

Travel Manitoba International Marketing Summit Report

Prepared for
Travel Manitoba
May 2014



RESEARCH INC.

...for what you need to know.

For more information on this research project, please contact:

Probe Research Inc.

Suite 850 – 125 Garry Street | Winnipeg, MB R3C 3P2

Tel: (204) 926-6565 | Fax: (204) 926-6566

E-mail: probe@probe-research.com

TABLE OF CONTENTS

Background & Objectives.....	3
Agenda Setting.....	4
Travel Manitoba Overview.....	4
Marketing Year in Review	4
Measuring Success (50 minutes)	5
Questionnaire Assessment	7
2014/15 International Marketing Campaign Plans.....	10
Strategic Issues Discussion.....	11
“Off the Wall” Partnership Ideas	13
Travel Manitoba Marketing Assessment	15
Unfinished Business / Wrap-up	15

Appendices

- ✓ Facilitator’s Guide
- ✓ Colin Ferguson Overview

Background & Objectives

Travel Manitoba commissioned Probe Research Inc. to facilitate a planning session among Manitoba the International marketing sector on May 15, 2014. This discussion covered a number of topics, including participant views on the most recent Travel Manitoba Brand and current campaign, as well as the development of sector specific marketing ideas. This planning session was the fourth annual gathering of the International marketing sector and Travel Manitoba personnel.

The five-hour discussion was facilitated by Lloyd Fridfinnson, Vice President at Probe Research and followed a guide prepared in consultation with Travel Manitoba (See Appendix I). The session proceedings were documented by Kevin McDougald of Probe Research. A number of participants representing various business interests and marketing organizations were present alongside Travel Manitoba personnel.

For more information on this research project, please contact Lloyd Fridfinnson, Vice President at:

Probe Research Inc.
Suite 850 – 125 Garry Street
Winnipeg, Manitoba
R3C 3P2
T: 204-926-6565
E: Lloyd@probe-research.com

Agenda Setting

At the outset of the discussion, participants were presented with objectives for the day's discussions, specifically:

- To present the results and receive feedback on the 2013/14 International Marketing initiatives.
- To improve the collective understanding of who Manitoba's existing international customers are.
- To seek input into planning the 2015 International Marketing campaign.

Travel Manitoba Overview

Colin Ferguson, President and CEO of Travel Manitoba, provided an overview of Travel Manitoba's new brand "Manitoba: Canada's Heart Beats" (Colin Ferguson's full presentation is available in Appendix II). Key points highlighted included:

- Travel Manitoba's new tourism brand is a source of pride and immediately resonated with industry. The new brand is seen by industry as a one which they can get behind. Reaction from the business community has been overwhelming.
- Reaction from often critical media has been largely positive.
- Website traffic spiked on day that new ads were uploaded.
- Arctic safaris, fly-in fishing, wilderness adventures are key international products.
- The benefits of the brand launch for International Marketing include partnering with the Canadian Tourism Commission this year on four events.

Marketing Year in Review

Cathy Senecal presented an overview of her activities during the past 12 months, noting the following key points.

- Cathy's key role is to build relations with at events and marketplaces within a fragmented media environment (particularly in North America).
- The media tour program, in which media come to Manitoba, is extremely important to Travel Manitoba, providing millions of dollars of exposure. The goal is to build interest at events to get media to come to Manitoba.
- The distinction was made between owned media ("stuff that we own") and earned media (exposure in other outlets). The point was made that earned media is becoming one of most effective ways to generate leads and web traffic. Earned media tends to be viewed as more credible as the public is more inclined to believe an article than an advertisement. Approximately 425 articles can be attributed to this media outreach. Additionally, more than 30 news articles have been generated by releases from as far away as Germany, Australia and Brazil.

- The United Kingdom is the largest source of European travelers to Manitoba, with Germany being the second-largest source. Germans tend to prefer fly-in lodge options.

Dene Sinclair also provided an overview of her marketing activities during the past 12 months, noting the following key points.

