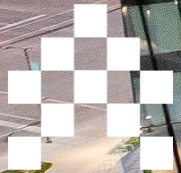


2023

ANNUAL REPORT



Discover ᑭᓄᑦ
saskatoon

discoversaskatoon.com | 800.567.2444

WE ARE ALL TREATY PEOPLE

Land Acknowledgement

We acknowledge that we are on Treaty 6 Territory and the Homeland of the Métis people. We reaffirm our relations which we are bound to by our ancestors through Treaty, to steward and seek mutual benefit on this land for as long as the grass grows, the sun shines, and the river flows. We pay our respect to the First Nation and Métis ancestors of this place and honour Elders and Survivors as we bring awareness to Indian Residential and Day Schools, The Sixties Scoop, Missing and Murdered Indigenous Women, Girls, and Two-Spirited. To acknowledge this territory and its keepers on their traditional terms is to act in reciprocity so that truth may be understood, and reconciliation is made possible.



LETTER FROM THE CHAIR & THE CEO

The circumstances our sector has been relentlessly facing may have seemed impossible through the past year of fluctuation and uncertainty however, staying true to the prairie resilience that our destination is so uniquely known for, Discover Saskatoon's team and our partners have demonstrated excellence in delivering exceptional results.

Collaboration throughout and beyond the tourism sector was paramount to the success that is reflected in this Annual Report for the calendar and fiscal year of 2022. We write this, in a moment in 2023, that the visitor economy is showing signs of substantial growth and recovery despite the continued challenges for our destination.

While some business segments returned without haste, we recognized the slower return of business events and corporate travel to Saskatoon. Our focus in maintaining connection to rebuild and establish a strong sales pipeline has not only driven near term results but created a foundation of business for the destination. Rebooking cancelled business was accompanied by focused and intense lead generation and pipeline development across key markets and segments in Canada.

Inspiring visitation from around the world was enhanced by the launch of the new Discover Saskatoon brand and the newly established Partnership with the Saskatoon Tribal Council. This new identity was designed to unify, differentiate, and inspire. More than two years of community conversations helped to shape this transformation; about who we are and how to best celebrate our people, our hosting excellence, the land and the destination we steward.

It is with great pride that we launched this partnership on the same day that we signed our partnership agreement in ceremony with the Saskatoon Tribal Council. Our brand and this partnership is an invitation to discover our future of kinship and connection. Together, we inspire visitation and drive economic development by creating meaningful connections through business, sport, and leisure travel. The stories of this city deserve to be told and we acknowledge the responsibility that comes with

intentionally, inclusively, and authentically telling them. We are proud to affirm our accountability and commitment to the United Nations Declaration on the Rights of Indigenous Peoples and the Truth and Reconciliation Commission's Calls to Action. Our accountabilities reflect in both our brands and our actions.

The confirmation of a new Service Agreement with the Saskatoon Destination Marketing Hotels Inc. affirmed the gold standard relationship with our destination marketing partners that is the envy of many destinations. Working closely with the newly established SDMH Inc. Board of Directors, 2022 brought collaboration, strategic planning and communication at exactly the right time when it became clear that families were returning to travel, sporting events were returning to regular frequencies and business event clients were ready again with urgent opportunity.

Marketing initiatives, including the VISA75 Campaign, Winter Fun YXE and Summer Campaigns, also formed vital new foundations for communicating with travellers and residents that not only supported our recovery but are long-term foundations for driving highly strategic content on well-performing platforms. Efforts were thoughtfully aligned with member events like the "Arctic A Man Under The Ice" and the return of the Saskatchewan Rush. We continued to prioritize connections to and across our community through dedicated member e-newsletters and member retention strategies.

Through these key strategic areas of focus, Discover Saskatoon allocated its resources prudently while consistently generating additional revenue to ensure we are in the best position to activate sales and marketing at times that will have the greatest impact. As a result, the organization is in a stable financial position, supported by a strong Board, external advisory committees, and an incredible team of staff. We are grateful to the community and our stakeholders for the continued support of Discover Saskatoon and, most importantly, for the resilience, resolve and collaboration that is seeing us through to this new period of growth, regeneration, sustainability and prosperity.



Stephanie Clovechok
CEO, Discover Saskatoon

A handwritten signature in blue ink that reads "S. Clovechok".



Patty Schweighardt
Board Chair

A handwritten signature in blue ink that reads "Patty Schweighardt".



