

NORTHERN MANITOBA

TOURISM STRATEGY



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INTRODUCTION

Northern Manitoba is defined, for tourism purposes, to be the region of Manitoba north of the 53rd parallel. It is a vast territory comprising almost 60% of the land area of Manitoba.

The natural assets of the region includes thousands of lakes, vast boreal forest, major tracts of Laurentian Shield, and an Arctic region bordering the Hudson Bay.

In this region, wildlife is abundant and carefully managed. Manitoba is well known for its moose, deer, and bear populations. More recently, Northern Manitoba's polar bear and beluga species have put the province on the international wildlife viewing and tourism maps.

Its rivers were the transportation highways of the past and, as a result, the history of the region is legendary. York Factory was, at a point in history, the major transshipment and supply point in the North American fur trade.

1.1

TOURISM HISTORY IN MANITOBA'S NORTH

For many decades, the rich natural resources of Manitoba's North attracted hunters and anglers from national and international origins. Some 258 lodges and outfitters and 250,000 licence holders (2010) attest to the size and importance of this tourism sector. While 81% are Manitobans, some 12% are American visitors, and 7% are Canadians from outside Manitoba.

Hunting and fishing economic impacts are estimated to generate \$312 million in GDP to Manitoba, sustain 7,500 jobs, and generate \$70 million in taxes to all governments annually. Lodge and outfitter operators received an estimated \$26 million of direct revenue impact in 2010. Manitoba's North receives a strong, if not specifically documented, share of this hunting and fishing impact.

While hunting and fishing tourism has prospered for many decades, adventure tourism is a more recent tourism sector in Manitoba's North. The growth of Churchill as an international destination for polar bear viewing has created global brand recognition for the North and for Manitoba. The addition of the beluga whale experience in recent years has expanded the Churchill tourism product to three seasons and has increased brand recognition for this destination as "the place" to see the rare Northern species in their natural habitat.

Adventure tourism experiences offered in Manitoba's North include river canoe and kayak experiences, wildlife and nature walking tours, wilderness camping, and ecotourism adventures.

In addition to the above specific sectors of tourism, national and provincial parks and campgrounds are important recreation and heritage tourism products in Manitoba's North. These resources have hosted thousands of recreational visitors and tourists to experience Manitoba's Northern outdoors over time, and are important to ongoing and sustainable use of the resources in the region.

Northern Manitoba's Indigenous population is 74% of the total 88,000 residents. Indigenous oral history offers stories, legends, and lessons that would fascinate visitors. With 29 First Nations in Manitoba's North, there is great potential for collaboration with

Indigenous communities to develop oral history in the area of tourism that presents Indigenous culture and traditions and that tells the history of communities from an Indigenous perspective.

With this strong tourism history as a background, the tourism industry in Manitoba's North has come together to prepare a strategy that looks forward to a tourism future for the area. This report documents their work together and provides a blueprint for action in the coming five years.

1.2

STRATEGY PROCESS

The strategy process was led by a stakeholder steering committee and supported by Travel Manitoba and Tourism North. It consisted of three industry meetings punctuated by research and analysis supporting the process. The following meetings were held in Manitoba's North:

- **September 2016** – A facilitated meeting of industry operators addressed issues and opportunities and recommended a formal strategy process.
- **February 2017** – The inaugural meeting of the Steering Committee confirmed issues and opportunities and developed initial Strategic Priorities and draft Key Results for the strategy.
- **April 2017** – An industry meeting in The Pas/Opaswayak Cree Nation finalized key elements of the strategy.

Members of the Steering Committee included:

- **Johanna McLauchlan** – Chair, Tourism North, Rocky Lake Birchworks Ltd.
- **Penny Byer** – Thompson City Council
- **Laura Finlay** – Community Futures North Central Development
- **Chuck Davidson** – Manitoba Chambers of Commerce; Co-chair, Northern Economic Development Strategy
- **Gary Bell** – Calm Air International
- **Paul Turenne** – Manitoba Lodges & Outfitters Association

INTRODUCTION

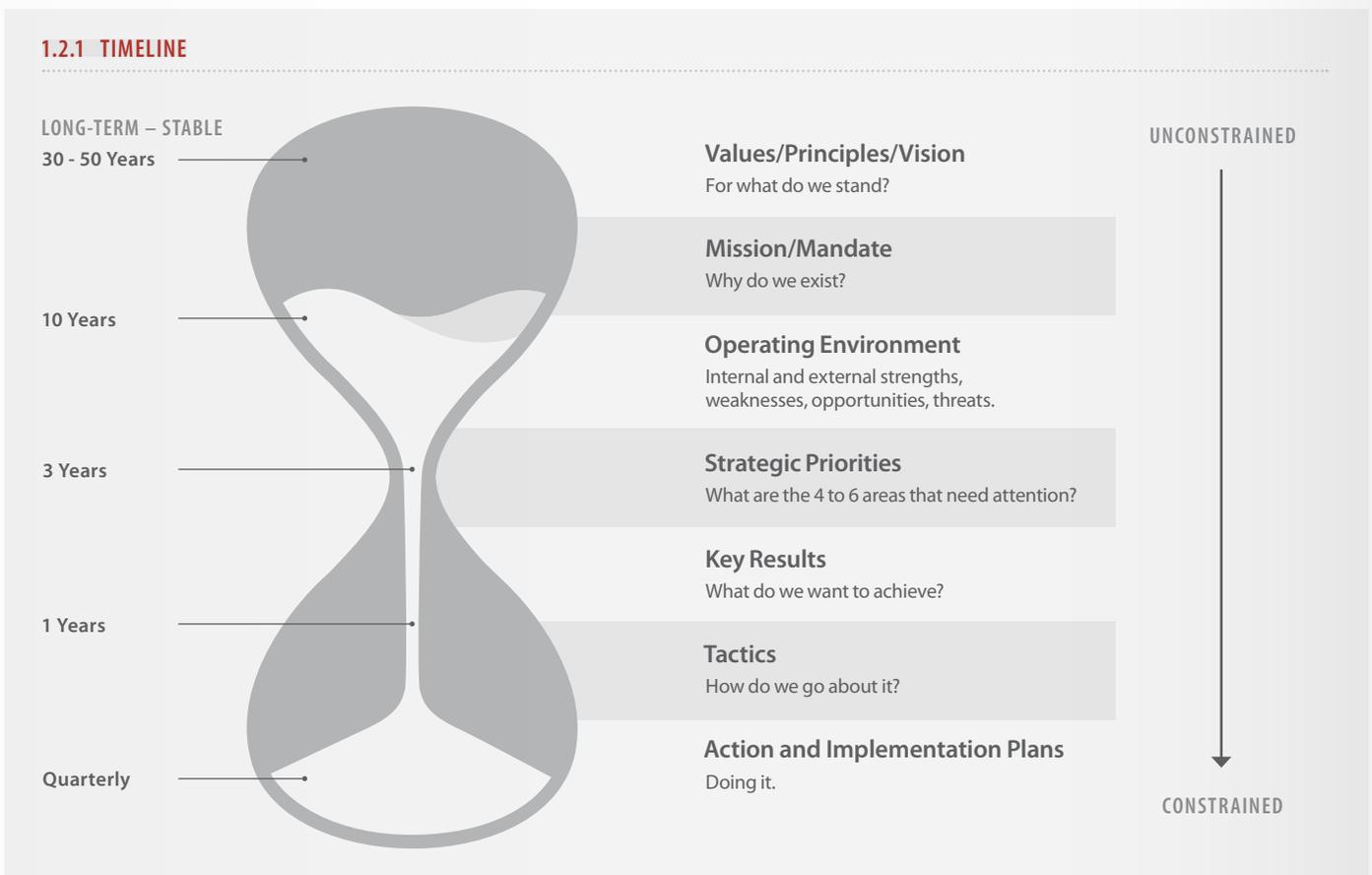
- **Tara Stefansson** – Lazy Bear Expeditions
- **Becky Cianflone** – Community Futures Greenstone
- **Colleen Smook** – McCreedy Campground
- **Keith MacDonald** – Chamber of Commerce, Thompson
- **Christian Sinclair** – Onekanew (Chief) of Opaskwayak Cree Nation 315; Co-chair, Northern Economic Development Strategy
- **Michael Woelcke** – Via Rail
- **Volker Beckmann** – Spirit Way Inc.
- **Colin Ferguson** – Travel Manitoba
- **Brigitte Sandron** – Travel Manitoba
- **Lilian Tankard** – Travel Manitoba

Travel Manitoba has supported the process, retained the facilitator, and acted as editor/project manager for the strategy development. Kent Stewart, Director at Western Management Consultants (WMC), facilitated the formal strategy process with the Steering Committee, and was responsible for drafting the reports.

1.2.1

THE WMC HOURGLASS STRATEGIC PLANNING MODEL

The facilitated strategy approach was based on a strategy planning model that has been used by WMC in hundreds of corporate and non-profit strategic plans over many decades. This strategy development process focused on consensus decisions by tourism industry partners in Northern Manitoba. The strategy process is presented graphically following.





The process engages participants in dialogue with each other around the various elements of strategy. The Vision and Mission are articulated at a high level. The Operating Environment is a more detailed discussion that resolves to Key Issues and Key Opportunities for the coming five years.

Strategic Priorities are the few areas of focus for the strategic plan. Key Results are statements of the outcomes that will be accomplished within each Strategic Priority. Finally, Tactics are “What we will do” to accomplish those outcomes.

This report addresses these areas of strategy and reflects the consensus of the participants as to how we should move forward in the coming five years.

1.3

OBJECTIVES OF THE STRATEGY

The objectives of this strategy are:

- To work collaboratively with tourism industry from Manitoba’s North in the preparation of a realistic, achievable tourism strategy focused on the coming five years;
- To articulate the Strategic Priorities that will guide tourism development activity during this period;
- To identify Key Results and Tactics, focused in the few areas of priority, that will achieve outcomes desired; and
- To create a report that can be referenced by industry to measure progress over the next five years.

1.4

REPORT STRUCTURE

The report follows the basic structure of the WMC Hourglass strategy process. Beginning with the Goal and Vision for the strategy, the report then focuses on the Operating Environment and community structure and its potential for tourism development. In latter sections of the report, the core elements of strategy are addressed.

VISION, MISSION, AND GOAL

2.1

VISION FOR NORTHERN MANITOBA TOURISM STRATEGY

A vision describes a realistic, credible, attractive, and inspiring future for the region. It paints a picture of the long-term future to which the region aspires; that is, the broad targets they would like to achieve. Vision looks 10 and sometimes 20 years into the future toward what could be for Northern Manitoba tourism.

While a larger and more detailed vision for tourism in Northern Manitoba may be developed in coming years, the Steering Committee addressed the vision for the next 10 years as follows:

Vision for Northern Manitoba

Northern Manitoba, Canada's Northern Heartland, engages visitors through exceptional experiences in accessible Canadian wilderness, wildlife and Northern heritage.





2.2

MISSION FOR NORTHERN MANITOBA TOURISM STRATEGY

Mission describes the main purpose of an organization. It answers the question, “Why Do We Exist?” within the context of the regional tourism strategy. The mission for the tourism industry collaboration that will execute the strategy is as follows:

Mission for Northern Manitoba Tourism, 2017-2022

The Mission is to grow tourism in Northern Manitoba through product development, marketing and leveraging community support.

2.3

GOAL OF THE STRATEGY

The overall goal for the five-year strategy was determined by the Steering Committee to be an achievable growth from the current (2014) estimated tourism expenditures in Manitoba’s North.

Goal of the Northern Manitoba Tourism Strategy, 2017-2022

Increase Northern Manitoba tourism expenditures from \$116 million in 2014, to between \$132 million and \$151 million annually by March 2022.

MANITOBA NORTH: A TOURISM SYSTEM

The summary of the operating environment and situation for Northern Manitoba begins with the tourism context within which we consider this information – the context of tourism as a system.

The overall economy of the region is then considered. Finally, the tourism and community context of the region is considered in the context of strategic potential.





3.1

THE FUNCTIONING TOURISM SYSTEM

Several concepts in tourism were used in the consideration of the operating environment for Northern Manitoba.

When considering destination development in tourism, it is helpful to think of the various components of the system that must be functioning and well-aligned for the system to succeed.

