MANITOBA TOURISM INDUSTRY'S Road to Recovery
Despite the pandemic setback, our baseline forecast has tourism spending growing by 51% from 2019 to 2030.

### Manitoba Visitor Spending Forecast

<table>
<thead>
<tr>
<th>Year</th>
<th>Upside Scenario</th>
<th>Baseline Scenario</th>
<th>Downside Scenario</th>
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Sources: StatCan; Tourism Economics
Room revenue may not recover until 2025

Manitoba Hotel Occupancy: Jan 2020 – Feb 2021
Source: STR

Hotel Room Revenue in Canada - Forecast
Index (corresponding month in 2019 = 100)

Still 22% below 2019 levels in March 2022
MANITOBA TOURISM STRATEGY

• New strategy recognizes far-reaching impacts of pandemic

• Provides leadership to ensure tourism sector recovers as quickly as possible

• Considers industry insights and tourism industry trends
MANITOBA TOURISM STRATEGY STAKEHOLDER INSIGHTS

- Urban/rural divide
- Restoring consumer confidence
- Relying on strong provincial brand and success of Place Brand program to maximize tourism potential
RESTORING CONSUMER CONFIDENCE

- MTEC’s Clean it Right
  - Free cleaning enhancement training program
- Other organizational programs to promote customer safety
- Provide this information to customers
  - On your website, social media
  - Update your listings on TravelManitoba.com
INDUSTRY TRENDS

• Digital marketing and e-commerce
• Travellers seek transformational experiences
• Health and safety are essential
• Money back guarantee and discounts can drive bookings
• Events are rethinking business models and success factors
• Destination leaders have a greater involvement in advocacy
• Stronger focus on industry/government collaboration and organizational alignment
NEW TARGETS

• Recover to 2019 levels by 2024

• Generate 50% growth in visitor spending by 2030
2021 MARKET FOCUS

• Marketing will depend on current public health orders and travel restrictions

• Markets
  • Manitoba
    • Winnipegers travelling outside the city
    • Rural Manitobans travelling to Winnipeg
  • Saskatchewan and Northwest Ontario, if/when possible
2021 MARKETING OBJECTIVES

• Build on *Home is where the heart is*

• Increase awareness with Manitobans of destinations throughout the province accessible by road
  
  • Promotion of 18 road trip itineraries throughout the province

• Provide information and tools to Manitobans to travel throughout the province

• Drive leads to partners
Thank You