

PACKAGING THE POTENTIAL

Sharing Manitoba's Culture with the World



*...a collaborative
approach to
maximize the
potential of
cultural and
heritage tourism*

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Sharing Manitoba's Culture with the World

*A collaborative approach to maximize
the potential of cultural and heritage tourism*

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Sharing Manitoba's Culture with the World

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Foreword

“Cultural tourism is growing at a rate of 15% each year and Manitoba’s products are well-suited to attracting culture enthusiasts. By creating a plan to pursue this market, we’ve taken a giant and essential first step in achieving the potential this market offers.”

*Sandra Hardy, Deputy Minister,
Manitoba Culture, Heritage and Tourism*

Through a series of consultations and forums that allowed interaction between the tourism industry and the culture and heritage sector, a culture and heritage tourism strategy was recently developed by Manitoba Culture, Heritage and Tourism.

This Department has approved a six-point strategy (August 5, 2003) aimed at maximizing the potential of culture and heritage tourism and has begun implementation of the strategy.

On November 5, 2003, 102 representatives from the tourism and culture and heritage sectors attended “Meet, Learn Grow”, an event designed to unveil the strategy and outline opportunities for partnering.

As well, a new innovative marketing initiative that featured market-ready cultural experiences was conducted in the fall of 2003.

This province-wide initiative is the first ever developed in Manitoba for the culture and heritage sector and is a solid example of key recommendations contained in *Packaging the Potential*¹, the Canadian Tourism Commission’s business strategy in heritage and cultural tourism:

- to create formal linkages between the heritage, culture and tourism sector and
- to integrate cultural and heritage tourism experiences as a key product line.

The report outlines the opportunities, challenges and approach associated with engaging the industry, soliciting input and ultimately authoring a plan that would advance the groundswell of interest in this sector and deliver tangible economic results.

We are pleased to share the detailed description of this project and of its various steps with the tourism industry, the culture and heritage community and with other jurisdictions.

¹ The strategy is available at www.canadatourism.com.

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*** Please note: For the comprehensive text of the strategy and the following two documents that summarize the consultation process, please contact Lilian Tankard at (204) 945-1522 or send an e-mail to ltankard@gov.mb.ca.

*Tourism Forum – Report of the Forum, February 2001
Building on our strengths. Planning for tomorrow.*

*Tourism Forum – Summary of Proceedings, November 27, 2002
Culture and Heritage. Share the Experience.*

Introduction and Background

“The sheer volume of travelers interested in arts and history as well as their spending habits, their travel patterns and demographics leaves no doubt that history and culture are now a significant part of the U.S. travel experience.”

*William S. Norman, President and CEO
Travel Industry Association of America.*

The journey towards developing an integrated province-wide plan dedicated to furthering culture and heritage-based tourism began with research. Local, national and international sources were tapped to provide a solid base from which to begin. One of the first resources identified was the Canadian Tourism Commission’s (CTC) “Packaging the Potential: A Five-Year Business Strategy for Cultural and Heritage Tourism in Canada.”

The CTC strategy states that there is culture and heritage tourism occurring when participation in a cultural or heritage activity is a significant factor for traveling. Fuelled by a growing population of aging, educated and affluent baby boomers, visitors are increasingly seeking experiences that complement a desire to enjoy an authentic destination and a sense of personal enrichment. This form of tourism is motivated by an interest in other people, other places and other cultures.

Manitoba shares this definition and has included the following product categories in the development of its strategy:

- Performing arts
- Visual arts and crafts
- Museums and cultural centers
- Historic sites, villages and interpretive centers
- Festivals

These identified products also have links to Aboriginal tourism, language-learning tourism (ESL-FSL) and culinary experiences but do not include natural heritage experiences, sports or adventure. In total, Manitoba’s culture and heritage product consists of well over 200 individual attractions with 21 of them at the market-ready or near market-ready stages. Its products appear to be well matched to the growing trend that sees increasing numbers of tourists seeking a culture and heritage experience.

The Travel Industry Association of America (TIAA) also identified this as a profitable market, citing two-thirds of all adult U.S. travelers as having participated in cultural tourism in recent years. In Canada, interest in culture and heritage is also strong with total domestic spending by Canadian cultural tourists exceeding \$3 billion, according to TAMS, the CTC’s Travel Activities and Motivation 2001 Survey.