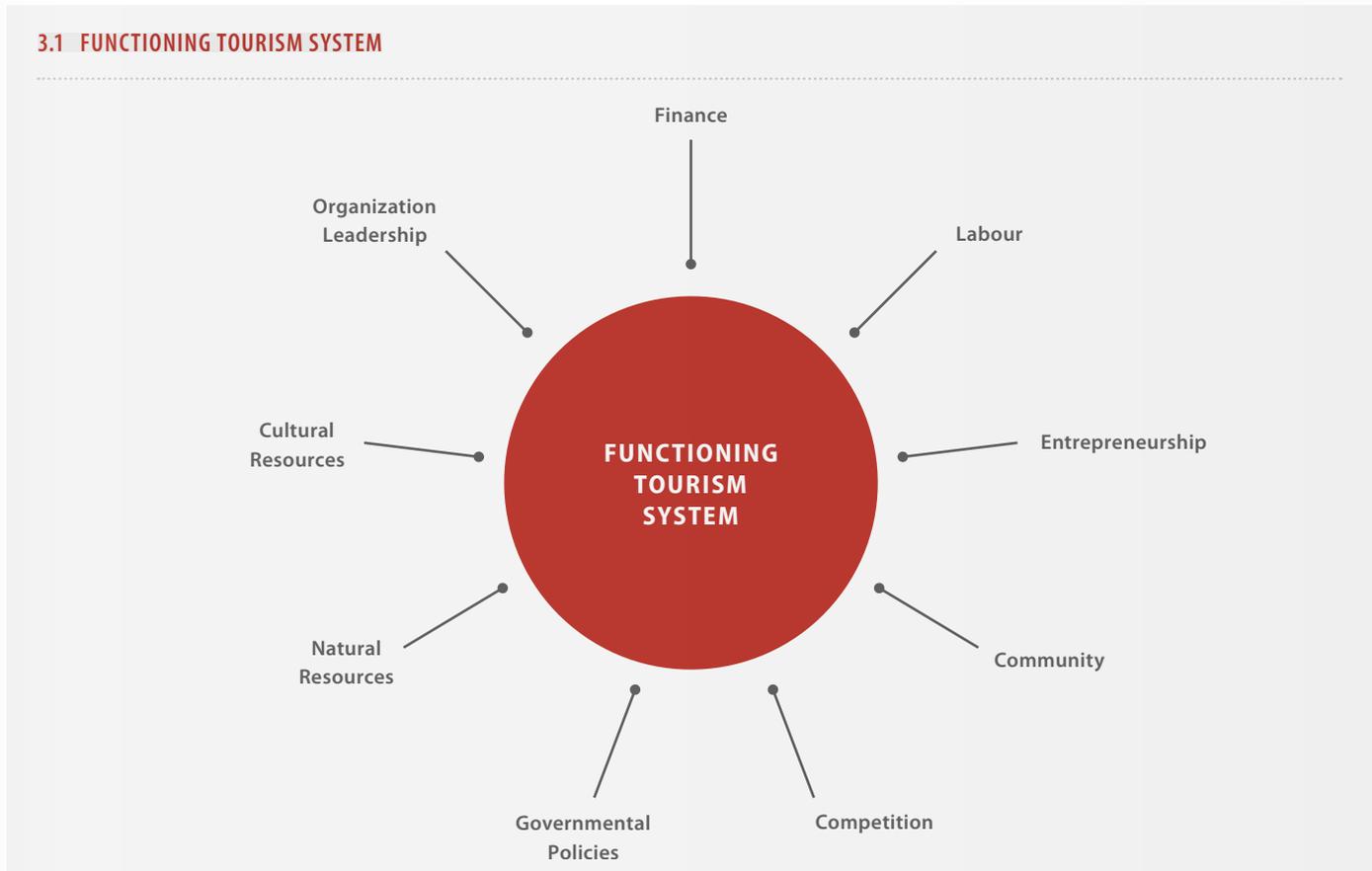
As we research the economic, community, and regional situation in Manitoba's North, we think of its capacity in terms of the categories identified. Does the region have a labour issue that would make it difficult to attract labour for tourism growth? Are there entrepreneurs in the region ready to address opportunities for tourism development, and can they access the capital that will be needed?

Are communities supportive of tourism growth? Sometimes communities that have a history of extractive resource development do not embrace tourism immediately or readily. Additional work needs to be done to show these communities the benefits which may be realized from tourism.

Do natural and cultural (man-made) resources in the area support tourism development and growth? Do these tourism growth opportunities face stiff competition from other regions or are they relatively unique?

And finally, are government processes aligned, and is organizational leadership committed to the tourism development vision for the region?

All these factors are important to regional tourism development. Alignment of these factors is the challenging task of the tourism stakeholders who develop the vision and strategy for the region.



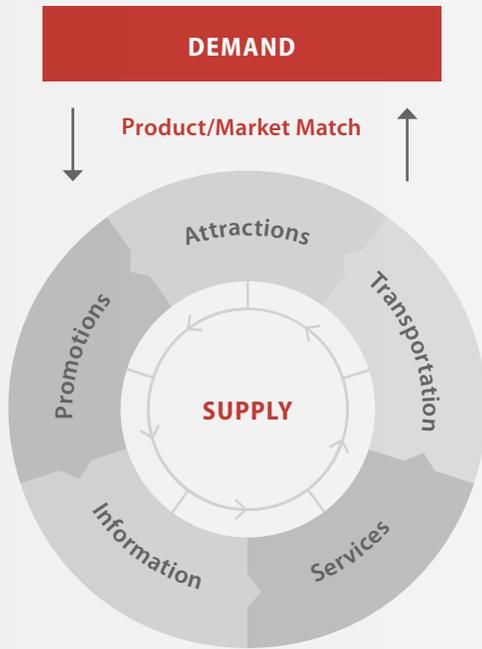
MANITOBA NORTH: A TOURISM SYSTEM

3.2

PRODUCT-MARKET MATCH

When we consider tourism destination development opportunities, we are considering the relationship between tourism markets and existing or planned tourism products and attractions. But we also consider the level, capacity, and quality of tourism infrastructure, services, information/direction, and transportation. Finally, tourism promotion helps bring the market to the region. All of these factors are linked and must be aligned to create a successful product-market match for the region.

3.2 THE TOURISM SYSTEM



3.3

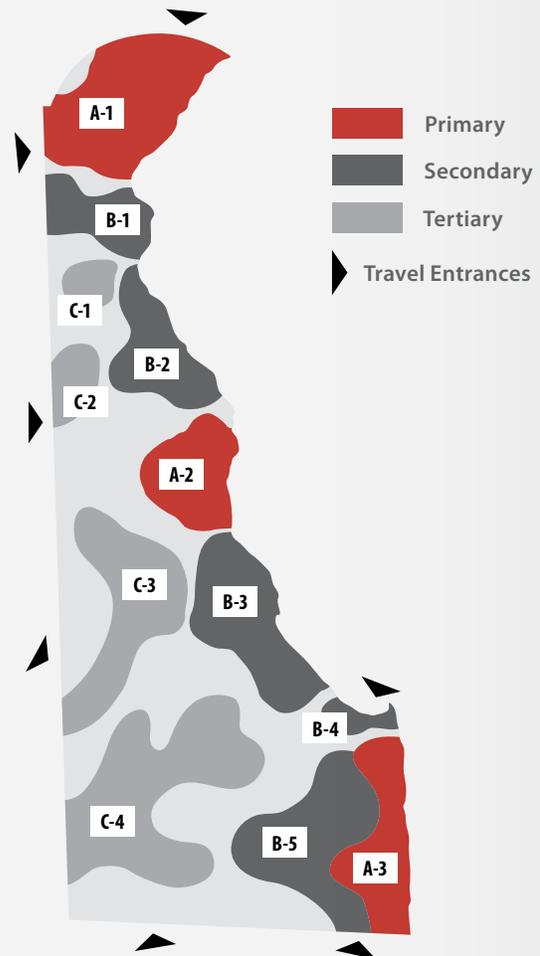
DESTINATION PLANNING – REGIONAL ASSESSMENT

Regional assessment considers both natural factors and cultural (man-made) factors to address tourism potential. (The illustration is from Clare Gunn’s Delaware assessment in Tourism Planning, 4th Edition.)

In each sub-area within the region, a careful assessment of existing uses, surface rights, natural factors, environmental strengths or attractions, historic or heritage features, and existing man-made features that may be of interest is completed. Accessibility is critical and is considered in this assessment. The result is a prioritization of areas within the region as “high potential” for tourism development.

This natural/cultural factors assessment has been completed only at the very highest level in this strategy. The experience and knowledge of the participants about the region was relied upon in the facilitated process. Future and more detailed assessment of this nature could be completed as plans for specific areas are addressed.

3.3 POTENTIAL TOURISM DEVELOPMENT ZONES





3.4

DESTINATION PATTERN ASSESSMENT

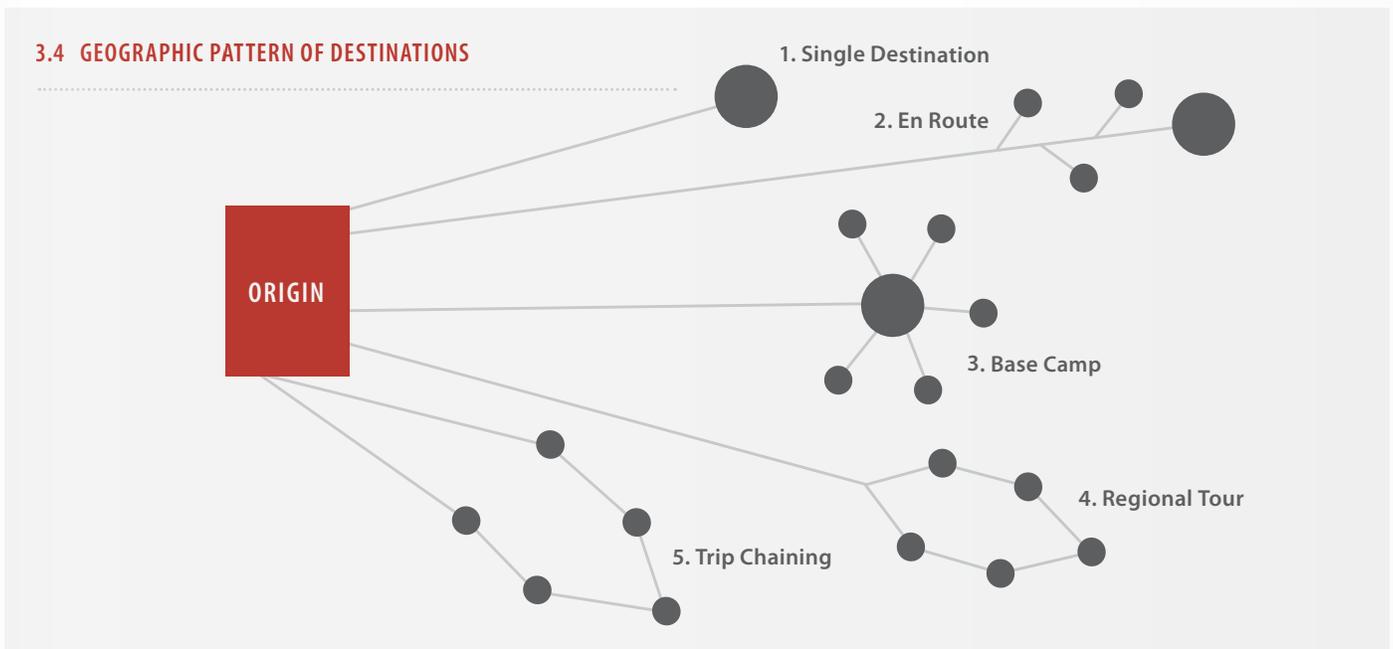
Overnight tourism requires tourism service infrastructure that can be found in communities in the region. **Assessing community readiness** in terms of the types of tourist trips one may expect is fundamental to the planning of a tourism region.

Many different types of geographic trip patterns are assessed in terms of the destination and travel distances anticipated.

In the graphic below, trip type 1 is the single destination trip. The visitor travels from an origin to a specific destination for a tourism experience. A fishing lodge visitor might be an example of such a trip.

In sample 3 in the graphic, the Base Camp, a visitor may use a destination as a base for experiences in the region around it. So a visitor to Churchill may go out from that base for an ecotourism experience near Seal River, or a heritage experience in Wapusk National Park, for example.

The trip patterns illustrated were considered in the assessment of tourism potential in Northern Manitoba that follows.



3.5

CONCLUSION

While the conceptual framework for the tourism strategy development operates in the background, it plays an important role in each focus area of the strategy. In the strategic assessment following, these concepts and approaches inform the assessment.

STRATEGIC ASSESSMENT: TOURISM IN NORTHERN MANITOBA

This section contains the high-level assessment of the economic and tourism situation that informs the preparation of the strategic plan.





4.1

OVERALL ECONOMY

The regional economic heritage is a resource extractor and supplier to markets. From its post-contact history as a fur trade centre and transportation hub through its mining heritage and strength today, it has been a region of resource extraction and processing. The economic drivers reflect this background.

Based on a summary prepared by Economic Modelling Specialists International in 2015 using 2014 data, the following highlights refer to the broad Northern Manitoba economic region.

