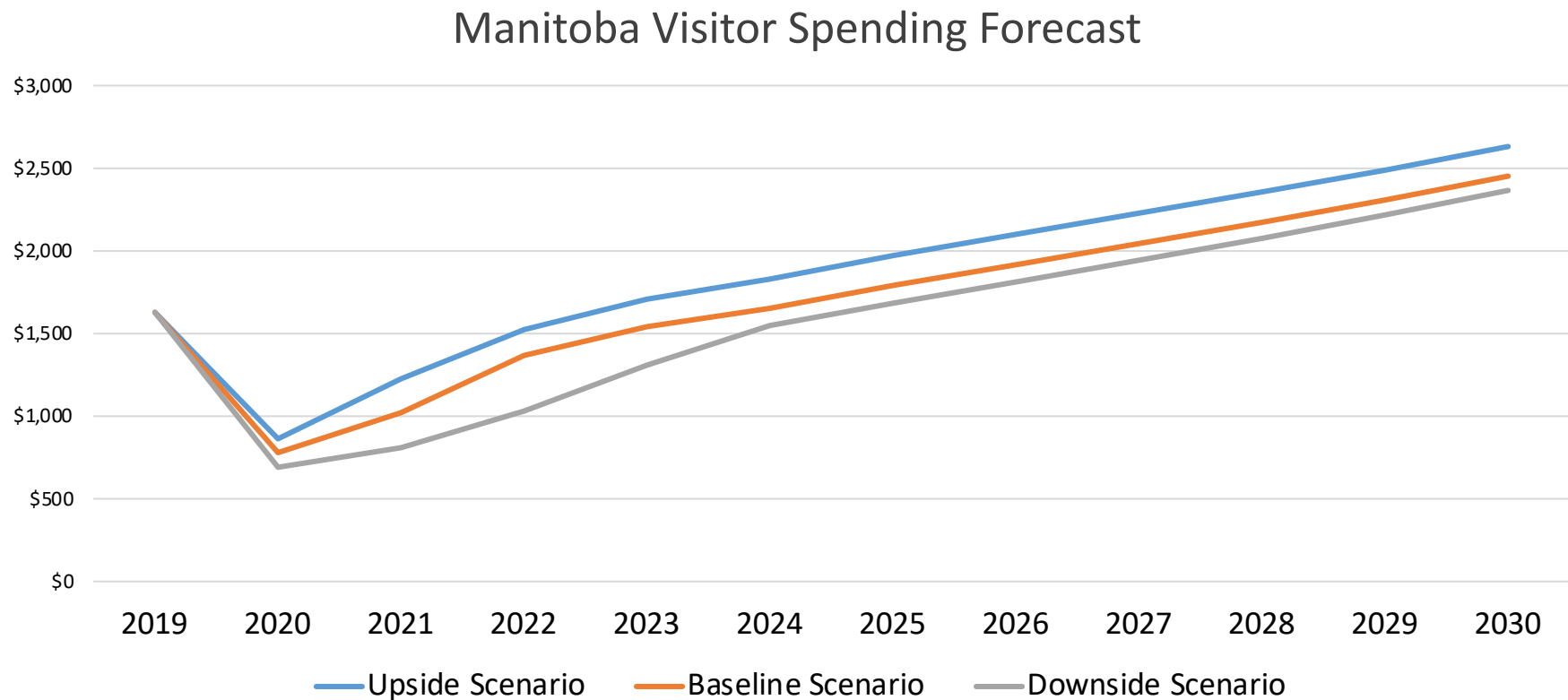


MANITOBA TOURISM INDUSTRY'S Road to Recovery



MANITOBA'S VISITOR ECONOMY

Despite the pandemic setback, our baseline forecast has tourism spending growing by 51% from 2019 to 2030.