- It was explained that this Travel Trade department explores new markets and exists to support what Manitoba industry is doing on their own. The department seeks to increase communication to both its Manitoba partners, as well as the broader marketplace across the world.
- Activities included visiting six countries last year, with more than 300 sales appointments. Additionally, the department hosted 30 guests from the United States and several from Canada.
- Growth from the United Kingdom is continuing to be seen, based on an annual product audit showing 83 tour operators carrying Manitoba products in 2013-14. Joint marketing agreements in the United Kingdom included Thomas Cook during the past year.
- Carriage of Manitoba product has remained at approximately 30 providers in German-speaking Europe; Germany, Switzerland and Austria. There were no sales mission to Germany last year, but some guests stopped over in Winnipeg.
- The Canada Specialist Training Program in France includes exposure to Manitoba. There is currently no sales mission to France, but eight “found guests” paid visits to the province.

Measuring Success (50 minutes)

Doug Evans explained indicators of success, with the main points of the presentation being:

- International traffic was 25% of Travel Manitoba’s website traffic last year.
- A great deal of time and effort has been invested in the launch of the new Travel Manitoba website. Efforts have been made to make international languages more accessible, with the German section of website in particular becoming more robust. The German section accounted for four percent of visitors.
- The United States, United Kingdom and Germany are the main international audiences for the website. International visitors engaged much more with the site during the past year and page visits are up, while bounces are down approximately 30 percent.
- Travel Manitoba was engaged with both the CTC and National Geographic. The latter campaign was focused on “Everything Churchill” website. These efforts generated strong traffic from the United Kingdom. Most of the online traffic from Germany was also generated by National Geographic campaign, which represented 62 percent of total traffic.
- “Everything Churchill” still largely receives Canada/U.S. visitation, which is almost evenly split between the two countries.

- Additional events and efforts also had an impact upon website visitation. Strong traffic was driven by a BBC news article on the man who fought off polar bear with a cellphone. The Toronto Maple Leafs campaign was also a good traffic generator.
- Nevertheless, 80 to 90 percent of website traffic is from within Manitoba.

Rick Gaunt also provided an overview the nature of Travel Manitoba research and described some key considerations.

- It was noted that Travel Manitoba is more reliant on sources such as Statistics Canada's International Travel Survey, given the outdated methods of media measurement that are currently available.
- Manitoba's international visitor spending is about twice as high as domestic and U.S. visitor spending.
- Short-haul visitation spending from the U.S. has been dropping over past decade, but long-haul U.S. visitor spending has been holding steady.
- Overseas data is drawn from too small a sample size to draw conclusions. Manitoba is based on sample sizes of $n < 100$ in European countries.

Questionnaire Assessment

Rick also elaborated upon one of the key objectives identified at the outset of the session discussion, expressing the desire to address the longstanding inability of Travel Manitoba to accurately understand the impacts of its marketing efforts. It was noted that this is particularly important given the unreliability of the international visitation data available through Statistics Canada.

Travel Manitoba is proposing that an on-line questionnaire be distributed annually to international marketers and others in the industry. Participants were subsequently presented with a draft questionnaire and asked whether this methodology would work for participants. Suggestions were also sought for how the methodology and questionnaire might be improved.

Participants were further provided with assurances that information collected by Travel Manitoba through the survey would only be shared in aggregate form.

Methodology

- There were no objections in principle to sharing visitor origin information with Travel Manitoba.
- To the extent that the methodology was regarded as problematic, festivals are generally unaware of the origin of their visitors. Specifically, Festival du Voyageur, stated that it recognized the existence of this visitor origin challenge and was currently grappling with the internal steps necessary to achieve this objective. While being described as “not insurmountable”, tracking visitors does present challenges.
- Several other organizations, including Assiniboine Park Zoo, stated that they too intended to implement practices which would allow them to track visitor origin. Some expressed the intent to have such processes in place within the next 3 to 5 years.
- There was some desire for the results derived from the collected data to be shared exclusively among those who participated in the survey. Travel Manitoba stated that it would not be able to provide guarantees of this nature given the nature of the organization as an arm of government and access to information legislation.
- There was a strong consensus among participants that generating current and accurate research would be helpful to all parties. In particular, it was noted that such information would be useful for the purposes of planning and focusing limited resources.
- To the extent that there were concerns about generating such research, one participant noted that the inevitably small survey sample might allow someone to “reverse engineer” the data and determine the identity of individual respondents.
- One participant suggested that Travel Manitoba develop a “contract” between itself and respondents outlining how the results of the survey will be used and who will be recipients of the findings.