- **Population – 88,289 in 2014**
- **74.5% of the regional population self-identifies as Indigenous**
- **A young population, with median age in the 30-35 range**
- **Dependency Ratio – 10-15% (**very low**). Comparable data for Canada suggests seniors' dependency ratios in the order of 40% in many regions.**
- **The top economic drivers of the region are:**
 - Mining
 - Health Care
 - Manufacturing
 - Education
- **Regional unique strengths are identified as:**
 - Non-ferrous metal production and processing (except aluminum)
 - Metal ore mining
 - Electric power generation, transmission, and distribution
- **Sectors identified as job growth areas, but not yet economic drivers were:**
 - Construction
 - Transportation and warehousing
 - Professional, scientific, and technical

Tourism is not identified as an economic driver in this assessment. One of the reasons for this lack of recognition is tourism does not have a single industrial classification under the North American Industrial Classification System (NAICS). Thus, while health care is covered under one major code, tourism is distributed in many other areas and NAICS codes.

Further data from this overview of the Northern economy is illustrated in the jobs data presented below:

• **TOP EMPLOYERS IN 2014:**

- Health care and social assistance – 4,916
- Public administration – 4,780
- Educational services – 4,027
- Retail trade – 3,606
- Manufacturing – 2,506
- Mining – 2,160

• **HIGHEST JOB GAINS – 2006-2014**

- Construction – 718
- Mining – 503
- Transportation and warehousing – 349
- Professional, scientific, and technical – 231
- Health care and social assistance – 92

• **HIGHEST JOB LOSSES 2006-2014**

- Agriculture – 602
- Administrative and support, waste management – 426
- Public administration – 365
- Accommodation and food services – 293
- Arts, entertainment, and recreation – 169

In the categories above, tourism is not specifically identified. However, in the section on job losses, "accommodation and food services" shows the fourth highest job loss in the region during this period. This is a subsector of tourism, and its losses suggest that tourism must not have done that well during the period referenced.

This report also shows that the Northern economy demonstrates a higher number of lower income households and fewer higher income households than Manitoba as a whole. Therefore, it likely lags behind Manitoba as a whole in household disposable income. This impacts the capacity of the resident population to support tourism as investors and as visitors.

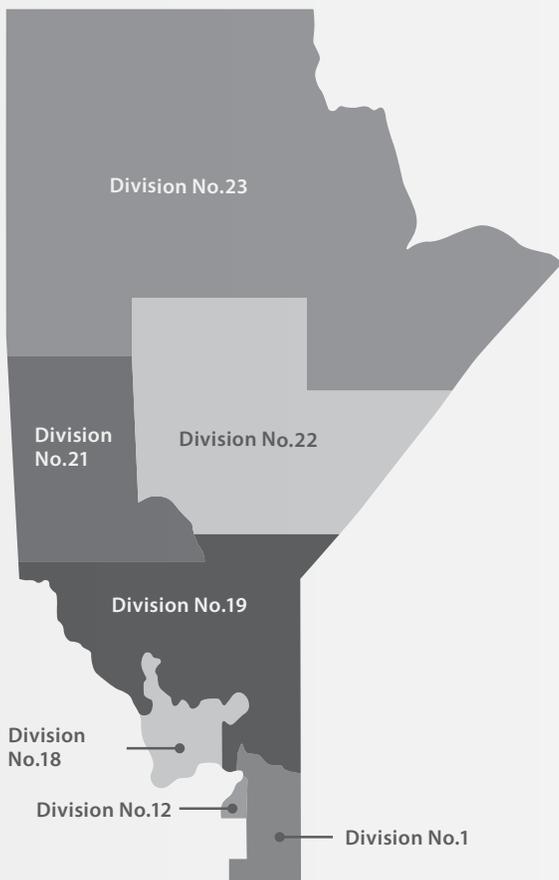
MANITOBA NORTH: A TOURISM SYSTEM

4.2

CENSUS DIVISION SUMMARIES

The economic story for the region is somewhat different when profiled at the census division level. Each Census Division (CD) has economic and tourism characteristics different from the others. The number in brackets found before the category refers to the two-digit NAICS code for this data. The North American Industrial Classification System is the data set from Statistics Canada that provides this detailed CD level data. For example, (72) Accommodation and Food Service refers to the accommodation NAICS code at the two-digit level.

4.2 CENSUS DIVISION



CD 19

- Population fell from 12,222 in 2011 to 12,116 in 2015; had grown slow/steady since 1991 (9,596)
- Overall 2011-2015 jobs fell from 10,362 to 10,335 (-0.26%); Manitoba (3.54%):
 - (72) Accommodation and Food Service (+4.9%) (881 jobs); Manitoba (+6.61%)
 - (71) Arts, Entertainment, Recreation (-14%) (104 jobs); Manitoba (+7.35%)
 - (11) Agriculture, Forestry, Fishing and Hunting (-33.2%) (92 jobs); Manitoba (-8.25%)
 - (7,225) Eating places 23 of 24 top employers (10 businesses, 32 staff)

Tourism cluster was not a strong cluster in economic analysis for this Census Division.

CD 21

- Population grew from 21,110 in 2011 to 21,349 in 2015; up from a low of 20,036 in 2006
- Overall between 2011-2015, jobs grew from 4,214 to 4,222 (0.19%); Manitoba (3.54%):
 - (72) Accommodation and Food Service (-16.2%) (61 jobs); Manitoba (+6.61%)
 - (71) Arts, Entertainment, Recreation (-23.5%) (22 jobs); Manitoba (+7.35%)
 - (11) Agriculture, Forestry, Fishing and Hunting (-18.2%); (75 jobs); Manitoba (-8.25%)
 - (7,225) Eating places fourth among top employers (37 businesses, 563 staff) in 2015
- (72) Accommodation and Food Service was fifth highest employer (881) in CD 21 to 2015
- (72) Accommodation and Food Service had third highest job gains (41) in CD 21 to 2015
- (11) Agriculture, Forestry, Fishing and Hunting had fourth highest job losses (46) in CD 21 to 2015



The economic analysts found enough strength in CD 21 in the tourism cluster to flag it as a potential growth cluster in that region. The tourism cluster in CD 21 refers to the aggregate of the 14 four-digit NAICS codes found in the first column. In the far-right column, where the Location Quotient is 1.2 or larger, it flags those tourism areas for growth potential.

Cluster Strengths in CD 21 – Hospitality and Tourism Cluster

HOSPITALITY AND TOURISM

NAICS	NAICS Description	2015 Jobs	2015 Businesses	Location Quotient
7211	Traveller accommodation	276	22	2.71
7132	Gambling industries	59	1	2.57
4539	Other miscellaneous store retailers	37	1	1.20
7212	Recreational vehicle (RV) parks and recreational camps	24	29	2.35
7139	Other amusement and recreation industries	23	13	0.26
5615	Travel arrangement and reservation services	14	3	0.54
7121	Heritage institutions	11	0	0.85
1142	Hunting and trapping	<10	2	4.42
5322	Consumer goods rental	<10	2	0.61
7213	Rooming and boarding houses	<10	2	1.71
7112	Spectator sports	<10	1	0.66
4871	Scenic and sightseeing transportation, land	0	0	0.00
4872	Scenic and sightseeing transportation, water	0	0	0.00
7131	Amusement parks and arcades	0	0	0.00

CD 22

- Population grew from 43,130 in 2011 to 44,832 in 2015; steady growth since 1991
- Overall jobs fell from 14,579 in 2011 to 13,755 in 2015 (-5.65%); Manitoba (3.54%):
 - (72) Accommodation and Food Service (-18.8%) (721 jobs); Manitoba (+6.61%)
 - (71) Arts, Entertainment, Recreation (-6.1%) (105 jobs); Manitoba (+7.35%)
 - Information and Cultural Industries (-46.9%) (77 jobs); Manitoba (-11.86%)
 - (11) Agriculture, Forestry, Fishing and Hunting (-24.3%) (23 jobs); Manitoba (-8.25%)
- (72) Accommodation and Food Service was ninth largest employer (721) in CD 22 to 2015
- (72) Accommodation and Food Service had third highest job losses (166) in CD 22 to 2015
- (11) Agriculture, Forestry, Fishing and Hunting had the third lowest job losses (7 jobs) in CD 22 to 2015

MANITOBA NORTH: A TOURISM SYSTEM

CD 23

- Population grew from 10,372 in 2011 to 10,768 in 2015; steady growth since 1991
- Overall jobs grew from 4,464 in 2011 to 4,572 in 2015 (+2.42%); Manitoba (3.54%):
 - (72) Accommodation and Food Service (-2.4%) (49 jobs); Manitoba (+6.61%)
 - (71) Arts, Entertainment, Recreation (+3.9%) (87 jobs); Manitoba (+7.35%)
 - Information and Cultural Industries (-8.0%) (14 jobs); Manitoba (-11.86%)
 - (11) Agriculture, Forestry, Fishing and Hunting (0.0%) (5 jobs); Manitoba (-8.25%)
- (72) Accommodation and Food Service was the fourteenth highest employer (49) in CD 23 in 2015

The conclusion or inference that may follow from this census division assessment is that tourism, or at least the sectors of tourism reported individually, are not growth drivers in Northern Manitoba. The one positive indicator is that CD 21 may offer some potential for tourism if we look at it more as a cluster of industries. This is what is done in the following section.

4.3

TOURISM CLUSTER ANALYSIS (2011-2016)

Cluster assessment considers the relative strength of industrial clusters, each one comprising a number of individual NAICS codes. Economists working on the Northern Economic Development Strategy addressed a tourism cluster containing some 22 individual NAICS codes. Their assessment of the strength of this cluster relative to other clusters, and to Manitoba as a province, follows. The tourism cluster in Northern Manitoba was assessed for the period 2011-2016.

The economic assessment describes the tourism cluster as the number two sector in the North in terms of jobs in 2016:

- Tourism cluster was the second highest employer (2,621) in the economic region in 2016, behind only Local Health Services (3,604).
- 2,621 jobs in 2016; down by 247 from the 2,868 jobs reported in 2011.
- Tourism had the highest job losses (247) of all clusters in the period 2011-2016, losing 8.6% of its jobs in this period. In the same period the tourism cluster in Manitoba grew by 4.59%.
- Location quotient analysis suggests that tourism has medium to high strength (LQ 0.87 in 2016) and is stable as a cluster in the region.
- Census Division 21 shows promise for tourism as an economic cluster.

THE RESULT: COMPETITIVE ADVANTAGE OF TOURISM

- In the cluster analysis conducted by the economists, the tourism cluster in Northern Manitoba is among the industries classified as **mature**.
- While it is a large employer, it shows high job losses for the period 2011- 2016.
- The cluster has a location quotient near 1.0, which means it is stable, but not demonstrating high potential.
- The analysis shows mining as a large employer with job gains and a very high location quotient (13.05). This industry would be considered the regional “star” industry in this analysis.
- From an investment perspective, tourism would be one industry among several that could be considered for investment based on the cluster analysis. Further research would be required to confirm its appeal for investment.
- Cluster analysis measures the past; it does not model the future. So, it is one way of comparing past performance of sectors of the economy, but is one among many research approaches. The tourism industry is and should be focused on the future, where the industry can plan its path forward.

While the conclusion from this assessment might be that this region remains primarily an extractive resource region, there is some potential in careful development of the tourism cluster as a growth sector. Further, in terms of specific regions within the North, there may be some potential for destination development.

4.4

THE TOURISM ECONOMY

Specific data on the tourism economy of Manitoba's North provides comparative insights for this region of the province in relation to other regions. It is also based on the tourism cluster as represented by visitor spending, rather than individual components of tourism. The table following captures expenditure data for 2014.

The perspective of the tourism economy in Northern Manitoba adds some important insights to the tourism potential. The following information from 2014 tourism research provides insight:

- The Northern Manitoba region was fifth among six regions (outside Winnipeg) in terms of total person-visits in 2014, generating 530,000 person-visits. This was 5% of total visits recorded in Manitoba.
- The region was **third** in terms of total expenditure (\$116 million), representing 8% of total Manitoba tourism revenue.
- The region was **first** in terms of average per capita expenditure, at \$219 per person visit, and almost double the next highest region outside Winnipeg.
- The region was **second** in terms of the ratio of overnight to day trip visits.