Clearly the future of cultural tourism is bright for those destinations with a quality, marketable culture and heritage-based tourism experience.

This particular brand of tourism is an opportunity to combine Canada and Manitoba's unique heritage resources to create travel experiences based on the authenticity and unique attributes of its cultural, ethnic and artistic heritage.

Manitoba has made some inroads in this sector of tourism, gaining a reputation for quality through such attractions and events as the Royal Winnipeg Ballet, The Manitoba Museum and Folklorama, among others.

However, a survey of the Canadian Tourism Commission sales force indicates a lack of awareness and familiarity with the culture and heritage product. Encouragingly, a survey of inbound and receptive tour operators and travel media notes a high degree of interest and attraction for the Manitoba product as a result of its quality and authenticity.

A Culture and Heritage Tourism Strategy

Through a series of industry events, the Department of Culture, Heritage and Tourism of Manitoba in consultation with its industry partners developed a new three-year strategy to reach the cultural tourism market.

On November 5, 2003, 102 representatives from the tourism and culture and heritage sectors attended “Meet, Learn Grow”, an event designed to unveil the strategy and outline opportunities for partnering. Guiding the strategy were the goals and objectives of:

- Expanding the number of quality culture and heritage tourism products and packages in Manitoba;
- Ensuring that the diversity of Manitoba’s culture and heritage product is effectively marketed to consumers and to the travel trade; and
- Partnering with over levels of government and the private sector in undertaking research, product development, marketing and training initiatives.

The six-points of the strategy are a direct result of the consultative efforts undertaken by the Department of Culture, Heritage and Tourism with the province-wide tourism industry. The key points include:

1. Focusing effort on the market-ready or near market-ready product;
2. Packaging product that meets the expectations of the primary North American markets including the Upper Midwest American states, Saskatchewan and Ontario;
3. Emphasizing the development of potential products for the shoulder seasons of fall and winter;
4. Expanding programming for group tours;
5. Fostering innovation and leading-edge technology;
6. Levering traditional and non-traditional partnerships.

Supporting these six points, an action plan was developed that identifies an annual focus for each of the three years. In year one, the focus will be on developing product for the shoulder and off-season so that these products can be introduced and promoted in the 2004 Travel Manitoba marketing campaign.

In year two, the marketing campaign will be enhanced to highlight culture and heritage product. Work will continue with each of the 21 products identified as market-ready or near market-ready to further their ability to fully participate.

As the third year of the plan unfolds, efforts will be focused on advancing relationships with the travel trade and tour operators and introducing them to the market-ready culture and heritage products. Programming for the summer and shoulder seasons will continue to be expanded while Travel Manitoba evaluates the success of the strategy.

Critical to the effectiveness of these plans will be the ongoing participation of both private and public sector partners.

The strategy closely mirrors the Canadian Tourism Commission's national strategy as it addresses the needs related to product development, communications and links, research, marketing, education and training.

Creating a Province-Wide Plan

Step One: Manitoba Tourism Forum 2001

In February 2001, at the invitation of Premier Gary Doer, more than 150 key stakeholders in the tourism industry gathered at the first-ever Manitoba Tourism Forum.

Their purpose was to establish strategic priorities for the industry in tourism product development and tourism marketing for the coming years. The event signaled a first industry-wide step in recognizing new and untapped opportunities, identifying challenges and areas where change was required, as well as capitalizing on strengths through the collective pooling of private and public resources.

In anticipation of the day, seventeen industry leaders trained and agreed to Chair and facilitate their colleagues in this process. Staff and organizational support was provided by Manitoba Culture, Heritage and Tourism.

To ensure the views of all participants were heard, individuals at each of 17 tables were first asked to record their thoughts in response to a number of questions. They then discussed the most important questions as a table, prioritized their responses, and presented them to the full group. The responses of the full group were “rolled-up” by the facilitators/staff and presented back as “initial priorities” of the Forum.

Discussions throughout the day were lively and constructive with viewpoints expressed from every sector of the tourism industry. One of the key questions posed to participants was: “What are the top three opportunities for development or expansion of our tourism products in Manitoba?” All responses were reviewed, priorities were assessed on a weighted basis and results were grouped as appropriate.