CONTENTS

05 INTRODUCTION

- 5 Discover Saskatoon Team
- 6 2022-2023 Discover Saskatoon Board of Directors
- 7 The Evolution of Discover Saskatoon's Role
- 8 Tourism Trends in 2022
- 10 Occupancy Rates - Saskatoon

11 2022 STRATEGIES TO SECURE A STRONG FUTURE

- 12 Strategic Pillars
- 13 Destination Leadership
- 14 Saskatoon Destination Marketing Hotels Inc.
- 15 Strengthening Community Involvement
- 16 Secured Tourism Relief Funding
- 17 Partnership Agreement with: Saskatoon Tribal Council & 7 Nations
- 18 2023 – 2025 Destination Strategy Completed

- 20 The Brand: Discover Saskatoon
- 21 Digital Engagement
- 27 Destination Innovation

29 LOOKING FORWARD

- 30 Key Markets & Forecasted Trends in 2023

DISCOVER SASKATOON TEAM



Stephanie Clovehok
Chief Executive
Officer



Marcy Atchison
Executive Assistant
Office Coordinator



Kaurie May
Director,
Finance & Operations



Sarah Berger
Director, Marketing &
Communications



David Larson
Business
Development
Manager



Angela Worobec
Manager,
Communications &
Brand



Jenny Dao
Business
Development
Manager Ottawa
Contract



Geeta Singh
Manager,
Digital Marketing



Shannon Davies
Business
Development
Specialist



Danielle Byl
Membership & Visitor
Experience Manager



Anahi Soria
Business Development
Specialist, Travel Trade &
National



Darby Sutherland
Manager, Earned
Media



Tiffany Dodds Little
Business
Development
Specialist, Sport &
Major Events



Christine Booth
Media & Digital
Content Specialist



Bailie Knowles
Marketing &
Communications
Coordinator



Chelsea (McLean) Pitre
Business Development
Specialist, International



Shirley Gilles
Accounting Coordinator
Contract

2022 BOARD OF DIRECTORS



Patty Schweighardt
Chair, Governance
Committee
Delta Hotels by
Marriott Saskatoon



**Councillor
Bev Dubois**
City Councillor
Ward 9



**Councillor
Cynthia Block**
City Councillor
Ward 6



Dan Kemppainen
Chair, Audit
Committee
PrairieLand Park



Fred Hrehirchuk
Towneplace Suites
by Marriott



CJ Dushinski
Chair, HR Committee
Airport Authority



Andrea LaFond
Meewasin Valley
Authority



Christine Ruys
Member, Saskatoon Sport
& Major Event Advisory
Committee University of
Saskatchewan



Hanif Hemani
Express Employment
Professionals



Tammy Sweeny
Chair, Business
Events Advisory
Panel TCU Place



Darlene Brander
Chair, Wanuskewin

The Evolution of Discover Saskatoon's Role

The focus of Destination Marketing Organizations (DMOs), like Discover Saskatoon, is evolving to fulfill a new role in communities across the world. Traditionally, a DMO's main role was to develop clever taglines and churn out promotional campaigns. Yet with the abundance of online information available to travellers, the research and booking process has changed dramatically, causing a shift in the roles and responsibilities of your destination representative.

A new title has emerged to better define the scope of work the team at Discover Saskatoon does for you – a Destination Management and Marketing Organization (DMMO). While destination marketing helps in positioning our destination as an attractive city to visit and invest in, the added focus on destination management means to ensure its sustainability over a prolonged period of time.

It's not just about bringing people to Saskatoon, it's about keeping our community healthy and whole at the heart of what we do, elevating the visitor experience once travellers arrive and communicating with them after they leave. In addition to traditional marketing channels, Discover Saskatoon has, in fact, been ahead of this global shift to DMMO, creating compelling invitations in core global markets while working closely with our community and strategic partners to drive quality of life and economic prosperity here at home.



Tourism Trends in 2022

Taking stock of tourism's biggest challenges



Rising Rates: High consumer demand for travel as restrictions are lifted, coupled with reduced supply and capacity, as well as workforce-related constraints, ever-increasing inflation, are all contributing to rising travel costs.



Getting Here: Reduced availability to transportation—both air and ground—is creating barriers to connect travellers with a destination. In Saskatoon, our collaborative efforts with the Saskatoon Airport Authority and the Province will be focused on improving air access. Inter-provincial partnerships will enable short term access from other markets.