COMPARATIVE VISITATION AND EXPENDITURE, MANITOBA TOURISM REGIONS, 2014

Region	Person-Visits	Percent of PV	Spend	Percent of Spend	Per Person Visit	O/N Visits	Day Trips
Northern Manitoba Region	530,000	5	\$116,000,000.00	8	\$218.87	234,000	294,000
Eastern Manitoba Region	2,223,000	20	\$138,400,000.00	9	\$62.26	718,000	1,505,000
Interlake Region	1,326,000	12	\$91,400,000.00	6	\$68.93	377,000	948,000
Parkland Region	467,000	4	\$53,000,000.00	4	\$113.49	208,000	258,000
Central Manitoba Region	1,227,000	11	\$101,000,000.00	7	\$82.31	300,000	926,000
Southwest Region	1,811,000	16	\$211,000,000.00	14	\$116.51	494,000	1,318,000
TOTAL	7,584,000	68	\$710,800,000.00	48		2,331,000	5,249,000

Compiled by WMC, 2017 numbers may not add due to rounding

MANITOBA NORTH: A TOURISM SYSTEM

The Northern Manitoba region plays an important role in Manitoba's tourism performance:

- Tourism created a \$28-million contribution of direct taxes in 2014.
- Overnight visitors to the region accounted for 44% of total visits; day visitors comprised 56% of total visits.
- Overnight visitors to the region accounted for 44% of total visits but 80% of total spending in 2014.
- Main trip purpose for 49% of Northern visitors is "pleasure". Some 32% come to visit friends and relatives. However, a whopping 70% of visitors to the North stay with friends and relatives while on a Northern trip. Only 22% stayed in hotels.
- The average length of stay for overnight visitors was 3.1 nights.
- 48% of total expenditures was by Manitobans, 45% by American visitors, 5.2% by "other Canada", and 1.9% by overseas visitors.
- The table following summarizes the performance of each origin market to Manitoba's North using typical metrics for overnight visitors:

COMPARATIVE DATA: OVERNIGHT VISITORS TO NORTHERN MANITOBA, 2014

Origin	% Visits	% Spend	PP/PV*
Manitoba	79.06%	36.49%	\$184
Other Canada	10.26%	5.08%	\$198
USA	10.26%	56.03%	\$2,180
Overseas	0.43%	2.39%	\$2,229
Total	100.00%	100.00%	\$399

*per person/per visit

- While Manitobans account for almost 80% of visits, they contribute only 36.5% to revenue.
- Other Canadians account for 10% of visits but only 5% of revenue.
- American markets, however, make up only 10% of visits, but they account for 56% of revenue in the North.
- Finally, the small overseas market represents under half a percent of visits but accounts for 2.4% of revenue.

- Average spending by overnight visitors per person/per visit was \$184 by Manitobans, \$198 for "other Canadians", \$2,180 for American overnight visitors, and \$2,229 by overseas visitors.
- The highest expenditures for Northern Manitoba overnight visitors was on transportation (32%) followed by accommodation (25%), and then by food (20%).
- The largest markets of origin are Manitoba, Ontario, and Saskatchewan, in that order.
- The most popular activities while on trips to Manitoba's North found in past (2014) research included:
 - Fishing (27%)
 - National, provincial, or nature park (23%)
 - Boating (23%)
 - Casino (10%)
 - Museum or art gallery (5%)
 - Historic site (5%)

This profile suggests that Manitoba's North is a desirable recreation/vacation spot for Manitobans and nearby markets at present. The international visitation data reflects the international interest in the Churchill area and its impact on regional data. And, as can be expected, international visitors spend much more in the region on a per person/per visit basis than do visitors from nearby.

Note: data for this analysis should be used with caution because of small sample sizes.

4.5

POTENTIAL MARKETS FOR NORTHERN MANITOBA

The existing markets for Northern Manitoba have been referenced above:

- Pleasure travel markets focused on fishing, outdoor adventure, recreation, hunting, and heritage.
- Visiting friends and relatives markets, generally from close-in origins.
- Small but important international markets, most likely representing the Churchill markets, and a small hunting and fishing segment.



What about potential and future markets for Northern Manitoba?

- Future markets for Northern Manitoba may not be coming to the destination at all at this point. However, these high potential markets are on Travel Manitoba's radar, and the agency is marketing to those segments where there is a product offerings match. The two highest potential segments are: Authentic Experiencers (AE) – independent travellers seeking vast nature and local culture; and
- Cultural Explorers (CE) – independent travellers who want to immerse themselves in local culture of places they visit.

The product and experience mix in Northern Manitoba could be enhanced to align with the interests of these segments over the longer term. There is significant competition for these markets and they are target markets for many of our own Canadian provinces. However, Northern Manitoba has three assets that appeal to these segments:

- Vast natural landscapes with unique features and unique wildlife in a Northern lifestyle environment.
- Significant cultural resources with extant protected resources that tell the tale of both the fur trade and transportation in an era some hundred years before Confederation.
- Indigenous culture and stories that are passed down through oral history.

While some of these themes are only partially developed in Manitoba's North, they would arguably resonate with these two market segments. A partial description of each segment is provided below.

4.5.1

WHO ARE MANITOBA'S AUTHENTIC EXPERIENCERS (AE)?

Authentic Experiencers (AE) want the best of both worlds – vast natural settings and local culture. These travellers are spontaneous, independent and open-minded – and they want to learn. Manitoba's rich cultural events, attractions and communities, as well as our incredible natural settings and wildlife, really speak to these people.

What is an Authentic Experiencer's view on life?

- AEs are focused on maintaining control and autonomy in their lives. Many are retired, with time to do the things they want to do.
- They enjoy the unexpected in life and welcome and appreciate surprises.
- They are not influenced by brand as an indication of quality or status.
- AEs enjoy experiencing foreign culture in their lives, like going to an Inuit art gallery or dining at a Thai restaurant.
- Although relatively affluent, AEs derive little joy from consumption. However, they are willing to pay for quality products they value.
- With a high sense of personal control over their lives, few Authentic Experiencers are concerned with getting ahead in life or taking on risky pursuits for potential gain – financial or otherwise.

For Canadian Authentic Experiencers

- Canadian AEs are older, more highly educated, and almost as many are retired as working full time.
- More live in city neighbourhoods, fewer in towns or rural areas.
- Most take one to two weeks of vacation out of town.
- Physical health and well-being are a priority.
- Canadian AEs are more creative and expressive than their global counterparts.

What does an Authentic Experiencer look for in a vacation experience?

- AEs love trips that teach them about history as well as cultural differences.
- They actively seek out the most authentic cultural experience possible rather than a whirlwind tour of the "must-sees".
- AEs love connecting with locals – they prefer to do their own thing and stay away from tourist crowds.
- AEs are less likely to seek out luxury amenities or gourmet experiences.

MANITOBA NORTH: A TOURISM SYSTEM

- Travel is not about escape from day-to-day, rather a focus on learning.
- AEs also enjoy nature, but not more so than average.

Why do Authentic Experiencers travel?

The Authentic Experiencer is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see and when they see it.

Authentic Experiencers are inspired by these types of activities and experiences when they travel:

- Seeing beautiful beaches
- Visiting national and provincial parks to see wildlife
- Viewing Northern Lights
- Multi-day touring on their own by car
- Visiting well-known historic sites and buildings (e.g., Prince of Wales Fort, Sam Waller Museum)
- Participating in arctic safaris (polar bear viewing in Churchill)

What does an Authentic Experiencer like to do when they travel?

Activity Examples

- Marine life viewing
- Wildlife viewing
- Seeing beautiful coastlines, beaches
- Visiting well-known historic sites and buildings
- Visiting national and provincial parks to view wildlife
- Visiting small towns and villages
- Visiting national and provincial parks and their interpretive centres
- Viewing Northern Lights

4.5.2

WHO ARE MANITOBA'S CULTURAL EXPLORERS (CE)?

Cultural Explorers want to discover the entire experience of the culture, people and setting 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. They want to attend our festivals, watch for wildlife along heritage rivers and share a drink with the regulars at the local bar.

What is a Cultural Explorers view on life?

- CEs like to be spontaneous and will embrace events that are unexpected.
- They enjoy learning from other cultures and believe in the preservation of cultural heritage and customs.
- They can easily adapt to changes in modern life, treating it as a learning experience.
- CEs believe in balancing mind, body, and spirit.
- CEs are not status driven consumers; they are not showy in their purchases or travel.
- CEs are not often influenced by brands and are more likely to support small business, whom they feel will be responsive to their interests.
- They have a strong need to be unique and have little concern for staying on top of the latest fashion and trends.

For Canadian Cultural Explorers

- Canadian CEs tend to feel a little more time stressed, with less time to commit to travel.
- They have a very strong work ethic, and along with it, higher financial security.
- Canadian CEs tend to place greater focus on family than their global counterparts.
- They work hard for their money and enjoy spending it, but appreciate a good bargain where they see value.
- Canadian CEs are only average in their enthusiasm for new technology.
- They are also less enthusiastic than their global counterparts about sharing events with big crowds.



What does a Cultural Explorer look for in a vacation experience?

- CEs are always looking forward to planning and taking the next trip – they “live for travel” and feel it’s the best way to experience life and learn about different places and cultures.
- CEs like to learn about history and modern cultures of the places they visit.
- They like to experience the natural beauty of a destination.
- CEs are attracted to groups where they can socialize and share the experience with others.
- They seek authentic experiences and are not concerned with pampering or luxury stays – it’s all about connecting with locals.
- CEs love unstructured vacations and prefer to avoid schedules or checklist travel.

Why do Cultural Explorers travel?

The Cultural Explorer loves to travel and really values learning and discovering new things while travelling. They don’t want to feel like a “tourist”, and like to blend in with the locals for that authentic experience. CEs avoid rigid, tight schedules and prefer not to tour in groups. They are looking to be taken “off the beaten path” to the less “touristy” areas and want experiences that are fun, but provide a learning opportunity.

Cultural Explorers are inspired by these types of activities and experiences when they travel:

- Visiting and viewing natural wonders and heritage sites – like Northern Lights, Arctic safaris, archaeological areas.
- Discovering local markets, cuisines, and other local “foodie” experiences.
- Exploring the wildlife of national and provincial parks.
- Opportunities to meet the locals; cultural events and celebrations, fairs, festivals.
- Self-drive, multi-day touring of smaller, charming towns and villages.
- Experiencing the vibrancy of city neighbourhoods – architecture, museums, street festivals and performers.

What does a Cultural Explorer like to do when they travel?

Activity Examples

- Multi-day touring by car or train
- Eco-tours
- B&Bs, wilderness lodges or wilderness
- Yurts, camping
- Marine life viewing
- Wildlife viewing
- Visiting national and provincial parks and their interpretive centres
- Visiting well-known historic sites and buildings
- Attending farmers’ markets
- Dining in restaurants that offer local foods

Clearly there is new market potential for the North. The product development question for Northern Manitoba is: “How can we stimulate development of products to serve these markets, and how can we then attract these markets to a more remote location such as Northern Manitoba?”

4.6

CONCLUSIONS: THE OPERATING ENVIRONMENT

The overall conclusion from this assessment is that Manitoba’s North is in an emergent stage as a tourism destination. A focus on building product around tourism nodes in high potential sub-regions will prove to be a winning strategy over time. Nodal community strengths are assessed in the section following.

Based on this limited research, the following conclusions may be made:

- The strong and mature fishing and hunting base in the region results in well-located lodges in reach of many nodal areas.
- There is a large territory with potential for outdoor adventure tourism that is not fully tapped at this stage.

MANITOBA NORTH: A TOURISM SYSTEM

- Existing visitation patterns are local and regional, save for the fish/hunt product and Churchill area, which attracts national and international visitors.
- While a small fiscal part of the overall Northern economy, tourism is a large employer in that economy. It is therefore important to address sustainability and growth of this cluster.
- New market opportunities may exist by addressing the Cultural Explorer and the Authentic Experiencer holistic segments. Travel Manitoba is expert at addressing these segments and can assist Northern Manitoba when the time comes.
- Because the base is small and relatively fragile, growth efforts should be carefully focused on high potential nodal areas, with initial growth focused within a short travel distance of those nodes.
- Nodal communities should be identified and supported to act as hubs for tourism development.



COMMUNITY NODAL ASSESSMENT

This section provides a high-level assessment of the situation and strengths of each major community in the Northern region to serve as “nodes” of tourism growth and quality service in the future. Based on the destination conceptual model, it recommends roles for the communities.



COMMUNITY NODAL ASSESSMENT

5.1

CHURCHILL**POPULATION:**

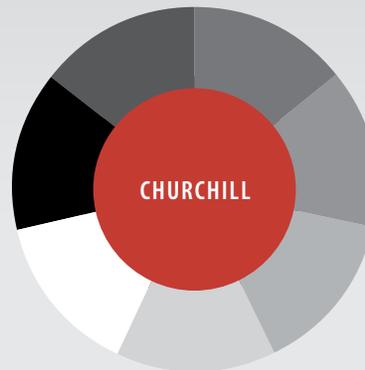
813 (2011), declining from 1,304 in 1981; original Thule people (circa 1000) who evolved to Inuit; Dene (AD 500); Chipewyan and Cree since contact in 1619.