Questionnaire

1) Which of the following categories best describes the nature of your business operations:

- Fixed roof accommodation
- Lodges/outfitters
- Travel trade
- Parks/campgrounds
- Transportation services
- Outdoor wilderness tours
- Year-round outdoor attraction (e.g. Zoo, zipline, etc.)
- Year-round cultural attraction (e.g. museum, gallery, etc.)
- It was suggested that there was an insufficient number of operational categories. Suggested inclusions included:
 - Seasonal
 - Events / performing arts
- Secondly, there were some questions as to whether the term “travel trade” was sufficiently well defined, with the suggestion that it be clarified or removed.

2) Thinking about 100% of your business, what percentage of your current business comes from each of the following markets?

Manitoba		%
Other Canada		%
US near markets		%
US long-haul markets		%
Europe		% (if yes, dropdown - which countries)
Asia		% (if yes, dropdown - which countries)
Other		% (if yes, dropdown - which countries)

- There were no concerns raised with respect to this question.

3) Please identify the regions or regions where are experiencing growth or decline.

	Strong growth	Moderate growth	Status quo	Moderate decline	Strong decline	Not applicable/not currently a market
Manitoba	<input type="radio"/>					
Other Canada	<input type="radio"/>					
US near markets	<input type="radio"/>					
US long-haul markets	<input type="radio"/>					
Europe	<input type="radio"/>					
Asia	<input type="radio"/>					
Other, specify _____	<input type="radio"/>					

- There was some objection to the scale being used to determine growth and decline, with one participant arguing that the scale was open to broad interpretation. It was suggested that percentages of growth or decline be used as a scale.

4) Please indicate the extent to which you agree with the following statements:

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
<i>My clientele is looking for new experiences they had not previously been seeking.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I am developing new experiences to meet client demand.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>At present, my market choices will remain the same</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I am considering other markets in addition to my current marketing mix</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I will definitely be adding new markets to my current marketing mix in the next 2 years</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I will be dropping markets from my marketing mix in the next 2 years</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- It was suggested that the final two items in this bank of statements might be elaborated on further by asking which markets will be added or dropped in the next two years.
- The comment above led to a more general discussion about the robustness of the questionnaire, with one participant indicating that a more detailed questionnaire would provide useful information. In response, Travel Manitoba indicated that they did not want to make the questionnaire overly demanding for respondents. The concern here is that respondent compliance might fall if the information gathering process were to become arduous.

5) *What is the gross income of your company or organization?*

Please round your dollar figure to the nearest \$100,000

- The question concerning income was negatively received by some, who felt it was too intrusive. Indeed, some participants failed to see how this question would provide information necessary for Travel Manitoba.
- It was argued that knowing the size of operators provides another layer of depth of understanding. One participant noted that including such information would also be useful in terms of strengthening the case to the provincial government that the tourism sector requires additional support.
- There was a general consensus among session participants that broad categories of income would be preferable to rounding to the nearest \$100,000.

2014/15 International Marketing Campaign Plans

Cathy Senecal and Dene Sinclair presented the Travel Manitoba 2014/15 campaign plans, indicating that overseas plans and partnerships with the CTC are pending input from the session.

- Dene started by indicating that various events have been planned for 2014.
- Dene provided her own perspective on the absence of actionable information and stated that she was looking to have better information through the survey on how many Manitoba trips are being purchased through out-of-province tour operators. Some operators are currently quite forthcoming with this type of information; others not at all.
- U.K. handling is being done through an agent; Germany through Marketing Services International – MSI.
- There are no major tour activities in the U.K., although Travel Manitoba is taking part in Canada Specialist Days and Canada Day events in Germany.
- The agent in the United Kingdom has French-speaking staff and Travel Manitoba is leveraging this ability to have them do additional work in France.
- There are no plans for consumer shows in the U.S..
- Cathy stated that the Dublin/London events happened in early 2014 and that she will host about four United Kingdom media this year. Furthermore she will be hosting one French journalist this year.
- The Go Media Marketplace will occur in August and will host 150 domestic and international media, as well as 150 partners, such as Travel Manitoba. There will be 23

pre and post trips in Canada, including several Manitoba trips. Travel Manitoba will be courting the media when they are in Winnipeg for two days.