Three strategic priorities for product development emerged as a result of this input:

- Improve and expand Manitoba’s cultural and heritage-based tourism product;
- Improve and expand Manitoba’s nature-based tourism product and opportunities; and
- Pursue additional product opportunities for Manitoba as they become evident.

During the session, product development priorities were ranked based on all 17 tables’ ranking of the opportunities as first, second or third. Both Nature-based and Culture/Heritage Tourism were rated at the highest level on this basis.

With the new strategic priorities established, the Tourism Forum participants continued on – identifying new product opportunities and strategies. Addressing the priority of improving and expanding Manitoba’s cultural and heritage-based tourism product, the Forum developed five product opportunities, each accompanied by a series of four to eight strategies.

These product opportunities included:

- Expanding, developing and linking heritage and cultural tourism products;
- Creating Aboriginal cultural and heritage tourism experiences that reflect the tourism aspirations of Aboriginal people and offer a unique experience to their guests;
- Ensuring historical tourism is supported through enhanced product development and interpretation;
- Increasing product appeal, foster four-season tourism and draw people to the regions of Manitoba through cultural and heritage festivals and events;
- Upgrading, expanding and creating key cultural and heritage tourism attractions and agri-tourism opportunities.

Some of the opportunities and related strategies represented immediate wins that could be acted upon immediately. Others represented only an initial starting point that would require more consultative ground work, an identification of resources to dedicate towards the initiatives and a lengthier time-frame to complete.

The 2001 Manitoba Tourism Forum was an important and necessary step. Participants credited the event as an effective way to get major opportunities and strategies on the table. It also proved to be an effective means of introducing individual tourism representatives to a broader view of the sector and the related opportunities that existed.

Through this Forum, Manitoba emerged with a cohesive direction for their tourism marketing and product development priorities. Culture and heritage-based tourism products rose to the top of the list as a priority and Manitoba Culture, Heritage and Tourism set out to further the plan established at the inaugural Tourism Forum.

Step Two: Situation Analysis

A Canadian Perspective

The Canadian Tourism Commission's TAMS special reports on Performing Arts, Visual Arts and Heritage Tourism Enthusiasts in 2002 noted that of 23.3 million Canadian adults:

- About 2.6 million were Heritage Tourism Enthusiasts (11%)
- About 2.1 million were Visual Arts Tourism Enthusiasts (9%)
- About 1.3 million were Performing Arts Tourism Enthusiasts (6%)

Within the survey, eight out of ten claimed to have taken a leisure trip within Canada during the past two years. This response indicates that:

- The domestic tourism market for Canada's heritage products is approximately 2.2 million adults;
- The domestic tourism market for Canada's visual arts products is approximately 1.7 million adults;
- The domestic tourism market for Canada's performing arts products is approximately 1.1 million adults.

At the invitation of Travel Manitoba, Steven Thorne, of Burnett Thorne Cultural Tourism, delivered a presentation on the benefits of cultural tourism at a Manitoba industry forum in November 2003. His presentation provided further insight into the potential of cultural tourists including the following profile:

Who are Cultural Tourists?

- Tend to belong to mature age cohorts (ie baby boomers and the 55+ market)
- Have higher education (33% university graduates vs 28% among other travelers)
- Have managerial or professional occupations (31% vs 24%)
- Take longer trips (5.1 nights vs 3.4 nights)
- Spend more in the destinations they visit (\$631 vs \$427)
- Prefer hotels, motels and B&Bs (62% vs 56%)
- Shop more (45% vs 36%)
- Tend to be pleasure travelers

According to Mr. Thorne, culture is becoming a powerful tourism motivator as baby boomer demographics drive the demand, women play an increasing role in travel decision-making, international travel markets grow and all seek learning and enrichment experiences.

Steven Thorne's presentation also elaborated on the growing potential of cultural tourism as there will be an estimated 35 million more North Americans in the 55 to 74 age group by the year 2025. This 75% increase means that a total of 85 million individuals, or the entire, retired North American baby boom, will continue to increase a market eager to embrace cultural tourism.