ECONOMY:

Tourism, Ecotourism, Port, Arctic Research

TAG LINE:

"Polar Bear Capital of the World" "Beluga Capital of the World"



- Operators 15+
2 Receptives
- Transportation
Scheduled Air, Rail (1/wk)*
- Population 813 ↓
- Attractions 8
- Attractions 11
- Accommodation 203
- Services H

ATTRACTORS

(★ denotes Star Attraction)

- Town of Churchill ★
- Polar bears
- Beluga whales
- Birds
- Aurora
- Outdoor adventure/education
- National/Northern Heritage
- Wapusk National Park (PC)
- Fish/hunt

ATTRACTIONS

- Cape Merry Battery (PC)
- Prince of Wales Fort NHS (PC)
- Sloop Cove (PC)
- York Factory NHS (PC) original HBC post est. 1684
- Parks Canada Visitor Centre Churchill (PC)
- Churchill and Kaskatamagan Wildlife Management Areas
- Aurora Domes
- Hudson Bay Quest
- Arctic Trading Company
- Eskimo Museum/Itsanitaq Museum
- Churchill Northern Studies Centre

OUTDOOR ADVENTURE OPERATORS

- The Tundra Buggy Adventure
- Churchill Wild
- Arctic Nature Tours
- North Star Tours
- Lazy Bear Expeditions
- Blue Sky Expeditions
- Nature 1st Walking Tours
- Natural Habitat
- Watchee Lodge
- Wapusk Adventures (dogsled tours)
- Churchill River Mushing
- Sea North Tours
- Arctic Wolf Adventures
- Polar Bear Alley Expeditions
- Great White Bear Tours
- Churchill Nature Tours

RECEPTIVES

- Frontiers North Adventures
- Great Canadian Travel

HUNT/FISH

- Muskeg Country Outfitting
- Gangler's North Seal River Lodge

PC: Parks Canada

ACCOMMODATIONS

- Total rooms – 203

TOURISM SERVICES

- Full services – restaurants, retail, etc.
- Chamber of Commerce
- Town Centre Complex

TRANSPORTATION

- Air access Calm Air twice daily to Winnipeg
- Float plane base
- Rail access once a week (cargo)*
- Via Rail passenger service three times a week*
- Hudson Bay Helicopters
- No highway access

*Rail disruption at time of publication



5.2

THOMPSON

POPULATION:

13,123 (2011), City declined from 19,000 in 1971
35% Indigenous, 58% European
Young city – average age 30.6 years

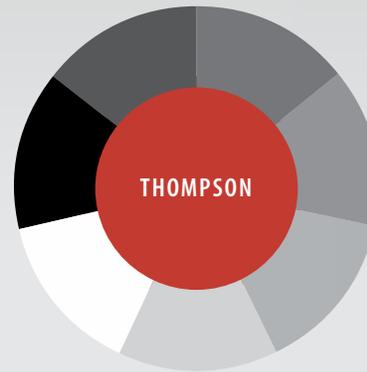
Founded in 1956 as Inco Mine

ECONOMY:

Mining, NRC and EnviroTREC aerospace design testing centre
ECWTF Ford car test facility

TAG LINE:

“Hub of the North”



- Operators 5 F/H
2 Other
- Transportation
Scheduled Air, Rail, Hwy 6,
391, 280
- Population 13,123 ↓
- Attractors 6
- Attractions 7
- Accommodation 625
- Services H

ATTRACTORS

(denotes Star Attraction)

- Spirit Way Inc. – walking and bike path with 16 points of interest
- Miner Statue – celebrating mining history
- Heritage North Museum
- Tawipisim “Pathway to the Sun”
- Pisew Falls – Kwasitchewan Falls
- Paint Lake Provincial Park

ATTRACTIONS

- Thompson Golf Course
- Mystery Mountain Winter Park
- Pisew Falls Provincial Park
- Ma-Mow We-Tak Friendship Centre
- Nickel Days festival and King Miner contest
- Thompson Lodge and Ecotourism Centre
- Thompson Aboriginal Day

HUNT/FISH

- Mystery Country Lodge and Outposts
- Trapper Mikes Outfitting Service
- Paint Lake Lodge
- All Terrain Bear Hunts
- Johnson Road Outfitters
- North Haven Resort air strip
- Riverlodge Place Conference Centre

ACCOMMODATIONS

- Total rooms – 625 tourist class rooms
- Mystery Lake Motor Hotel (Indigenous-owned property)
- Days Inn
- McCreedy Campground
- Paint Lake Campground
- Lakeview Campground

TOURISM SERVICES

- Full range of food and beverage (30+), retail, supply services in Thompson

TRANSPORTATION

- Scheduled air service
- Calm Air international regular service
- VIA Rail passenger service three times per week in each direction (north to Churchill and south to The Pas/Winnipeg)*
- Nexus of Hwy 6, 391 (Lynn Lake) and 280 (Gillam, York Factory)

**Rail disruption to Churchill at time of publication*



COMMUNITY NODAL ASSESSMENT

5.3

THE PAS / OPASKWAYAK CREE NATION**POPULATION:**

The Pas/Opaskwayak Cree Nation – 10,827:

- The Pas – 5,369 (2016),
Opaskwayak Cree Nation – 3,034
- RM of Kelsey – 2,424

Slow decline from 6,390 in 1981

European 51.3%, Indigenous 46.2%;

Median age 34.1 years

Cree origins, migration from prairies

9,000 years ago

Incorporated 1912

ECONOMY:

Forestry, agriculture, commercial fishing, tourism, transportation

University College of the North (two campuses including the main campus)

TAG LINE:

“Gateway to the North”

MOTTO:

Adventure Territory

OTHER:

“A Tourist Paradise”,
“Home of the Trappers’ Festival”



- Operators 12 F/H
- Attractions 12
- Transportation Scheduled Air, Rail, Hwy 6, 10
- Accommodation 188
- Population 10,827 ↓
- Attractors 4
- Services M

ATTRACTORS

(★ denotes Star Attraction)

- Great outdoors – adventure and hunt/fish
- Northern Manitoba Trappers’ Festival (oldest winter fest, since 1948; includes International Sled Dog race) ★
- Clearwater Lake Provincial Park
- Clearwater Lake Yurts

ATTRACTIONS

- The Pas Railway Station
- Charlebois Chape
- Northern Forest Diversification Centre
- Sam Waller Museum ★
- Canadian Kraft Paper tours
- Cranberry Air and Wilderness Outfitters
- Saskeram Wildlife Management Area
- Tom Lamb Wildlife Management Area
- Aseneskak Casino
- White Feather Cree-atons
- The Pas – From the North
- Opaskwayak – White Buffalo Gift Shop

HUNT/FISH

- Tee Pee Outfitters
- True North Outfitters
- Mr T’s Fishing Adventures
- Nitootem Northern Adventures
- Evergreen Resort
- Peterson’s Reed Lake Lodge
- Simon Nabess Wayside Park
- Coyne’s New Vickery Lodge
- Carpenter’s Clearwater Lodge
- Lockhart’s Landing
- Aberdeen Lodge
- M&M Outfitting

ACCOMMODATIONS

- Total rooms – 188
- Wescana Inn
- Anderson Inn and Suites
- Golden Arrow Motel
- Watchee Bay B&B
- Pioneer Bay
- Kikiwak Inn (60)
- Camper’s Cove

- Cormorant Lake Lodge
- Cormorant Community Campground (hwy 287)

TOURISM SERVICES

- Range of food and beverage, retail, supply services in The Pas
- Opaskwayak – Otineka Mall

TOURISM TRANSPORTATION

- Scheduled air services Calm Air, Missinippi Air
- Grace Lake Water Aerodrome
- VIA Rail passenger service Winnipeg/Churchill*
- Paved highway access (Hwy 6, 10)
- On Northern Woods and Waters Touring Route

*Rail disruption to Churchill at time of publication



5.4

FLIN FLON

POPULATION:

5,185 in 2016 census, 4,982 on the Manitoba side of the community

From a high of 11,104 in 1961, population has declined to 5,185 in 2016

Origins European 82.4%; Indigenous 16.5%

Founded 1927 by HBM&S

Name origin from science fiction book

ECONOMY:

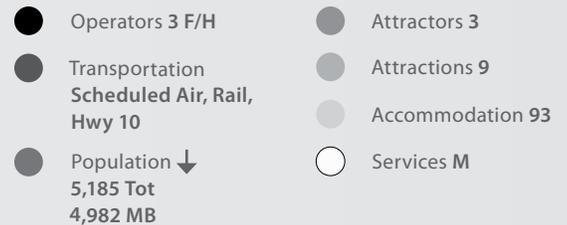
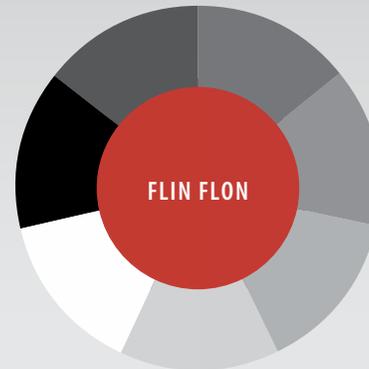
Mining HBM&S – 1,440; education – 137;

hotel Victoria Inn – 57; Retail Canadian Tire – 32

TAG LINE:

“Flinty” town

On Canadian Shield



ATTRACTORS

- Fish/Hunt
- Outdoor adventure
- Grass River Provincial Park

ATTRACTIONS

- Flin Flon Station Museum
- Bakers Narrows Lodge
- Bakers Narrows Provincial Park
- Bakers Narrows Yurts (provincial campground)
- Bakers Narrows Campground
- Wings over Kississing
- Northern Visual Arts Centre (Flin Flon Arts Council)
- Bust the Winter Blues Festival
- Flin Flon Trout Festival
- Northern Rainbows End
- Indian Métis Friendship Centre

HUNT/FISH

- Bakers Narrows Lodge
- Westwood Lodge
- Pistol Lake Outfitters

ACCOMMODATIONS

- Total Rooms – 93
- Bakers Narrows Lodge
- Grass River Provincial Park Campground
- Iskwsum Campground
- Reed Lake Campground

TOURISM SERVICES

- Flin Flon and District Chamber of Commerce

TRANSPORTATION

- Asphalt runway with regular scheduled service
- Railway to Winnipeg and Churchill*
- Road access to Saskatchewan
- Hwy 10 paved

*Rail disruption to Churchill at time of publication



COMMUNITY NODAL ASSESSMENT

5.5

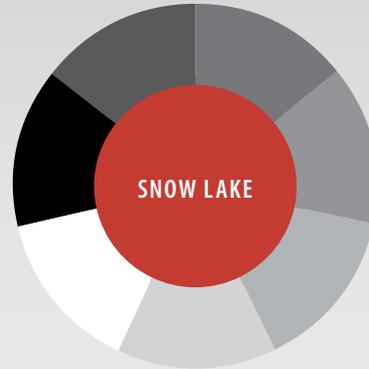
SNOW LAKE

POPULATION:

730 (2006)

ECONOMY:

Mining – Hudbay Minerals; New Britannia closed 2005;
 Founded 1947; Incorporated 1976.



- Operators 5 F/H
- Transportation HWY 392
- Population 730
- Attractors 4
- Attractions 4
- Accommodation 17
- Services L

ATTRACTORS

(denotes Star Attraction)

- Fish/Hunt
- Outdoor adventure
- Wekusko Falls Provincial Park
- Wekusko Falls

ATTRACTIONS

- Gogol Air Service
- Snow Lake Mining Museum
- Snow Lake Murals
- Indigenous pictographs

HUNT/FISH

- Tawow Lodge
- Bear Claw Outfitters
- Wilderness Outfitters
- Wekusko Falls Fishing Lodge
- Burntwood Lake Lodge

ACCOMMODATIONS

- Total Rooms – 17
- Tawow Lodge
- Bluenose B&B

TRANSPORTATION

- Paved highway access
- Limited





5.6

CRANBERRY PORTAGE

POPULATION:

572 in RM of Kelsey (2011)

Populated at least 2,500 years ago

ATTRACTORS

- Fish/Hunt
- Outdoor adventure

ATTRACTIONS

- Cranberry Portage Park
- History – fur trade routes 1763 and onward
- Bombardier Rally (snowmobile)
- Northern Buffalo Art Gallery
- Tipi Flutes

HUNT/FISH

- Elbow Lake Lodge
- Serene Lake Outfitters

ACCOMMODATIONS

- Total rooms – 45
- Neso Lake Adventures
- Viking Lodge
- Northern Spirit Lodge
- Caribou Lodge Outfitters
- Tonapah Lodge
- McKenzie RV Park Campground
- Frontier College (former Mid Canada line base)

TOURISM SERVICES

- Highway services – fuel, food and beverage

TRANSPORTATION

- Paved highway access Hwy 10
- Float plane access
- Rail access to The Pas



COMMUNITY NODAL ASSESSMENT

5.7

GRAND RAPIDS**POPULATION:**

279 (2011); settled in 1877

ATTRACTORS

- Fish/Hunt
- Outdoor adventure

ATTRACTIONS

- History (Fort Bourbon in 1741)
- History – steamboats (1870s); narrow gauge rail (1877) horse drawn to skirt rapids
- Hydro dam flooded rapids
- Grand Rapids bridge take PTH 6 across the river

HUNT/FISH

- Hobbs Resort
- Cooks Campground and Cabins

ACCOMMODATIONS

- Total rooms – 12
- Pine Grove Cabins

TOURISM SERVICES

- Highway services – fuel, food and beverage

TRANSPORTATION

- Paved highway access PTH 6 on Woods and Waters Route

5.8

GILLAM**POPULATION:**

1,281 (2011); 1,909 in 1986, declined to 2001 (1,178) then growth to 2011

ECONOMY:

Manitoba Hydro (three generating stations)

ATTRACTORS

- Fish/Hunt
- Outdoor adventure
- Manitoba Hydro tours: three large hydro-generating stations (Kettle, Long Spruce and Limestone) and two converter stations (Radisson and Henday)
- Nelson River Adventures

ATTRACTIONS

- Nelson River Adventures

HUNT/FISH

- Nelson River Adventures

ACCOMMODATIONS

- Total rooms – 54
- Kettle River Inn
- Nelson Extended Stay and Suites
- ACE Gillam B&B

TOURISM SERVICES

- Basic highway services – fuel, food and beverage

TRANSPORTATION

- Paved highway access Hwy 280
- Rail access to Churchill/Thompson/Winnipeg*

**Rail disruption to Churchill at time of publication*



5.9

LYNN LAKE

POPULATION:

674, declining since mines shut down
Founded in 1950 when Linn Tractors moved buildings previously located in town of Sherridon

ECONOMY:

Not specified; many outfitters serve area

ATTRACTORS

- Fish/Hunt
- Outdoor adventure
- Eskers

ATTRACTIONS

- Lynn Lake Mining Town Museum
- Burge Lake Provincial Park
- Zed Lake Provincial Park

HUNT/FISH

- Lynn Lake Fly-in Outpost Camps
- Laurie River Lodge Limited
- Goldsand Lake Lodge

ACCOMMODATIONS

- Total rooms – 40
- The Bronx
- D&D's Bed & Breakfast
- Lynn Lake Campground

TOURISM SERVICES

- Highway services – fuel, food and beverage

TRANSPORTATION

- Paved highway access Hwy 391 "Life is a Highway" after Tom Cochrane (2016)
- Transwest Air; Bearskin Airlines
- Float Base – Eldon Lake Water Aerodrome
- Airport – over 5,000 ft Lynn Lake Airport



COMMUNITY NODAL ASSESSMENT

5.10

LEAF RAPIDS**POPULATION:**

453 (2011) down from 2,356 (1981)

Planned New Town in 1971; Town Centre Complex was first of its type, won Vincent Massey Award for Urban Excellence

ECONOMY:

Mine closed 2002

ATTRACTORS

- Fish/Hunt

HUNT/FISH

- Churchill River Lodge and Outfitters

ACCOMMODATIONS

- Total rooms – 35

TOURISM SERVICES

- Town of Leaf Rapids

TRANSPORTATION

- Paved highway access Hwy 391
- Air strip, but no scheduled service

5.11

NORWAY HOUSE**POPULATION:**

308 (2011) down 38% since 2006

Norway House 17 was 4,758 in 2011, increase of 16.9% since 2006
Together they are 5,066

ATTRACTORS

- Fish/Hunt
- Outdoor adventure
- Northern fur trade heritage/HBC post

ATTRACTIONS

- Trail of the Wolf Adventures
- Norway House/Rossville Mission
- Treaty and York Boat Days

HUNT/FISH

- Molson Lake Lodge (Indigenous-owned property)

ACCOMMODATIONS

- Total rooms – 39
- York Boat Inn

TOURISM SERVICES

- Various services in community of 5,000 people

TRANSPORTATION

- Paved highway access (Hwy 37)



5.12

COMMUNITY ASSESSMENT SUMMARY

WMC assessed the communities using a scored matrix method. The results speak to the role of specific communities in building regional tourism going forward.

PRIMARY TOURISM NODES

These areas have sufficient tourism infrastructure and attractions to act as hubs or destination areas to support market growth.

- **Churchill Destination Area** – Churchill as the hub community, and the area and operators surrounding it.
- **Thompson Destination Area** – Thompson as the hub community with tourism experiences and operators around it including Lynn Lake, Leaf Rapids and Gillam.
- **Northwest Country Destination Area** – The Pas/OCN, Flin Flon, Snow Lake, Cranberry Portage, supporting tourism activity within the entire area.

TOURISM SERVICE CENTRES

These centres offer minor tourism attraction potential, have potential as “jumping off” points to wilderness adventures, or are strategically located service centres providing for the needs of travellers.

- Lynn Lake
- Leaf Rapids
- Grand Rapids
- Gillam

POTENTIAL FUTURE TOURING ROUTE

In the longer term, can the highway infrastructure from Winnipeg to “Northwest Country” and Thompson be improved to “touring route” status, attracting RV markets and potentially RV rental operations?

- **Highway 6/10** – building on Northern Woods and Waters theme

This is a question which may be addressed in the longer term. In the shorter term of this strategy, improvements to these access roadways can still be completed to improve the visitor experience.

SPECIAL INTEREST ATTRACTORS

These attractions would serve a small, special interest segment of the market prepared to spend significant funds for this visit to heritage resources of Canadian significance.

- York Factory
- Norway House
- Fishing and Hunting Lodges and Outfitters

LONG-TERM GROWTH OPPORTUNITIES

The Eastern area of Manitoba’s North offers significant long-term opportunities for tourism growth. However, the basic infrastructure to support tourism growth appears to be at an early development stage. Some of the exploratory work that may be accomplished includes:

- Better understanding of the natural, cultural, and community factors that would support tourism;
- Initiating conversations with Indigenous peoples of the region concerning their interest in tourism;
- Exploring the potential for road connection of the Island Lake area to Thompson area; and
- Identifying potential nodes for long-term development.

A future tourism area development assessment would be a first step in determining tourism development strategy requirements.

INFRASTRUCTURE MAINTENANCE AND ENHANCEMENT

Tourism relies in a fundamental way on strategic infrastructure. This tourism infrastructure is provided by municipal service providers, Manitoba highway infrastructure, provincial and national parks, airports, rail and by many other utility and service providers.

It is essential to tourism success that the infrastructure in Manitoba’s North be maintained at a high level and enhanced as and where required for this plan to succeed. The Northern Manitoba tourism community needs to provide its voice in support of quality tourism infrastructure and the success of this strategy.

TOURISM SWOT FOR THE NORTHERN MANITOBA REGION

The following SWOT was prepared by tourism stakeholders over the three sessions. From this SWOT, the stakeholders then identified the issues and opportunities that should be the primary focus of their strategy going forward.

- Strengths and Weaknesses (Challenges) are generally considered to be “inside” the region and are matters that can be addressed by the industry.
- Opportunities and Threats are generally considered “outside” the region, driven by a strong market match or by issues that cannot be influenced by regional industry (e.g., low Canadian dollar value).



Values/Principles/Vision
For what do we stand?

Mission/Mandate
Why do we exist?

Operating Environment
Internal and external strengths, weaknesses, opportunities, threats.

Strategic Priorities
What are the 4 to 6 areas that need attention?

Key Results
What do we want to achieve?

Tactics
How do we go about it?

Action and Implementation Plans
Doing it.



STRENGTHS AND OPPORTUNITIES FOR NORTHERN MANITOBA TOURISM

STRENGTHS

Tourism Product and Experiences

- Great Fish/Hunt product, known internationally
- Churchill: Polar bear, world class fish hunt, beluga capital of world
- Recognition of Churchill internationally as a wildlife viewing destination – line expansion to rest of North is possible. (e.g., wolf, sturgeon in Thompson)
- Northern Lights are world class
- Pristine untouched, but accessible wilderness, boreal forest
- Strong provincial (and national) parks, campground product
- Strong festivals in many locations
- Heritage asset strengths – Prince of Wales Fort, Wapusk, York Factory, Norway House, others
- Heritage assets – Mining heritage, museums

Tourism “Place”

- Well-located hub and touring stop communities along paved highways accessing major nodes
- Great supply of lodges accessible to the hubs
- 29 First Nations communities
- Daily air service to several of the hub communities
- Strong provincial parks, campgrounds
- Travel links within the region – air, rail, highway are in place; a multi-modal experience could be created

Tourism Promotion

- New Manitoba marketing funding model (Plan 96/4) allows Travel Manitoba to market
- Marketing system is in place – branding, awareness, promotions; and recognition by government of the importance of tourism

Tourism Hospitality

- Northern hospitality/the people are open and friendly

TOURISM SWOT FOR THE NORTHERN MANITOBA REGION

OPPORTUNITIES**Collective Strategy**

- Regional Strategy – infrastructure, long-term development, address perception issues (diversity, distance, road quality)
- Aligned industry (communities) to address Provincial Government issues and opportunities

Tourism Product and Experiences

- Mandatory student field trips
- Create or enhance Indigenous tourism experiences
- World wide interest in wildlife viewing
- Winter experiences
- More trails/network of trails
- Storytelling – capitalize on uniqueness
- Intercept strategy with Churchill
- Historic tours (York Factory, Norway House)
- Northern Lights
- Ecotourism
- Expand the season (through product)
- Coordinate regional festivals and events

Tourism “Place”

- Improve signage (wayfinding)

Tourism Promotion

- Opportunity to develop a specific Northern marketing/promotion strategy with partners; address short- and long-term marketing initiatives and link initiatives to Travel Manitoba marketing
- Market the North as Canada’s Heartland
- Opportunity to attract boomer segments to region
- Market rubber tire (and RV) to Thompson and the region
- Enhance social media communications

- Promote canoe routes in region
- Create branded marketing bags in Churchill and for Travel Manitoba
- Opportunity to fill capacity of existing operators who have capacity
- Opportunity to build on Canada’s reputation as a safe place to visit for Americans and other countries as well; Australia looking to Canada instead of the United States

Tourism Hospitality

- Be better ambassadors
- Implement training and education

Tourism Organization

- Build capacity with other organizations and sister cities; grow demand for the region
- Improve operator collaboration
- Engage public, industry in support of tourism growth in the region
- Address the value and benefits of new Destination Marketing Organizations within the region
- Opportunity to advance and grow, working more closely with Travel Manitoba and others to create a clear definition, functions and accountabilities for the regional tourism role

Capitalize on Opportunity

- Economic changes are happening – necessity is mother of invention
- Demographic change (boomer, gen Y, Liberal \$)
- Opportunity to engage Indigenous communities in presenting the distinct practices – but also petroglyphs, snake pits, The Pas area clean water – and other unique aspects that can be interpreted through Indigenous partners
- Need to engage original land owners (Indigenous peoples) in developing tourism

CHALLENGES AND THREATS FOR NORTHERN MANITOBA TOURISM

CHALLENGES (WEAKNESSES)

- Not ready to host company consistently
- Not consistently capitalizing on opportunities to sell/create positive impressions (closed on Sundays)
- Lack of local government support (not just provincial)
- Fragmentation of the region
- North is very BIG – almost need sub-regions within it
- Need to market areas within the region, not the whole region – precludes involvement of owner/operators because it is so big
- Operators do not ALWAYS work well together – Internal expansion issues with local government as well as outside

Attitude

- Poor attitude, lack of pride
- Combating street vagrancy
- Apathy, little community buy-in
- Lack of appreciation of tourism as economic generator by locals, government officials. Need to expand effort to get communities to understand and demonstrate the value of tourism
- Lack of operator engagement
- Lack of Indigenous community engagement

Tools

- Lack knowledgeable guides and ambassadors (Blue Badge)
- Lack of proactive CRM (customer relationship management) for follow-up
- Communication infrastructure is weak
- Checklist for points of entry

THREATS (EXTERNAL TO REGION)

- Cost of travel to North could be addressed
- Economic conditions impacting travel
- Environmental conditions impacting travel (road, rail, weather)
- Capacity issue – if the region had more places to stay it could handle more – but infrastructure limits capacity
- Red tape and bureaucratic obstacles exist in multiple domains; lobbying is needed to reduce the red tape
- Wildlife accessibility and sustainability

In Provincial Domain

- Private accommodation rentals undermine tourism product; it also doesn't show revenue back to marketing
- Hunting challenges:
 - Moose, caribou issues with increasing hunt/tag
 - Lots of lodges – some are closing
 - Social pressure to move to ecotourism – issues there
 - Hydro adds pressure to the North – for hunting
 - Therefore, expansion of hunting can't be the answer in the North
 - Fishing situation is better, but two are intertwined in terms of operators – private capital often comes from OUTSIDE – so benefits sometimes flow out to outside capital as well
 - Transportation infrastructure (cost, availability, consistency, fuel cost)
 - Lack of support for small business and entrepreneurs
 - Definition of roles and responsibilities (public, private, region)
 - Lack of training for front line
 - Lack of resources and continuity in long-term strategy
 - Lack of government leadership and commitment
 - Government in the lead, not private sector
 - Lack of whole of government commitment (all departments) to long-term strategy for industry and tourism destination development in the North

TOURISM SWOT FOR THE NORTHERN MANITOBA REGION

6.3

HIGH PRIORITY ISSUES AND OPPORTUNITIES TO ACT ON: 2017-2022

Based on the SWOT, industry stakeholders identified the following issue areas as those for priority focus in the strategy between 2017 and 2022.