- There is a heavy focus on fish/hunt this season with Cathy attending an event in Los Angeles or San Francisco. There will be a Toronto event happen in late September, with the possibility of a campaign around a sporting event – details are not yet certain.

Strategic Issues Discussion

Brigitte Sandron provided an introduction to the Strategic Issues considerations, noting:

- Travel Manitoba works with a \$4.5 million budget -- 38% Canada, 8% U.S, 3% Germany, 3% U.K., 42% All Markets (e.g., campaign assets, general activity – not dedicated to one market), with an additional 2% opportunity budget.
- Participants were once again reminded that the development of an industry-wide survey would provide a better pulse on outcomes from Travel Manitoba efforts, given the two-year lag in Statistics Canada data.

Participants were separated into four groups and asked to discuss four potential strategic directions Travel Manitoba could take with respect to the allocation of its resources.

1. Reduce investment in European markets, shift more resources to target long haul United States markets.
2. Eliminate investment in European markets, shift more resources to target long haul United States markets.
3. Reduce investment in European and/or United States markets, shift resources to new markets.
4. Maintain Status Quo investment in the United States, Germany, and the United Kingdom.

Group 1 Preference & Rationale

Preference: Option 4

- This group contended that Manitoba offers a distinct product, whether it be selling Winnipeg or Churchill.
- The primary consideration is that entering into a new market is very expensive. Travel Manitoba efforts have established a “solid” presence in Europe “so we can’t let it go”.
- If the United Kingdom is still growing, there might still be additional product that can be promoted to that market.

Group 2 Preference & Rational

Preference: Options 3 & 4

- Operator budgets are too small, consequently it is not possible to reduce the investment in Europe without diminishing Manitoba’s presence there.
- However, if Travel Manitoba were to slightly reduce its presence in Europe, perhaps it could use media as starting point for new markets such as Australia, Netherlands, France. This could be further followed up by enhanced travel trade efforts.

Group 3 Preference & Rationale

Preference: Options 1 & 3

- All the years that have been invested into the European market cannot be abandoned. Want to keep growing Germany; the United Kingdom offers room for growth; people are starting to come from California as well. Furthermore, Australia is trending toward the Top 10, and holds the promise of additional growth for Manitoba.
- There are opportunities for urban growth, particularly within the context of the CMHR.
- Outdoor product has been yielding good results. Long-haul U.S. is still very much an outdoor market. With the CMHR, there is the possibility of niche opportunities, such as the student market. Vertical markets are the new markets, not the geographical markets. Visitors are going for “come for a unique experience in Winnipeg”, not “come to Winnipeg because we’ve got all these lovely things”.

Group 4 Preference & Rationale

Preference: Options 3 & 4

- Receptive Tour Operators (RTOs), in our experience, operate pretty heavily in Europe. Travel Manitoba can probably reduce some European investment and re-allocate to the U.S., which is such a big market and still holds the most potential. Even Australia will perhaps pull one-fifth the numbers Manitoba pulls out of the U.S. market. What we pull out of the U.S. is a drop in the bucket of the whole market; and these other markets represent a drop in the bucket compared to what the U.S. can offer us.

- Travel Manitoba should consider piloting marketing efforts in one part of the United States. We should focus on a particular area as a test, with our preference leaning pretty heavily toward California because it is such a large market, with an active population who travels.

Strategic Direction Shortcomings

- To the extent that there were concerns about the approaches being recommended to Travel Manitoba, one participant wanted to know how it was possible to sustain a marketing campaign over an entire year. Travel Manitoba responded by noting that its efforts are concentrated around specific seasons.