Finding Talent: A diminished workforce capacity and lack of training is a challenge to industry recovery. Retraining and upskilling existing workers, while attracting new and previous members, is critical.



Tourism Trends in 2022

Taking stock of tourism's biggest challenges

continued



Business Travel & Events: A Slow Recovery: Leisure travel is leading the way to short-term recovery, while corporate travel faces a slower return. Deloitte's corporate travel survey, *How the pandemic is reshaping corporate travel (2021)*, forecasts that business travel will likely recover only to around 80% of pre-pandemic levels by 2024. A focused effort on showcasing Saskatoon's Sectors of Strength in partnership with Trade & Export partners can improve this recovery time for Saskatoon.

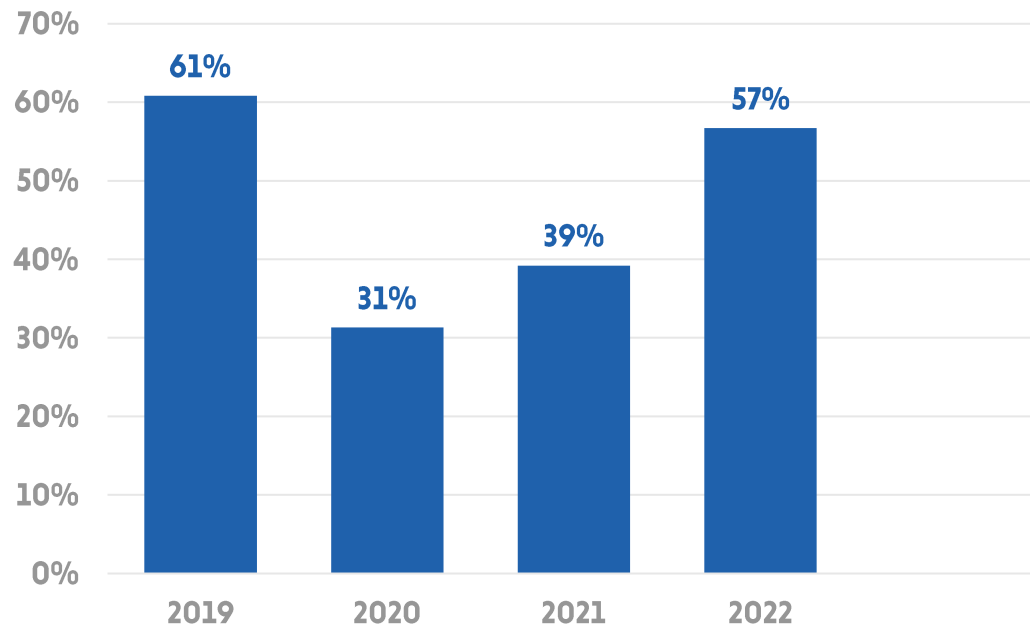


Funding for DMOs: Most Destination Organizations rely on funding through tourism related levies. We have relied more on non-traditional sources of funding and building partnerships with community organizations to ensure the opportunity for Saskatoon to remain relevant and competitive in the world. Our opportunity is to stabilize and grow revenues now and into the future.



Occupancy Rate % 2019 - 2022

FOUR-YEAR HOTEL OCCUPANCY LEVELS



Year-over-year occupancy rate recovery continues stronger but remains below pre-pandemic levels. 2022 average occupancy rate reached 56.7%, 4.1 PP lower than the same period in 2019 but 17.5 PP higher than in 2021.

2022 could be considered the first normalized year for the Saskatchewan economy; however, various factors, including a delay in the lifting of COVID restrictions in other provinces and countries, had an impact on travel to and from Saskatchewan, further impacting our hospitality sectors from seeing a 100% regular year.

DISCOVER

Saskatoon's 2022
Strategies To Secure A
Strong Future



Strategic Pillars in 2022

These Strategic Pillars are the foundation that guides us as we craft our goals and objectives for the coming year and beyond. They are based on our commitment to building a thriving and sustainable visitor economy.

Enhance & Evolve the Visitor Experience

Our focused efforts on experience innovation and community engagement continue to characterize us as an essential Canadian travel destination.



Live & Lead with our Brand

Our sales and marketing initiatives connect emotionally to consumers and clients alike, driving demand for Saskatoon experiences and value for tourism product in Saskatoon.



Community Wellbeing

Our community is at the heart of everything we do. Our pillars align with the long term viability of economic prosperity, our people and the planet.