PRIORITY STRATEGIC ISSUES**Product**

- Develop and market experiences in identified destination areas, service centres, and special interest attractors
- Need more product/attractions to support some of our core products – e.g. Indigenous tourism product
- Wildlife accessibility and sustainability (e.g. Polar bears, belugas, fishing, hunting)

Price

- Accessibility: consistent reasonable cost of transportation to the region needs to be addressed

Promotion

- Increase marketing of existing product, increase (and resource) the marketing, packaging, etc.
- There is limited market-ready product, so a product enhancement and development focus needs to occur

Infrastructure

- Road, rail, and air upgrades are required

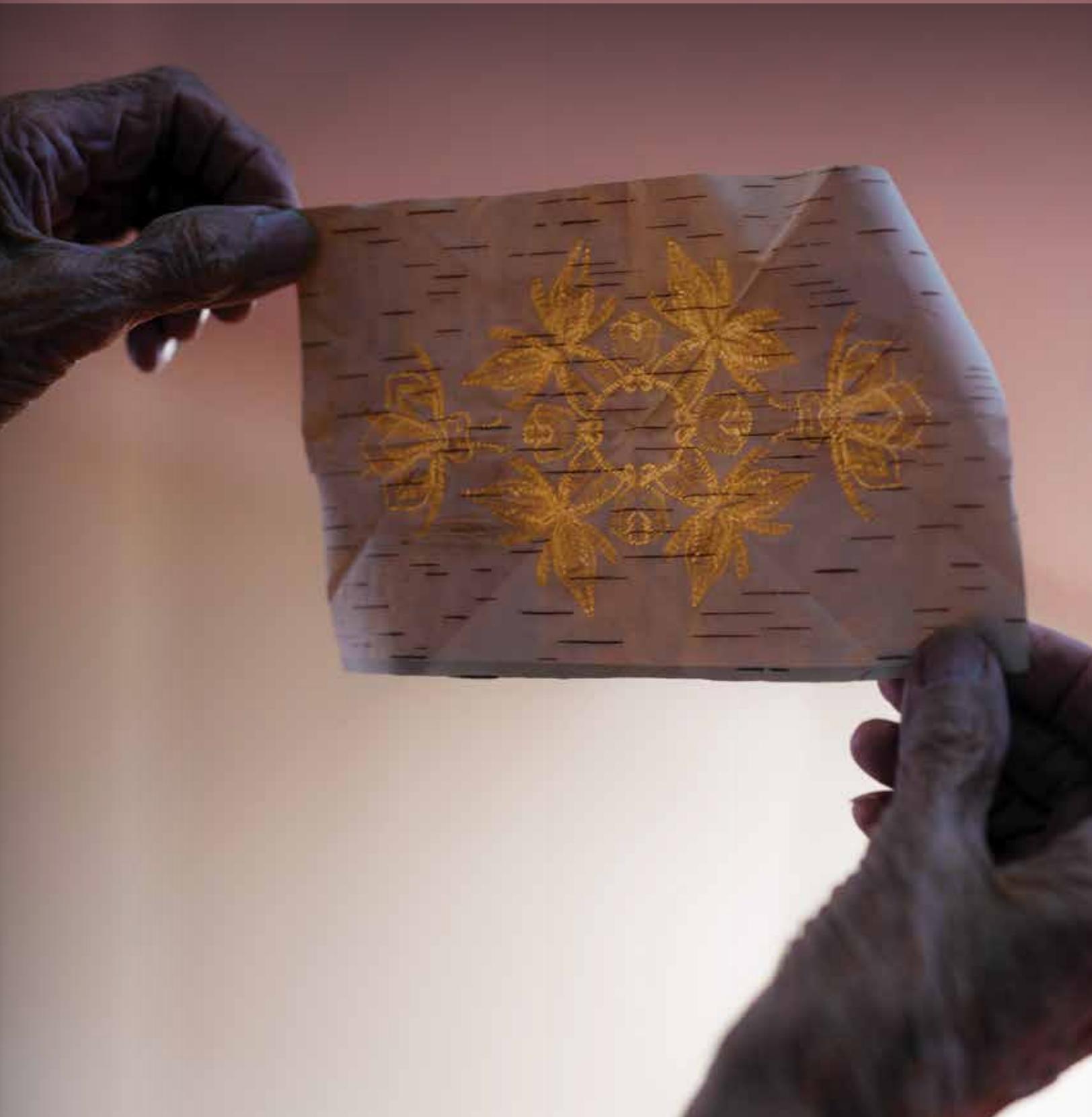
Tourism Organization

- No real champion for tourism as the industry that can front a culture shift in the Northern economy
- Challenge of attracting local entrepreneurs to the tourism business landscape
- Red tape and bureaucracy issues need to be addressed – in many areas, such as product development, training etc.
- More operator input in the development of strategy and tactics – more Northern collaboration
- Establish community support for tourism

PRIORITY STRATEGIC OPPORTUNITIES

- Create interest in entrepreneurial opportunities in tourism as an option. Start at a young age, perhaps in high schools
- Increase Indigenous community participation, input, and support
- Identify role for the regional tourism function in collaboration with Travel Manitoba, Government of Manitoba
- Boomer market opportunity – opportunity to attract summer snowbirds to Manitoba by bringing product up to quality level to compete in this market
- Build on successes of other regions; research other successes and apply winning approaches
- Celebrate our own tourism successes; e.g. the Thompson Hotel Tax will be used to market Thompson – a tourism success
- Align communities, operators to lobby for more support for tourism from outside organizations and government
- Opportunity to estimate the economic impact of tourism in the North to get idea of what tourism jobs are worth
- Opportunity to INTRODUCE the North to Winnipeg as a target market
- Opportunity to grow Indigenous and experiential tourism together; grow the components of tourism

STRATEGIC PRIORITIES AND KEY RESULTS



STRATEGIC PRIORITIES AND KEY RESULTS

7.1

DEFINITIONS AND MEANING

Strategic Priorities focus the finite energy and resources of the region on those priorities that are most critical to success. They are usually longer term. They not only specify the major areas of collective focus; they also, by implication, suggest that efforts be dropped in certain other areas that are not a priority. A region cannot be all things to all people, and it cannot afford to grow everywhere at once.

Strategic Priorities are **not** listed in order of priority. Rather they represent each of the areas in which the region must focus energies in order to succeed. The region must address ALL the strategic priorities to succeed. The stakeholders addressed five Strategic Priorities in the strategy.

Key Results are statements of the **specific outcomes** that an organization (or a region) wishes to achieve relative to a strategic priority. They represent **what the region wants to accomplish** and are written in specific enough terms to be measurable. They are usually shorter term.

One way to envision Key Results is to think about what **outcome** one wishes to achieve within a specific period of time.

The Key Results that follow for each priority were developed by stakeholders. These Key Results are the major outcomes that will be accomplished within the period of the strategy. There are 19 Key Results across five Strategic Priorities.

7.2

STRATEGIC PRIORITIES AND KEY RESULTS: 2017-2022

The Manitoba North stakeholders developed the following Strategic Priorities and Key Results for the period 2017-2022.

STRATEGIC PRIORITY #1:

ORGANIZATION AND COMMUNICATIONS:

Regional tourism roles in Manitoba's North are clarified; regional efforts leverage industry, investor, and community support.

Key Result 1.1: Reconsider the structure, accountability, and funding of Tourism North and pilot a more effective regional model for the North by October 2017.

Key Result 1.2: Northern communities embrace tourism, understand and prioritize tourism issues, and advocate for change with strategically targeted organizations and governments by December 2019.

Key Result 1.3: Tangible Industry and community support for tourism development and marketing within tourism destination areas is in place by March 2019 and thereafter.

Key Result 1.4: Northerners are more positive about tourism as a sector by March 2022.

STRATEGIC PRIORITY #2:

TOURISM MARKETING:

Collaborative destination area marketing, led by Travel Manitoba, creates regional awareness and leverages market-ready products to increase visitation to Manitoba's North.

Key Result 2.1: Awareness and positioning of Northern Manitoba within Travel Manitoba marketing plans is revised to align with Northern Strategy by June 2018.

Key Result 2.2: Collaborative marketing strategies, leveraging industry and community investment and new product developments, are prepared and executed for Northern destination areas by June 2018.



STRATEGIC PRIORITY #3:

TOURISM PRODUCT AND EXPERIENCE DEVELOPMENT:

Enhancements to tourism hub communities and to existing tourism experiences, and the creation of new market-ready tourism experiences, grows tourism in Northern Manitoba.

Key Result 3.1: Destination Area Tourism Plans are established in the Churchill, Thompson, and Northwest Country destination areas by March 2019.

Key Result 3.2: Northern tourism operators are accessing high quality employee training and education in tourism/hospitality by December 2018 and thereafter.

Key Result 3.3: Tourism entrepreneurs develop market-ready product in Northern destination areas, creating increased visitation by December 2019 and thereafter.

Key Result 3.4: Indigenous tourism experiences are established in priority destination areas by March 2021 and thereafter.

Key Result 3.5: Development and marketing strategies are in place for Norway House and York Factory as Special Interest Destinations by March 2019.

Key Result 3.6: Tourism products and services that help to extend the tourism season in destination areas are in place by March 2022 and thereafter.

STRATEGIC PRIORITY #4:

INFRASTRUCTURE ENHANCEMENT AND DEVELOPMENT:

Infrastructure is improved to enhance the visitor experience.

Key Result 4.1: Air, road, and rail infrastructure is enhanced and maintained in support of a quality tourism experience in Manitoba's North.

Key Result 4.2: Tourism signing in specific destination areas enhances the visitor experience by March 2022.

Key Result 4.3: En-route and in-destination service centres provide an improved quality visitor experience by March 2022.

Key Result 4.4: Digital infrastructure is readily accessible to visitors and operators across Manitoba's North by March 2020.

STRATEGIC PRIORITY #5:

POLICY AND REGULATION:

Ensure that the regulatory environments (federal, Indigenous, provincial, municipal) are more conducive to tourism business success.

Key Result 5.1: Government of Manitoba conducts a regulatory review and consultation regarding provincial government regulations that affect tourism in Northern Manitoba, and streamlines regulation by March 2019.

Key Result 5.2: Training and education initiatives identified in the Northern Tourism Strategy are implemented by Government of Manitoba by March 2019.

STRATEGIES/TACTICS

Strategies (and the more detailed strategies that can be called Tactics) represent the **what** of strategy. They refer to what we are going to do to accomplish the outcome we have set for ourselves as the target when we agree on the Key Results.



WMC drafted tactical plans at a high level for each Key Result. These plans were reviewed by stakeholders and were revised with the Travel Manitoba team. Participants in the session on April 10 then ascribed lead roles to the Key Results. These lead roles have been assigned to all tactics in the table following. These tactical plans have been detailed with responsibilities, timelines, and funding sources. In particular, the lead role in completing each task will be identified and the organization taking on that **lead** role will be committed to that responsibility.

The table following addresses the meaning of the terms used in the subsequent tables. Capital letters assign a lead role, where lower case letters apply to a support role.

LEAD ROLES: LEGEND

PROV (prov)	Province of Manitoba
TMB (tmb)	Travel Manitoba
AC (ac)	Advisory Committee – in lieu of using “Tourism North”, given that Key Result 1.1 anticipates piloting a new approach, the term Advisory Committee has been used to mean an interim regional advisory committee for Manitoba’s North.
DA (da)	Destination area industry or committee
MTEC (mtec)	Manitoba Tourism Education Council
UCN (ucn)	University College of the North
EN (en)	Entrepreneurs
IEN (ien)	Indigenous entrepreneurs
Community	Communities in Manitoba’s North
MUN (mun)	Municipal Governments
Community Leadership	Leaders of individual communities
BDC	Business Development Corporation
CFDC	Community Futures Development Corporation
PC (pc)	Parks Canada
OP (op)	Operators
OW (ow)	Owners of tourism businesses

STRATEGIES/TACTICS

8.1

**STRATEGIC PRIORITY #1:
ORGANIZATION AND COMMUNICATIONS**

Regional tourism roles in Manitoba's North are clarified; regional efforts leverage industry, investor, and community support.

KEY RESULT 1.1:

Reconsider the structure, accountability and funding of Tourism North and pilot a more effective regional model for the North by October 2017.

Strategies/Tactics	LEAD
1 Stakeholders agree on the role of Tourism North and Travel Manitoba. Travel Manitoba leads a pilot to test an alternative business model to the current Regional Tourism Association model aimed at improving the effectiveness of investments in marketing and developing tourism in the North.	TMB / ac
2 Decisions on relationship between TMB and regional functions are finalized and communicated; TMB determines how it will operate at the regional level.	TMB / ac
3 Define and communicate roles and accountabilities of key regional stakeholders.	TMB / ac
4 Execute reorganized delivery approach.	TMB / ac
5 Monitor, review, and adjust as required.	TMB / ac

KEY RESULT 1.2:

Northern communities embrace tourism, understand and prioritize tourism issues, and advocate for change with strategically targeted organizations and governments by December 2019.