“Off the Wall” Partnership Ideas

Participants were asked to share any “off the wall or guerrilla” marketing ideas that Manitoba could “own” and would target a geographic or niche market. Suggestions included:

- Sponsoring WiFi in subway stations whereby users must see an ad to access the WiFi. This approach is attractive because it has a high yield on return for the investment.
- Culinary tours. Winnipeg and Manitoba have fantastic restaurants and culinary influences thanks to the multiculturalism here. Industry could build a tour the same way as Ontario has winery tours. For example it would be possible to develop tours to sample indigenous food. Louisiana was cited as an example of an approach that might be modelled.
- Sponsorship of World Pride in Toronto, since we want to go after LGBT in Toronto this year. Students also represent a market with promise. There are different tactics that could be used for each one.
- 2017 is Canada’s 150th birthday, so there’s an overarching focus on youth travelers in Canada.
- The Canada Summer Games are being held in Manitoba in 2017 and provide another angle on the youth market.
- A Travel Manitoba campaign in California because of what was said earlier. Marketing our wilderness, polar bears and beluga whales to Californians.
- There also needs to be a campaign focused on Manitoba. It is embarrassing how few Manitobans come to Churchill. We have our own ambassadors here, but they don’t come. It’s mainly because they can go to Mexico for the same cost.
- The Winnipeg Jets. When they played in Phoenix, half the crowd yelled out True North. Make people wonder where the True North is. Paul Maurice is a resource for Winnipeg and he is a resource to promote this province.

- Getting Manitobans promoting Manitoba with an emphasis on family and friends. Between now and 2017, get a program together where people in Manitoba could win a trip to the north to highlight what Manitoba is and build a media campaign around it.
- Something like a “Mini-Churchill in Central Park” in New York? Something that could go viral on YouTube.
- Winnipeg is seeing growth in wellness organizations and spas. People around the world are looking for some kind of an escape. Show that we have the same or better facilities in Winnipeg – promote to international, higher-spender tourists.

Subsequent discussion also explored potential partnerships that might be developed in order to facilitate these marketing ideas.

- Do we do a Team Manitoba in California? Industry can use some of its own money and grow the pot of money together with Travel Manitoba so that we can have an impact.
- We should identify Manitobans living in the U.S. who can be ambassadors in their communities – prominent people.
- Industry partnering with universities to promote travel in Manitoba to international students.

A prioritizing exercise allowed participants to indicate their support for each of the suggested marketing ideas. Dots numbered 1, 2 and 3 were provided to participants with 1 indicating the highest priority. Support for each of the marketing options are detailed in the following table.

	Priority Dot Placement		
	“First”	“Second”	“Third”
Jets “True North” campaign	6	6	6
Team Manitoba – Travel Manitoba with industry partners	3	4	3
2017 youth traveler – Canada Summer Games	3	4	2
Culinary tours	4	2	--
Sponsoring wifi	1	--	4
California wilderness / north campaign	1	1	1
Manitobans family and friend campaign	--	1	3
Mini-Churchill (e.g. in NYC)	2	1	--
Manitobans in US to become ambassador	--	1	--
Wellness industry	--	--	1
Manitobans promoting Manitoba – recruit influencers	--	--	--
Industry/university partnership (already being done to some extent)	--	--	--
Target market LBGT sponsored event	--	--	--

Travel Manitoba Marketing Assessment

Participants took a retrospective look at the marketing performance of Travel Manitoba in meeting the needs of the international travel trade industry.