Mr. Thorne's evidence also points to the fact that Canada is falling behind other jurisdictions in capturing a piece of the culture and heritage pie. The U.S. is leading the way with cities such as Atlanta, Miami, San Antonio, Los Angeles and more already creating and marketing cultural and heritage tourism products.

The Manitoba Perspective

Research was conducted in March 2002 to determine the level of awareness of Manitoba's culture and heritage products in nearby American markets. The survey concluded that 33% of respondents strongly agreed that Manitoba has many festivals and events and the same number expressed interest in urban adventures. As most culture and heritage-related activity occurs in cities and towns, it suggests that this primary market offers an opportunity to capitalize on the awareness and create interest to travel for culture and heritage activities.

To further support the findings of the Forum, Travel Manitoba commissioned a research firm to assess Manitoba's culture and heritage product from the two perspectives of market demand and export readiness. Travel Manitoba also undertook some secondary research and with these findings, completed a situation analysis that would provide the groundwork for the creation of a culture and heritage tourism strategy.

The study was valuable in identifying the market-ready and near market-ready product that currently exists in Manitoba. From this study, it was determined that Manitoba's culture and heritage product consisted of well over 200 individual attractions. Of these, 10% were market-ready or near market-ready and would benefit from marketing or development assistance.

Tour Operators

Travel Manitoba coordinated interviews with nine tour operators to identify their level of awareness of Manitoba's culture and heritage product. More than 50% of tour operators strongly agreed that the province offers one-of-a-kind culture and heritage experiences and that an opportunity exists to increase awareness with their customers.

Specifically, the operators identified the following key considerations which would assist in creating market demand:

- authenticity,
- learning about aspects of local culture and
- attending a festival or cultural event

Canadian Tourism Commission

Additional information was gathered from CTC staff working in Canada, in U.S., Japan, Germany, Switzerland, and UK CTC offices. Members indicated at least some familiarity with the culture and heritage products in Manitoba but were less certain that the province's offering would be one-of-a-kind.

The group confirmed previous findings that indicate authenticity of the culture and heritage experience was very important.

Media

Six writers from the UK, US and Canadian markets were interviewed about Manitoba's culture and heritage product. All six had visited Manitoba in the last two years. The media writers agreed that Manitoba offers unique culture and heritage experiences and reinforced that the authenticity of the experience was essential. Two other opportunities emerged from the interviews including the need for visitors to learn about local cultures and attend festivals and events.

Step Three: Gaining Momentum

Tourism Forum – Culture and Heritage. Share the Experience.

With 34% of Tourism Forum participants expressing a desire to capitalize on the province's culture and heritage tourism products, Manitoba's Ministerial Advisory Council on Tourism² endorsed the need for a culture and heritage tourism strategy that would increase tourism to and within the province.

Its goal was to begin developing a strategy specific to culture and heritage as well as to take the lead in packaging market-ready products. These products would encompass activities such as performing arts, visual arts and crafts, museums and cultural centers, historic sites, villages and interpretive centers as well as festivals and events.

² The Council is comprised of 27 members who represent the tourism regions and various sectors of the industry. The mandate of the Council is to provide guidance on the development of Manitoba's tourism industry to the government.

To gain the input and buy-in of industry partners, Manitoba Culture, Heritage and Tourism created a second Tourism Forum, this time focused exclusively on Culture and Heritage.

On November 27, 2002, more than 120 leaders in culture, heritage, tourism, labour and government came together to discuss future directions in this priority area.

Presentations and discussions throughout the one-day event provided a link to the national culture and heritage tourism strategy, views from the perspective of another jurisdiction (Ontario) and an examination of the current state of Manitoba's culture and heritage industry.

The Forum included both panel and individual presentations in the morning and roundtable discussions in the afternoon. Through this process, the industry was readily able to identify the following opportunities, challenges and shared values associated with culture and heritage offerings:

Tourism Opportunities

- A market segment that has been growing internationally at a rate of 15% annually;
- An increasing market comprised of aging populations of highly educated, well-traveled baby boomers;
- An increase in audience size and associated revenues;
- An expansion of the tourism season into the shoulder seasons.