Strategies/Tactics	LEAD
1 Destination area plans are completed, bringing key regional issues to the table.	AC / tmb
2 Key tourism issues that require government support are prioritized.	AC / tmb
3 Develop plans for communicating and advocating on key issues particularly the value of tourism to the Northern economy.	AC / tmb
4 Request meetings with government to address key issues.	AC / tmb
5 Monitor progress; adjust approach as required.	AC / tmb



KEY RESULT 1.3:

Industry and community support for tourism development and marketing within tourism destination areas is in place by March 2019 and thereafter.

Strategies/Tactics	LEAD
1 Communications strategy targeting Council, Chambers of Commerce, and leading community organizations is prepared for local industry leaders to present. The Strategy is presented as the blueprint for the region.	TMB
2 Communications plans targeting public support are prepared. Communications plans targeting industry organization and support are prepared. Detailed plans are prepared for each destination area in the strategy. Establish key performance indicators.	TMB
3 Tourism industry operators are invited and encouraged to participate in planning and execution of key steps in the destination area strategy.	TMB
4 Leaders present the tourism case to Councils, Chambers, community leaders, tourism industry, and the public.	TMB
5 Measure and monitor results.	TMB

KEY RESULT 1.4:

Northerners are more positive about tourism as a sector by March 2022.

Strategies/Tactics	LEAD
1 Research role of tourism in each destination area and the North as a whole; dollars, jobs, taxes, cultural benefits. Benchmark Northern attitudes to tourism.	AC / tmb
2 Document positive impacts of the Strategy – community support, industry support, new developments, markets, etc. Celebrate successes.	AC / tmb
3 Measure Northerner attitudes to tourism and compare to benchmark levels.	AC / tmb
4 Promote increased support across the region and to Manitoba decision-makers.	AC / tmb

STRATEGIES/TACTICS

8.2

**STRATEGIC PRIORITY #2:
TOURISM MARKETING**

Collaborative destination area marketing, led by Travel Manitoba, creates regional awareness and leverages market-ready products to increase visitation to Manitoba's North.

KEY RESULT 2.1:

Awareness and positioning of Northern Manitoba within Travel Manitoba marketing plans is revised to align with Northern Strategy by June 2018.

Strategies/Tactics	LEAD
1 Determine revised positioning for each destination area within the Manitoba marketing approach.	TMB
2 Align Northern regional positioning with Travel Manitoba's brand and work collaboratively with Travel Manitoba to promote the main offerings of the key destination areas.	TMB
3 Ensure local industry is supportive of revised approach in each destination area.	TMB
4 Review alignment in TMB Strategy on a regular basis; adjust as necessary.	TMB

KEY RESULT 2.2:

Collaborative marketing strategies, leveraging industry and community investment and new product developments, are prepared and executed for Northern destination areas by June 2018.

Strategies/Tactics	LEAD
1 Research market-ready product and market offerings (individual marketing, packaging) in each destination area; determine operator interest in collaboration, and work with operators.	TMB / AC
2 Prepare strategic marketing plans for each destination area; structure collaborative marketing opportunities for industry participation within the plans.	AC / tmb
3 Align destination area strategy with provincial approach.	AC / TMB
4 Execute marketing plans in conjunction with leading operators.	AC / TMB
5 Measure results; adjust promotion approaches as required.	AC / TMB
6 Revisit and adjust destination area marketing plans in conjunction with industry annually.	AC / TMB

8.3

STRATEGIC PRIORITY #3: TOURISM PRODUCT AND EXPERIENCE DEVELOPMENT

Enhancements to tourism hub communities and to existing tourism experiences, and the creation of new market-ready tourism experiences, grows tourism in Northern Manitoba.

KEY RESULT 3.1:

Awareness and positioning of Northern Manitoba within Travel Manitoba marketing plans is revised to align with Northern Strategy by March 2018.

Strategies/Tactics	LEAD
1 Conduct a Destination Area Tourism assessment for Churchill Destination Area.	DA / AC / TMB
2 Conduct Destination Area Tourism assessment for Northwest Country Destination Area.	DA / AC / TMB
3 Conduct Destination Area Tourism assessment for Thompson Destination Area.	DA / AC / TMB
4 Develop execution plans for each strategic initiative.	DA / AC / TMB
5 Establish review metrics and process; review and revise plans on a regular basis.	DA / AC / TMB

KEY RESULT 3.2:

Collaborative marketing strategies, leveraging industry and community investment and new product developments, are prepared and executed for Northern destination areas by March 2018.

Strategies/Tactics	LEAD
1 Identify training and education issues in Northern Manitoba; identify change required.	AC / MTEC / PROV / TMB
2 Work with MTEC/Tourism HR Canada to ensure training programs are accessible in destination areas.	TMB/ MTEC / UCN
3 Research funding programs that would offset cost of tourism training for Northerners.	TMB / MTEC / UCN
4 Promote programs through region tourism network within destination areas.	TMB / MTEC / UCN
5 Execute programs through partners (MTEC, Tourism HR Canada, emerit.ca etc.).	TMB / MTEC / UCN
6 Research tourism education programs and options (local, online) available to Northerners, both existing and rumored.	TMB / MTEC / UCN
7 Connect Northern tourism operators with education options available to business owners and staff.	TMB / MTEC / UCN
8 Measure results, satisfaction, application of program learning.	MTEC / UCN
9 Promote success of operators who have taken the programs to build further interest.	MTEC / UCN

STRATEGIES/TACTICS

KEY RESULT 3.3:

Tourism entrepreneurs develop market-ready product in Northern destination areas, creating increased visitation by December 2019 and thereafter.

Strategies/Tactics	LEAD
1 Identify opportunities to enhance existing product to market-ready standards in each destination area; identify gaps in service and opportunities for business starts in gap areas.	AC / EN / TMB
2 Leverage existing programs to support entrepreneurial starts in tourism sector. Communicate available programs to industry, working through existing networks such as Manitoba Lodges and Outfitters Association (MLOA).	AC / TMB
3 Support business starts with collaborative marketing opportunities, collateral material etc.	AC / EN / TMB
4 Measure new business starts in each destination area; new business, jobs, visitors etc.	AC / TMB
5 Review and revise approach on a regular basis.	TMB

KEY RESULT 3.4:

Indigenous tourism experiences are established in priority destination areas by March 2021 and thereafter.

Strategies/Tactics	LEAD
1 Approach Indigenous communities in Northern Manitoba to address opportunity and to understand interest level and preferred approaches.	TMB / ATAC / IEN / Community / BDC / CFDC / PC
2 Identify the type of opportunities in each destination area based on the plans for those areas. Identify potential Indigenous cultural tourism opportunities as well as mainstream tourism opportunities.	ATAC / IEN / AC / TMB
3 Research Federal and Provincial programs supporting Indigenous entrepreneurship and summarize from a tourism perspective.	TMB / ATAC
4 Assist Indigenous tourism entrepreneurs by leveraging organizations that provide specific support – business planning, capital investment, marketing support etc.	ATAC / AC / TMB
5 Assist new business to work with destination area partners to maximize opportunity.	ATAC / AC / EN
6 Measure start-ups and activities and celebrate successes in each destination area.	ATAC / AC



KEY RESULT 3.5:

Development and marketing strategies are in place for Norway House, York Factory and fishing and hunting lodges/outfitters as Special Interest Destinations by March 2019.

Strategies/Tactics	LEAD
1 Work with Parks Canada and operators to develop a compelling product supporting regular special interest tours of York Factory.	TMB / Community / Leadership / PC
2 Promote York Factory tours to target segments for this experience.	TMB
3 Work with Norway House community/FN, Provincial Historic Resources Branch, and operators to assess the potential and conceive the product for Norway House and Rossville Mission as heritage interest destinations.	PC / AC / TMB
4 Work with local Indigenous entrepreneur(s) to develop the packages/product if there is interest.	AC / PC / TMB
5 Provide partnered marketing support for the new product.	TMB
6 Measure results; adjust as required.	PC / TMB

KEY RESULT 3.6:

Tourism products and services that help to extend the tourism season in destination areas are in place by March 2022 and thereafter.

Strategies/Tactics	LEAD
1 Research and identify tourism experience opportunities through destination area plans and in other areas of the North: wildlife viewing experiences; multi-modal packaging opportunities; industrial tour potential; and products to create year-round experiences within destinations that are of interest.	Operators / Owners / EN / TMB
2 Communicate opportunities to existing tourism industry operators, to Northerners, and to entrepreneurs accessible through Travel Manitoba contacts.	TMB
3 Support opportunity development by leveraging program support from agencies	EN / TMB
4 Work with operators to ensure start-up marketing leverages the programs available through TMB and others.	TMB
5 Review business performance on a regular basis; celebrate successes.	TMB

STRATEGIES/TACTICS

8.4

**STRATEGIC PRIORITY #4:
INFRASTRUCTURE ENHANCEMENT AND DEVELOPMENT**

Infrastructure is improved to enhance the visitor experience.

KEY RESULT 4.1:

Strategic air, road and rail infrastructure is enhanced and maintained in support of a quality tourism experience in Manitoba's North.

Strategies/Tactics	LEAD
1 Conduct a high-level assessment of air, road and rail services and identify gaps and issues from a tourism perspective. Present results to federal, provincial and municipal governments to seek investment.	TMB / Leaders in Northern Economic Sectors / PROV
2 Advocate for enhancement and high maintenance of air, road and rail assets to provide a quality tourism experience.	TMB
3 Monitor results and recognized improvements.	TMB / PROV

KEY RESULT 4.2:

Tourism signage in specific destination areas enhances the visitor experience by March 2022.

Strategies/Tactics	LEAD
1 Assess signage situation and opportunities en-route and within destination areas in the North; identify and prioritize issues.	TMB / AC / Mun / Prov
2 Work with Manitoba Department of Highways to design or adopt signage standards for tourism signage for application in the North. Pursue bilingual signage – English and Indigenous (Cree, Dene).	AC / Mun / Prov
3 Create signage program for operators to purchase within destination areas.	AC / Mun / Prov
4 Address potential for regionally themed signing from a branding and wayfinding perspective.	TMB / Mun / Prov
5 Launch signage program if appropriate.	TMB / Mun / Prov
6 Measure results; refocus as needed.	TMB / Mun / Prov



KEY RESULT 4.3:

En-route and in-destination service centres provide an improved quality visitor experience by March 2022.

Strategies/Tactics	LEAD
1 Review and assess service centres (gas stations, information centres, rest areas, convenience retail) for quality in relation to tourism/hospitality.	TMB
2 Provide advice and recommendations for improvement to selected service centres.	TMB
3 Leverage support programs to assist operators with upgrades.	TMB
4 Review results; adjust approach as required.	TMB

KEY RESULT 4.4:

Digital infrastructure is readily accessible to visitors and operators across Manitoba's North by March 2020.

Strategies/Tactics	LEAD
1 Advocate for a comprehensive assessment (or review) of digital services capacity and provision in Manitoba's North.	Industry / Prov / MKO / TMB
2 Advocate for upgraded services if needed.	TMB / Prov
3 Support upgrades with recognition and communication to industry	TMB



STRATEGIES/TACTICS

8.5

**STRATEGIC PRIORITY #5:
POLICY AND REGULATION**

Ensure that the regulatory environments (federal, Indigenous, provincial, municipal) are more conducive to tourism business success.

KEY RESULT 5.1:

Government of Manitoba conducts a regulatory review and consultation regarding provincial government regulations that affect tourism in Northern Manitoba, and streamlines regulation by March 2019.

Strategies/Tactics	LEAD
1 Ensure key regulatory issues are identified during the Northern Economic Development consultation process.	TMB
2 Work with Destination Area Leadership and other organizations (MLOA) to identify and prioritize key issues with red tape affecting tourism. Identify major issue areas and request government review.	AC / TMB
3 Conduct research on specific key issues to understand all perspectives.	TMB / AC
4 Develop advocacy approach to address key issues.	AC
5 Participate in Government review process; support and promote the review and changes at the community level.	AC / TMB
6 Request meeting with government to advocate for regulation review and change.	AC
7 Request whole-of-government support for major planning documents.	AC
8 Monitor, evaluate, adjust as required.	TMB

KEY RESULT 5.2:

Training and education initiatives identified in the Northern Tourism Strategy are implemented by Government of Manitoba by March 2019.

Strategies/Tactics	LEAD
1 Advocate for change at the appropriate levels.	AC
2 Monitor results; adjust approach as needed.	AC

IMPLEMENTATION



While implementation activity will occur intensively within the five-year period of the strategy, many implementation strategies and tactics are ongoing.

Strategy should be reviewed annually and updated as required. If major changes in the strategic assumptions occur and impact the SWOT, it may be time to review the strategy.

And finally, as major milestones in the strategy are met and as outcomes are achieved, Manitoba's Northern stakeholders should celebrate these successes.

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