Strengths	Weaknesses
<ul style="list-style-type: none"> • The video marketing campaign (Canada’s Heart Beats) was outstanding • That they took a step back, took a look and reorganized in the public view -- that was good. • Excellent campaign in Canada and down into the United States – but expand it and get it out there. The commercials are striking; would love to see them on TV stations all over the U.S. • I love, love, love the ads – but they’re too short. • Partnerships with Winnipeg Free Press and Air Canada to promote offerings. (In-flight ad campaign mentioned earlier in day.) • More co-branding would be better – e.g., TM/Air Canada tags; full-page ad in Free Press was excellent. • Spending with partners – Media tour program and others. 	<ul style="list-style-type: none"> • We want to attach corporate logos to Canada’s Heart Beats • The budget: Maintain what you’ve got now and don’t look at expanding until you have new money to do it. Government needs to put more money into tourism and think more about tourism. • Timeliness of reporting: After trade shows, getting the information for trade shows or events – to facilitate follow-up. There’s been no consistency: we’ll get reports two weeks later, sometimes a month later. Should be immediate – when the iron’s hot, strike! • Restore support for product development. The challenge for developing niche markets is that we need to be able to support our suppliers. (it was noted Michelle Wallace at the Tourism Secretariat would be contact person. Colin elaborated that the Travel Manitoba Board decided it should not be in the product development business.)

Unfinished Business / Wrap-up

Participants were asked to look ahead to next year's summit and identify specific issue areas or topics that need to be addressed more fully.

- “Whatever initiatives we undertake, we should have clear objectives.”
- It was suggested that there should be quantifiable metrics so that we are able to measure conversions by knowing how many people are submitting inquiries. The importance of support for the proposed industry survey was noted as a key means by which to further this objective.
- There was also the request for a better understanding of how other jurisdictions are measuring visitation. It was noted, however, that the problem is not unique to Manitoba and that all jurisdictions struggle with measuring results.

Appendices:

Travel Manitoba International Travel Trade Facilitated Session

Facilitator's Guide May 15, 2014 Fairmont Winnipeg, Wellington ballroom

Probe Gen. office: 926-6565

Lloyd cellular: 291-0295

9:30 AM

Continental breakfast (30 minutes)

10 AM

Introductions (10 minutes)

Agenda at a Setting (3 minutes)

Lloyd introduces today's objectives.

- (Refer to slide) Explanation of objectives:
 - ✓ To present the results and receive feedback on the 2013/14 International Marketing initiatives.
 - ✓ To improve the collective understanding of who Manitoba's existing international customers are.
 - ✓ To seek input into planning the 2015 International Marketing campaign.

(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.

Warm-up Exercise (7 minutes)

- I would like to provide everyone with 15 seconds to stand up to tell us your name and the nature of your business or organization.

10:10 AM

Travel Manitoba Overview (15 minutes)

Lloyd introduces Colin Ferguson who presents a high level Travel Manitoba overview and update.

- Key successes since the last summit
- Benefits of Brand launch for International Marketing.

10:25 AM**Year in Review (45 minutes)**

Cathy Senecal and Dene Sinclair present the Year in Review.

- Does anyone have any questions?
- Considering everything that was covered, what was the most useful information? Why is that?
- Do you have any advice going forward?

11:10 AM**Measuring Success (50 minutes)**

Rick Gaunt and Doug Evans present indicators of success (20 minutes)

- Does anyone have any questions?
- Considering everything that was covered, what was the most useful information? Why is that?

Questionnaire Assessment (30 minutes)

- The first objective that we identified at the outset this morning is intended to address a longstanding inability of TM to accurately understand the impacts of its marketing efforts.
 - Statistics Canada international visitation data is woefully inadequate and there is nothing to indicate that it will get better.
 - Additionally, StatsCan data is reported three to five years after the fact and doesn't allow TM the opportunity to react in a timely manner.
 - The inclusion of the objective to understand who international customers are is building upon efforts of previous summits during which participants expressed a willingness to share data concerning visitation.
- Today we are going to give some thought to a process that would allow businesses and other industry organizations to share information that is vital to TM. This process is undertaken with four things in mind.
 - Industry is the best source of information concerning international visitation.
 - It would be unreasonable to ask for and subsequently manage information in a manner that would harm the interests of the organizations providing the information.
 - It should not be a burden for the organization to provide the information.
 - The results will only be presented in aggregate form and your individual data will never be disclosed.
- Travel Manitoba is proposing that an on-line questionnaire to be distributed annually to yourselves and others in the industry. We are going to take a look at the draft questionnaire and then discuss whether this questionnaire and methodology are going to work and how they might be improved.

Display/distribute questionnaire & Review content.