Develop a Sustainable Industry

Our targeted advocacy and promotion of equitable economic development ensures value to our members and stakeholders and enhances the quality of life and place for the Saskatoon community.

Operate a Culturally Sound & Performance-based Organization

We believe that by being a value-based organization our performance will thrive. Our commitment to coaching, mentorship, communication, professional development and succession planning ensure the right people are in the right places to serve our stakeholders.





Destination Leadership

Eleven Major Initiatives in 2022

- 1** Partnership with Saskatoon Tribal Council Signed
- 2** 3 Year Destination Marketing Partnership Signed with SDMH
- 3** 3 Year Destination Strategy Developed & Completed
- 4** Tourism Relief Fund Secured \$489,000
- 5** Organizational Improvement Initiatives Completed
- 6** 2023 Management & Marketing Plan Completed
- 7** External Advisory Committees Established & Launched
- 8** City of Saskatoon Fee for Service Agreement Reviewed
- 9** SDMH Incorporated & Board Partnership Launched
- 10** 24 SDMH Hotel Contracts Signed for 2023-2025
- 11** SDMH Incorporated & Board Partnership Launched

Saskatoon Destination Marketing Hotels Inc.

Partnership Established

- Incorporation Completed
- Brand & Website Launched
- Monthly Partner Hotel Meetings Launched
- SDMH Board Meetings Launched
- SDMH Board Collaboration in Annual Business Plan Launched

SASKATOON DESTINATION MARKETING HOTELS





Strengthening Community Involvement

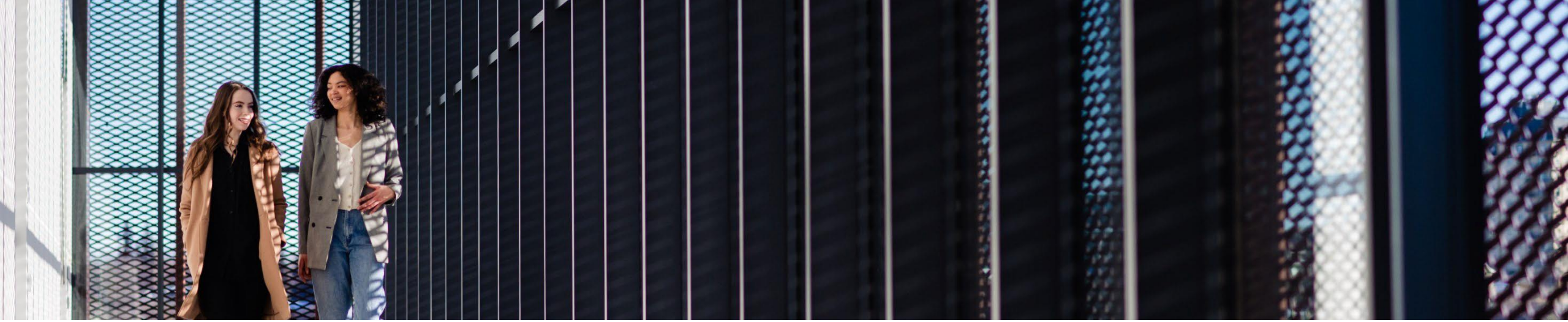
Two New External Advisory Committees

Business Event Advisory Panel (BEAP)

The Business Event Advisory Panel (BEAP) provides strategic advice to Discover Saskatoon in the pursuit of acquiring business events in Saskatoon. This panel works to identify and evaluate opportunities for major business events for the city of Saskatoon by supporting Discover Saskatoon with advocacy, ambassadorship, and communications relating to business events.

Saskatoon Sport & Major Events Advisory Committee (SSME)

The Saskatoon Sport & Major Events Advisory Committee (SSME) operates as an advisory committee as it relates to the development and procurement of sport and major events in Saskatoon. This group provides advice and input regarding strategic plans, and development of communications to market and develop sport and major event resources.



Dedication to Revenue Generation

The Destination Market Program in Saskatoon has evolved through times of high occupancy into times of great strain, and now requires either full collaboration by all hotels in Saskatoon or the pursuit of a different model. Discover Saskatoon has successfully sourced approximately \$986,500 dollars' worth of additional funding to support destination development, business development, and marketing efforts over the past year and will continue this pursuit.