Opportunities for Manitoba Attractions

- Creating new partnerships
- Sharing information
- Enhancing awareness of the sector

Challenges

- Lack of knowledge between the culture/heritage and tourism sector about the potential;
- Limited awareness of the product
- Limited market-ready product
- Culture and heritage sector ambivalence about tourism and concerns about sustainability and commercialism – including a perception that new initiatives may hinder the delivery of the core product.
- Human resource challenges as volunteers are already over-taxed and limited staff is available to pursue new ventures;
- Need to balance the requirements of the growing local audiences and tourists;
- Links between levels of government and among sector proponents are in their infancy and are just being formalized;
- Limited dedicated resources for development and marketing;
- Lack of education and training tailored to the cultural and heritage tourism sector;
- Government investment in upgrading and maintaining attractions has been limited by funding cutbacks.

Values

- Provide authentic and quality experiences;
- Maintain standards and core activity;
- Preserve and protect the resource as a guiding philosophy;
- Protect and nurture local interests as well as create new initiatives;
- Develop active partnerships including partnerships with Aboriginal organizations;
- Make research-based and market-driven development decisions.

With this overall foundation in place, the participants moved forward to develop six new potential product concepts. Some of the concepts featured experiential tourism components while others offered ideas for potential partnership building or sponsor development. Each focused on combining Manitoba's specific cultural and heritage assets in a unique and innovative way.

The need for establishing a Manitoba brand, enhancing communication among organizations and between organizations and government departments was considered important as was the need for a well-developed quality assurance program, education and training opportunities and financial support for long-term planning, demonstration projects and partnerships.

As the second Tourism Forum drew to a close, participants agreed that the day had been a productive success, moving the province closer to developing an integrated strategy to address the development of culture and heritage-based tourism products.

Continuing the momentum, Manitoba Culture, Heritage and Tourism synthesized the day's findings and went forward in consultation with the Ministerial Advisory Council on Tourism to develop the Culture and Heritage strategy.

Essential to the development of a research-based, market-driven strategy was the need to respect the values of the culture and heritage sector and to ensure that the strategy incorporated measurable objectives to assess results. Links would also be made to The Canadian Tourism Commission's five year strategy "Packaging the Potential" and its five key areas of development for the sector.

Participants also recommended a follow-up event that would provide an ongoing opportunity for the culture, heritage and tourism sectors to network.

Step Four: Presenting the Strategy: Tourism Exchange 2003 – Meet Learn Grow.

“I learned about products I had no idea existed, including some of the behind-the-scenes experiences that offer potential for packaging. I am continuing to meet with some of these contacts and we are developing some new products. The Tourism Exchange was an excellent forum – it should be an annual event.”

*Karen Kingsland,
Casinos of Winnipeg*

On November 5, 2003, 102 tourism members attended “Meet Learn Grow”, a Tourism Exchange designed to unveil the culture/heritage strategy and create opportunities for partnering. Organized by a committee made up of representatives from government, culture and heritage attractions and the tourism industry, the Tourism Exchange offered a full day dedicated to the advancement of culture and heritage tourism in Manitoba.

Setting the tone for the day, Steven Thorne from Burnett Thorne Cultural Tourism provided research that identified actual market demand for the cultural product. His presentation confirmed the potential of the sector, noting that in 2001, Canadians took:

- 6.5 million person trips that included a museum or art gallery;
- 7.8 million person trips that included an historic site;
- 5.7 million person trips that included a cultural event;
- 6.2 million person trips that included a festival or fair.

During the day, participants also enjoyed two 1.75 hour sessions dedicated to networking one-on-one. This exchange provided participants with a series of five minute individual meetings with a total of 20 potential business partners.

Response to this marketplace-style approach to networking was excellent. Karen Kingsland of the Casinos of Winnipeg participated in the sessions and continues to benefit from contacts made. (As evidenced by the quote above).

Judy Murphy, Chief Operating Officer of the Royal Winnipeg Ballet also participated in the Tourism Exchange and shared an equally positive response. Notes Murphy: “We were able to meet with potential partners who might not have ever crossed our mind. The five-minute interviews were really successful. Participants were very focused and you could see they didn’t want to end their conversations when the time was up. This was the best benefit because it allowed us to initiate new relationships.”

