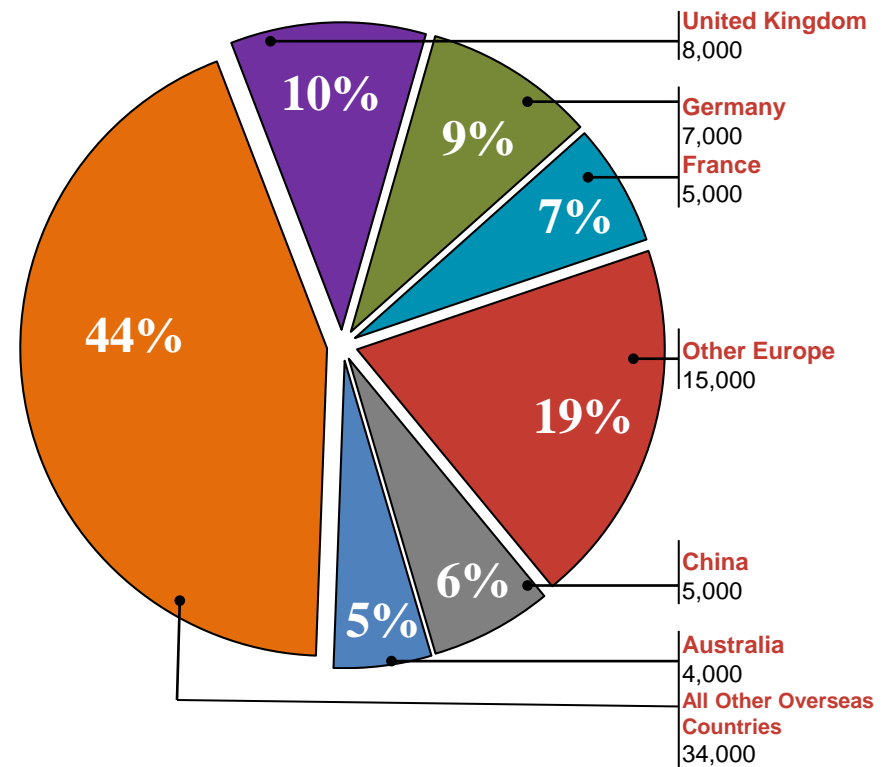




Visitor Spending & Visitation by Country 2014



Total Visitor Spending
\$84,489,000



Total Visitation
78,000