- Federal Tourism Relief Fund
- Heritage Canada (2022-23)
- Heritage Canada (2022 small items)
- Saskatchewan
- City of Saskatoon Civic Hospitality Fund Reserve for Bid Incentives
- Emergency CEWS/CERS

The stability of our destination's visitor economy requires a commitment by current stakeholders and our team if Saskatoon is going to stay relevant and competitive in years to come.



Partnership Agreement Signed With Saskatoon Tribal Council & Seven Member Nations

Tourism has a significant role to play in Canada's journey to Truth and Reconciliation.

The signing of this partnership which was accompanied by a pipe ceremony will ensure Discover Saskatoon's commitment to enabling Indigenous people's access to the visitor economy. Our partnership will also enable the inclusion of territorial protocol for all business events, cultural events and sporting events hosted in this territory.

To honour and acknowledge Indigenous people as the first hosts of this land is integral to the forming of our partnerships. The land does not need us to acknowledge that it was stolen. The land and our future generations need us to return the Traditional Keepers and Stewards to their rightful places and live in the Spirit of the Treaty's that we are bound to by our ancestors.

Indigenous people have been purposefully distanced from economic opportunity and our authenticity as a destination requires the voices and stories of this land to come forward through all our work. These stories are not ours. As an organization, we are accountable to both the United Nations Declaration on the Rights of Indigenous Peoples, the Truth and Reconciliation Commission's 94 Calls to Action and the Calls to Justice - MMIWG.

2023 – 2025 Destination Strategy Completed

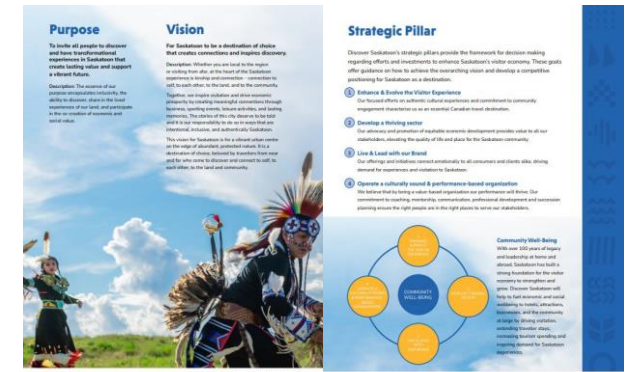
Discover Saskatoon's role is to always be looking at the bigger picture, leading the way to promote and manage our community as a four-season destination while developing experiences, incubating events, and strengthening partnerships that position Saskatoon as a destination of choice. This makes Saskatoon an incredible place to live, work, learn, and play. Our role in building and nurturing an engaged tourism sector is so important, now more than ever.

Our focus is on collaboration and contributing to a viable and thriving economic model for Saskatoon's visitor economy and doing so with sustainability and purpose.

We are on a path to a resilient future, where new ways of collaborating will be key to our success in Saskatoon, a community flourishing because of the tourism ecosystem.



Discover Saskatoon 2023 Strategic Plan





The Destination Strategy

Saskatoon is a place like no other, a land of abundance and opportunity where residents and an estimated 2.7 million visitors per year alike can experience life connected. Wherever you hail from, you'll feel the significance of this land. Not only does the visitor economy create jobs and generate revenue, but it also drives awareness of this amazing city around the world, in turn, contributing to our city's local economic vibrancy, future prosperity, and quality of life.

This plan provides a shared direction of what we want to accomplish and how we will leave a positive legacy in the work we do. We know where we are going, how we're going to get there and what we want to accomplish along the way.

Doing business must contribute to positive outcomes from a broader perspective:



For our businesses: through competitiveness and profits that are contributing to overall social wellbeing.



For our planet: regenerating natural capital and avoiding all forms of waste.



For our people: a sector of satisfied employees inspired by our long-term vision, and a healthy local community where equality and diversity are thriving.

The Brand

Vision

For Saskatoon to be a destination of choice that creates connections and inspires discovery

Purpose

To invite all people to discover and have transformational experiences in Saskatoon that create lasting value and support a vibrant future.

Our community is at the heart of everything we do. Our mandate remains the same: we serve our community and our partners by telling the stories of Saskatoon and promoting our city on national and global stages. While we are a representation of the voice that lives here, we do not own that voice.

We are constantly unearthing the **storytellers** and **ambassadors** of our destination.

[VIEW BRAND SITE & TOOLKIT](#)

The future of tourism is kinship and connection

Whether you are local to the region or visiting from afar, at the heart of the Saskatoon experience is kinship and connection—connection to self, to each other, to the land and to the community.