The day concluded with a wrap-up session where participants outlined their expectations for the future. Recommendations included:

- Scheduling follow-up meetings to further develop partnerships. The sectors agreed to identify the partners while Travel Manitoba would facilitate the meetings;
- Posting information on the web such as ways to connect attractions with operators and a resource of packaging information;
- Hosting training workshops focused on packaging; and
- Providing opportunities for more operators to attend Rendez-vous Canada 2005, in Saskatoon (SK).

One of the highlights of the Tourism Exchange was the unveiling of a new six-point strategy for the development of culture and heritage tourism in Manitoba. The province's Deputy Minister of Culture, Heritage and Tourism, Sandra Hardy, presented the strategy to the participants.

Lessons Learned

In creating consensus and gathering input from the industry, there is no substitute for face-to-face consultation. Through the Forums and the Tourism Exchange, partners from all sectors were able to learn about how other businesses operated, discover new opportunities for packaging and cross-promotion and begin to build relationships that can provide economic returns in the short and long-term.

Throughout these sessions, several learnings emerged that, while simple in statement, can result in complexities as a cohesive plan is developed. Some of the key lessons included:

- The culture and heritage sector and the tourism sector lack awareness of one another and the challenges each faces. Although each sector is an important component of the overall tourism industry, communication between the two groups has been limited. As a result, awareness training will be a key component of the strategy to ensure that the dialogue continues and that all opportunities come to light.
- Adhering to specific values related to preservation and protection is vitally important to the culture and heritage sector. Some participants were concerned that some of the values may be lost with the development of tourism. Within the plan, values were stated and as the tourism potential is developed, maintaining the values will be important to the overall success of the plan.
- Despite substantial research outlining the economic benefits of pursuing a strategic culture and heritage tourism plan, not all of the culture and heritage tourism participants were ready or wanted to participate in the development of tourism opportunities. As one of the first objectives is to develop some immediate “wins”, the plan will focus on working with the market-ready attractions that are interested in pursuing tourism opportunities now.
- The peak season for arts and cultural attractions is fall and winter while most of Manitoba’s tourism occurs in the summer months. As a result, it is essential that the strategy’s focus be on developing shoulder season packages for tourists that will enhance the fall and winter season of the arts and culture sector.

Other tactics that proved successful in hosting the Forums and moving forward included the support of the Premier of Manitoba Gary Doer and the Minister and Deputy Ministers of Culture, Heritage and Tourism. Their involvement helped to elevate the discussion and stimulate participation.

The involvement of the Canadian Tourism Commission also was essential in establishing the tourism opportunities within this sector. The CTC’s research findings in this area offered a big-picture perspective of the potential associated with culture and heritage tourism.

Although Travel Manitoba commissioned a firm to assess Manitoba’s culture and heritage product from the perspective of market demand and export readiness, other factors needed to be taken into account. These factors included community readiness as well as stakeholder acceptance and commitment. To augment the findings of the firm, Travel Manitoba also undertook its own secondary research analysis that proved invaluable.

Moving Forward

The approach outlined within this report provided an effective and inclusive method for creating a three-year strategy to advance the culture and heritage tourism sector.

Through the use of a strategic methodology, the Department of Culture, Heritage and Tourism and its industry partners were able to explore the opportunities and challenges associated with this sector, create new relationships that would assist in the development of new product and identify educational and training needs to ensure the product is market-ready.

This process was built on a foundation of support from the Culture, Heritage and Tourism department, first and second-party research, and an ongoing dialogue with members of the tourism industry. Each component was integral in reaching the goal of developing a three-year strategy. This province-wide strategy is being implemented beginning in November, 2003.

In the future, the Department will work in partnership with the tourism industry and the culture and heritage sector to implement a marketing and communications plan that focuses solely on the culture and heritage tourism product, while continuing to enhance the market-readiness of the existing product and create new products.

Appendix I

Situation Analysis ***Towards a Tourism Strategy***

**Manitoba Culture, Heritage
and Tourism**

Towards a Tourism Strategy

Situation Analysis



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1. Introduction

Definition of Culture and Heritage Tourism

The Canadian Tourism Commission defines culture and heritage tourism occurring when participation in a cultural or heritage activity is a significant factor for travelling.