- How difficult will it be to compile this information?
- Are there any obstacles to sharing this information in principle?
- Are there any specific questions that are particularly problematic? Why?
- What are the potential benefits of to you and your organizations by having TM compile this information?
- Are there any negative consequences to you or your organization from having TM compile this information?
- How can TM increase the value of the survey to you?
- Should results only be shared with participating organizations? Why/why not?

Noon -- Lunch (45 minutes for lunch break)

12:45 PM

2014/15 International Marketing Campaign Plans (15 minutes)

Cathy Senecal and Dene Sinclair present 2014/15 campaign plans. The presentation will indicate that oversees plans and partnerships with the CTC are pending input from the session.

- Does anyone have any questions?
- Considering everything that was covered, what was the most useful information? Why is that?
- Do you have any advice going forward?

1:00 PM

1:00 PM

Strategic Issues Discussion (45 minutes)

Brigitte presents introduction to Strategic considerations.

- We're going to have you remain at your table and break into groups to discuss four potential strategic directions Travel Manitoba could take with respect to the allocation of its resources.

(Refer to slide)

1. Reduce investment in European markets, shift more resources to target long haul United States markets
 2. Eliminate investment in European markets, shift more resources to target long haul United States markets
 3. Reduce investment in European and/or United States markets, shift resources to new markets.
 4. Maintain Status Quo investment in the United States, Germany, and the United Kingdom.
- You are going to have 20 minutes to discuss this issue among yourselves before we have a more general discussion as a larger group. You will want to elect a spokesperson for a table who will be able to present your case.
 - Things that you may want to ask yourself during our discussion might include:
 - Which of these options will be best for my own business objectives?
 - Which of these options will be best for Manitoba's International markets as a whole?
 - Which of these options represents the greatest potential for the growth of international travelers to Manitoba?

Group discussion occurs

- To start off I just want to go around the room and asked each of the groups which option they identified as their preferred approach?

Tally at easel

- (For any groups that provided a dissenting approach) What is the best case that you can make for this approach over the other options selected by other groups?
- (For any groups that provided a dissenting approach) Do you perceive any shortcomings to the approach that you have selected?
- (If there is a high degree of consensus) What positive outcomes were anticipated as a result of taking this approach?
- (If there is a high degree of consensus) Are there any negative consequences that we can foresee as a consequence of this approach?

1:45PM

1:45PM**“Off the Wall” Partnership Ideas (30 minutes)**

- (At easel) Here is your chance to really get imaginative. I would like you to share any off the wall or guerrilla marketing ideas that Manitoba could "own". And by "own" I mean something that would target a geographic or niche market. Keeping in mind at this point that nothing is too crazy, what do you have?

Build lists

- What would be the main benefit of this unique marketing idea?
- Who do foresee as being in the driver's seat in making this happen?
- Does anyone have any suggestions or concerns concerning this marketing approach?

Prioritize lists

- (As required) I'm going to provide you each with dots numbered 1 to 3. I'm watching from a pure and place the number 1 on your preferred marketing idea, Wilson 2 going on your second preference and the 3 appearing on your third choice?

2:15 PM**Travel Manitoba Assessment (30 minutes)**

- How well it is Travel Manitoba doing in serving the marketing needs of the international travel trade industry? Why do you say that?
- Are there any opportunities that Travel Manitoba is missing? Why do you say that?
- (At easel) I just would take a few minutes and build a list of the strengths and weaknesses of Travel Manitoba in meeting international marketing objectives. Where should we start...

Build lists

- If Travel Manitoba were to make a change to any one thing that it does, what would you like to see done differently? Is there anything else?

2:45 PM**Unfinished Business (5 minutes)**

- Is there any topic during the course of the day that was not sufficiently well discussed?
- Our discussion here today has been quite narrowly focused. Does anyone here have any additional issues you were hoping to have covered today that we could briefly discuss now?
- How can this issue best be addressed?

Wrap-up (5 minutes)

- (At easel) Looking ahead to next year's summit, are there any specific issue areas or topics that you feel need to be addressed more fully in a session such as this one? Which ones?

2:55 PM**Thank and Dismiss Participants**