Our Iconic Story

Our logo was purposefully created to reflect the spirit of Treaty 6. The icon, wordmark and Cree syllabics honour our commitment to restoration, regeneration and reconciliation.

Created by local artist Christine Marie, a woman of Métis and Filipino roots, our new icon is a visual reminder that we are all treaty people, crossing bridges together in the land of the living skies.

THE SUN

A nod to the land of the living skies, it pays respect to the land and is reflective of the Treaties.

THE BRIDGE

An invitation to cross the various bridges in Saskatoon to discover all it offers! Discover this place.

THE WATER & HANDSHAKE

Representing unity with one another and is a sign of respect for the presence of others. This reflects a foundation of kinship, unity with the land and one another.



Website views

Total Unique Visits 2022: **535,776**

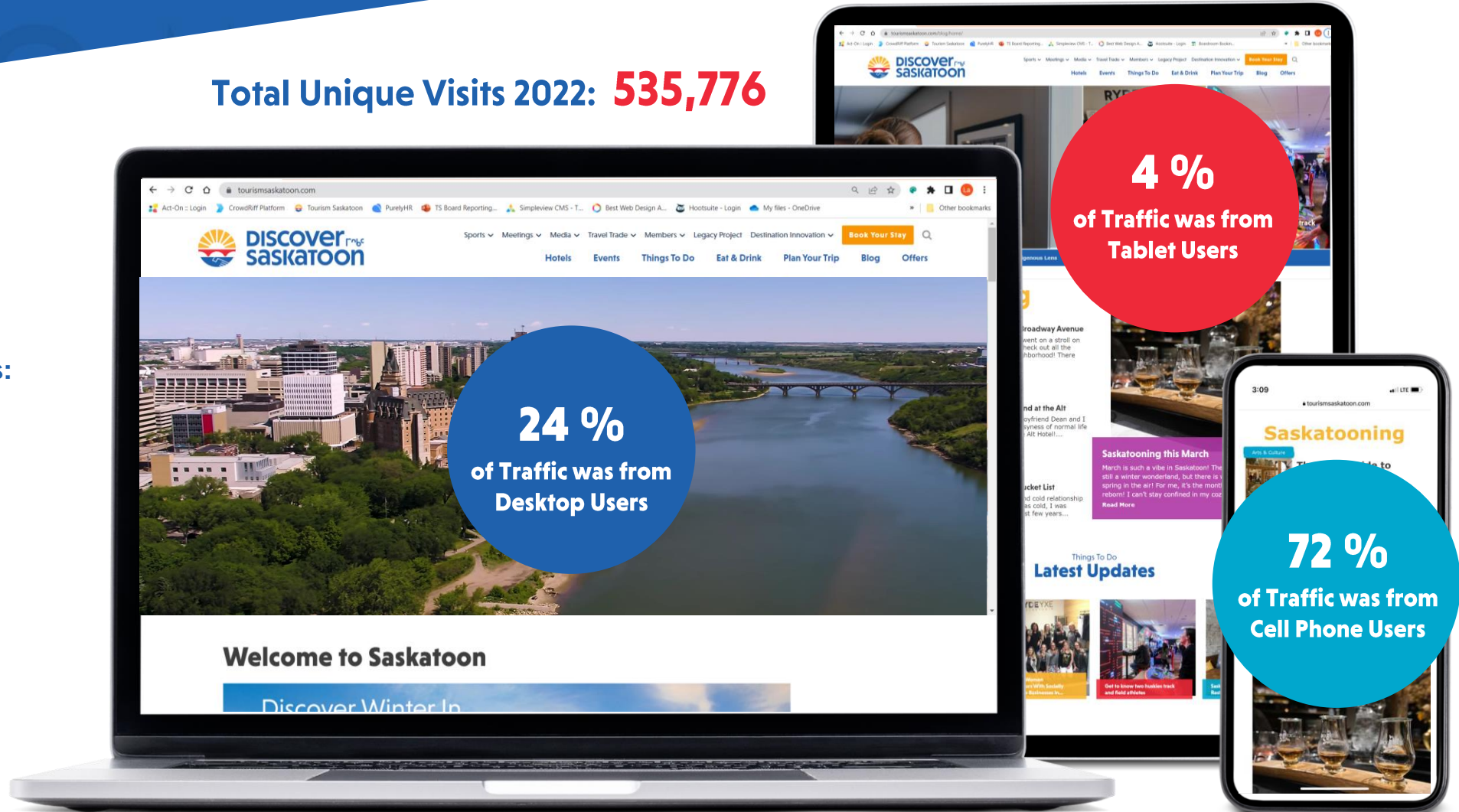
Top 5 User locations:

1. Canada
2. United States
3. India
4. United Kingdom
5. Australia

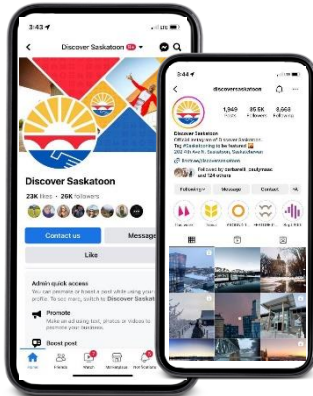
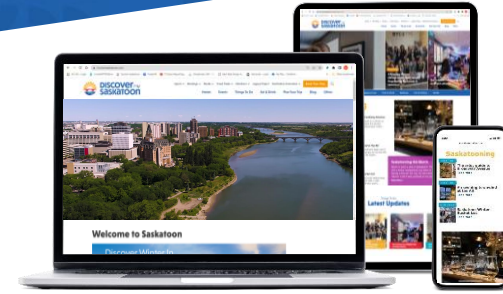
24 %
of Traffic was from
Desktop Users

4 %
of Traffic was from
Tablet Users

72 %
of Traffic was from
Cell Phone Users



Digital Engagement & Campaign Success



Global Marketing Website visitors by location

Outside of Canada

47,121

vs. 35,145 - 34% increase

Canadian Provinces

488,655

vs. 375,087 - 30% increase

Within Saskatchewan

297,636

vs. 272,372 - 9% increase

66,445 Website Referrals to Members & Hotel Partners

Social Media Engagements with Discover Saskatoon content

Facebook reach

1,338,543

vs. 1,029,359 - 30% increase



Instagram reach

414,021

vs. 286,103 - 45% increase



Twitter Impressions

887,875

vs. 708,300 - 25% increase



LinkedIn Impressions

114,201





Earned Media



Attended 3

Key media Marketplaces



65

Face-to-Face meetings
with Key Media Partners



Hosted 9

Key Media in Saskatoon to
Encourage Inclusion in Key
Target Publications



23

Earned Media Publications

Top Media Placements: Forbes, Vacay.ca, Travel & Leisure, Adventure Travel News.



Membership Services



320

Total Members
-13% vs 2021



\$49,457

Membership Income
+8% vs 2021



41

Member Email
Communications Sent



50%

Open Rate: Member
Email Communications
Benchmark is 28%



LEGACY

PROJECT

The Legacy Project brings meaningful local, national, and international events to Saskatoon! Its members, are Saskatoon community leaders and experts, who champion bringing events to Saskatoon by lending their support and expertise throughout the process of securing an event.



Launched Legacy Project
Website & Brand



Hosted Launch Event
for Legacy Project

20

Legacy Builders Awarded
with Builder Awards

3

prospective
Legacy Builders



Travel Trade



Hosted 56

Face-to-Face Meetings with
Tour Operators and RTOs



Hosted 16

Key Tour Operators
on FAMs



Trained 68

Reservation Agents at Key
Tour Operators



Trained 129

Travel Agents with Clear CTAs



Destination Innovation



3

Participants in the
Experience Development
Program



2

New Experiences
Developed and
Launched



Phase One Completed

Partnership & Development
Project with the Saskatoon
Tribal Council

DESTINATION INNOVATION 2021 & 2022 EXPERIENCE DEVELOPMENT & EXPORT READINESS

Meewasin Valley Authority:
Naughty By Nature, Grazing
Dinner & Winter Sips and Skating