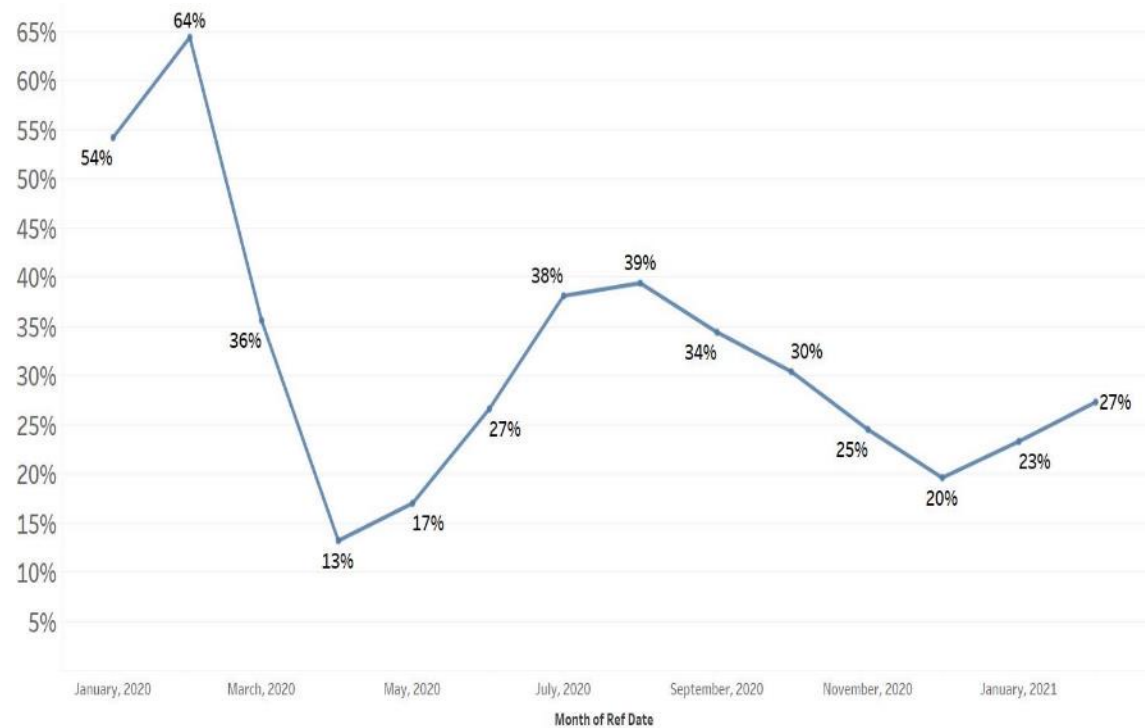
Sources: StatCan; Tourism Economics

MANITOBA'S HOTEL SECTOR

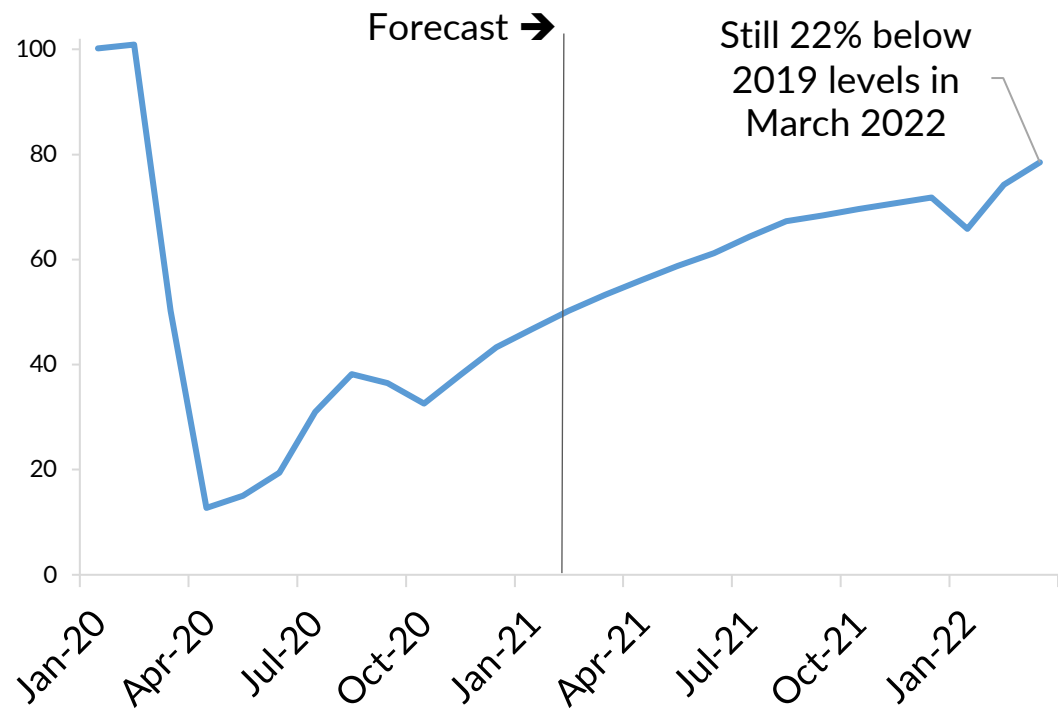
Room revenue may not recover until 2025

Manitoba Hotel Occupancy: Jan 2020 – Feb 2021

Source: STR



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



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](https://www.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
 - Winnipeggers 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