Living Sky Adventures:
Balance on the Water



Station Arts:
Garden Alchemy



The Local Kitchen:
Rooted Cooking Class
and Neighborhood Tour



Stumbletown:
Distillation a Grain to
Glass Experience



**Back 2 Nature: Stand
Up Paddleboard &
Sauna Experience**



Black Fox Farm & Distillery:
Winter Whiskey &
Snowshoe Experience



Farm One Forty:
Guided Farm Tours & On
Farm Culinary Experience



Delta Bessborough:
Dining in the Domes
Experience



Champetre Country:
Full Day and Half Day
Experiences



Picaro Restaurant:
Family Style Taco
Making Experience



Wanuskewin Heritage Park:
Winter Camp Experience
& Guided Tour



LOOKING FORWARD



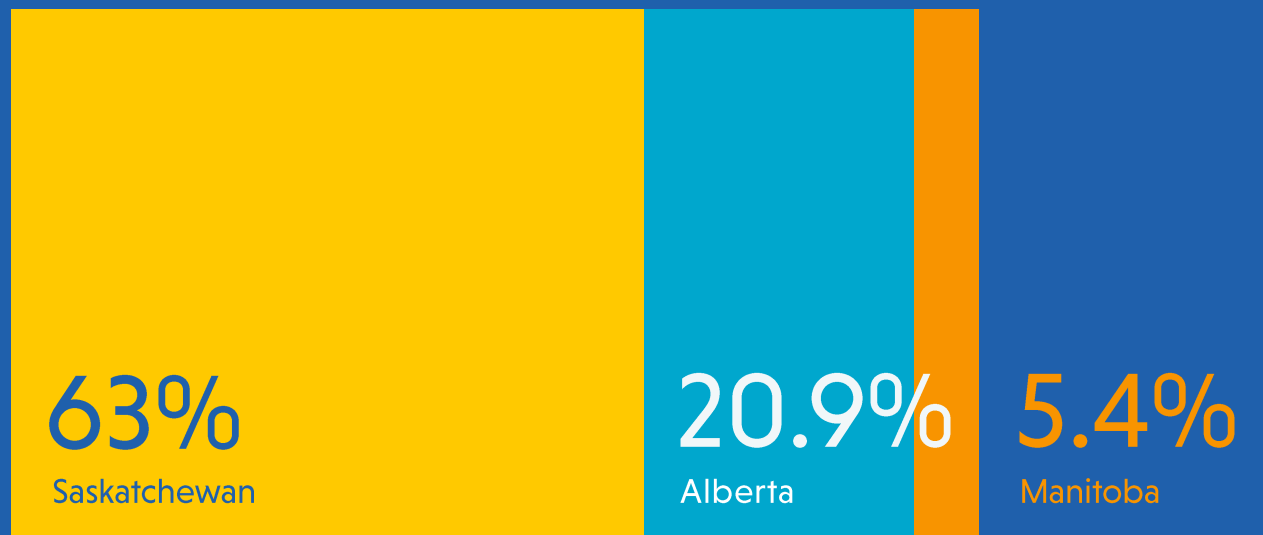
Key Markets and Forecasted Trends in 2023

Visitor trends in 2023

Inviting our Neighbours

Domestic tourism will continue to drive sector recovery with industry experts projecting a return to 2019 levels by 2025. Uncertainties surrounding safety and security, geopolitical risks and inflationary pressures has enticed travellers to exhibit preference for domestic destinations, continuing the substitution of outbound to domestic trend observed amid the pandemic.

Key domestic markets for Saskatoon are:



% of Canadian overnight visits to Saskatoon

Manitoba Visitors spend **15% more** than Alberta Visitors

Key Markets and Forecasted Trends in 2023

International Markets

Returning to Canada

Full recovery of international travel to Canada is expected by 2025 from key markets such as the United States, United Kingdom, Germany and Japan.

Tourism spending in Canada from US visitors is expected to accelerate faster than most in 2022 and fully recover to the 2019 benchmark by 2025, providing Saskatoon with an opportunity to broaden the intent to travel from US markets beyond hunting and fishing.

European Recovery

Spending from overnight visitors is expected to be moderate in 2023 and 2024 as a result of economic fallouts from the Ukraine-Russia conflict. Spending is expected to return to its long-term trend by 2025, surpassing the 2019 benchmark. Being the most impacted by the conflict, commodity cost increases, particularly oil and gas, are expected to be particularly acute in Europe, slowing economic growth, slowing arrivals into 2023 and delaying the recovery baseline by one year to 2025. Close ties to Canada in the UK may temper this tendency.

Asia-Pacific Recovery

The Japan Market may be moderately impacted by the Ukraine-Russia conflict. The Japanese traveller remains largely interested in the experiences available in Saskatoon and as business travellers are returning on trade missions which could return both leisure and business travel in higher volumes than prior to the pandemic.

✉ info@discoversaskatoon.com

☎ 306.242.1206

🌐 DiscoverSaskatoon.com

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 /Saskatooning



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saskatoon