Manitoba has defined it as including the following:

- ▶ Performing arts
- ▶ Visual arts and crafts
- ▶ Museums and cultural centres
- ▶ Historic sites, villages and interpretive centres
- ▶ Festivals



Does not include:

Natural heritage experiences
Sports
Adventure

Has linkages to:

Aboriginal tourism
Language learning tourism
Culinary

This report highlights the opportunities and challenges that affect the culture and heritage sector industry in its attempt to determine the tourism potential for the sector.

It also provides a summary of the findings of research that was conducted in the fall of 2002.

Travel Manitoba thanks Gregoire Belland and Associates, Wendy Molnar, Michelle Gervais, Lynn Fanelli, Danielle Paetz, Lee Weatherill and Susan Ross for providing the research findings for this situation analysis.

2. Executive Summary

The Opportunity

By definition, heritage and cultural tourism includes a variety of experiences focused on the cultural, historical and social resources of peoples, communities and regions. Current Research indicates the number of travelers seeking this experience is growing. This particular brand of tourism is an opportunity to combine Canada and Manitoba's unique heritage resources to create travel experiences based on the authenticity and uniqueness of our cultural, ethnic and artistic heritage. It is also an opportunity for Manitobans to capitalize on the growth of this type of tourism in order to create social and economic benefits for their communities and regions.

The collaboration between the tourism sector and the cultural and heritage sector can result in many benefits such as increased revenues in the off season, improved visitor satisfaction, support for culture and heritage, new markets and new products. Statistics Canada reports there is a growing trend toward culture and heritage travel. Between 1996 and 1999 this type of travel by Canadians increased 10%. And the economic benefits are substantial since they generated in the same period 21% of Canadian travel expenditures.

Travel Manitoba commissioned Gregoire Belland and Associates to assess Manitoba's culture and heritage product from two perspectives: market demand, and export readiness. Additional factors such as community readiness, stakeholder acceptance and commitment need to be taken into account as an integral part of the development of the product and the implementation of a plan to bring the product to market readiness.

Background

In 1998 the Canadian Tourism Commission held a series of round table discussions across the country to discuss the potential of heritage and cultural tourism as a product line for Canada. The discussions were fruitful, and in 1999 the Commission enlisted volunteers from both the tourism and culture/heritage sectors to develop a national business strategy. This business strategy was published the same year.

In February of 2001 the travel industry in Manitoba assembled its first Tourism Forum to discuss and plan the future of Manitoba's industry from a market opportunity perspective and from a product development perspective. Culture and heritage tourism was identified as a priority product. Culture and heritage encompassed a number of other products including: Aboriginal tourism, festivals/events and agri-tourism. Participants felt the product should be developed and expanded, the product's appeal should be increased and the season should be extended to all seasons. Participants at the forum believed that attractions in this sector needed to be upgraded and expanded to include the unique culture and heritage themes representing Manitoba's history, peoples, places and events. The Belland study was the first step in the process to achieve the outcomes of the 2001 Tourism Forum.

Results

Market Demand

The findings confirmed that there is a demand for culture and heritage attractions and experiences and the demand is increasing. The Canadian Tourism Research Institute forecasts that the demand for cultural tourism travel will continue to grow and that operations that capitalize on this growth will benefit.

A survey of the Canadian Tourism Commission sales force indicated some problems with awareness and familiarity with the culture and heritage product in Manitoba.

A survey of inbound and receptive tour operators and travel media indicated a high degree of interest and attraction for the product identifying that quality and authenticity were unique selling features.

Market Readiness

A survey of 60 heritage and cultural attractions in Manitoba revealed that many of the attractions are market ready and over a third have export potential. The significant market readiness and export potential issues included:

- ▶ lack of packaging and partnership development between the attractions and the travel sector;
- ▶ communications between the two sectors was inconsistent and not market driven;
- ▶ the attractions often lacked marketing resources;
- ▶ some did not have marketing plans;
- ▶ although market ready attractions that were identified had full time staff, many still operate with volunteer resources

Specific factors that could build the support for further development of the culture and heritage tourism sector include the following opportunities:



- Increase audience size and revenues*
- Increase profile and provide more opportunity for community support and corporate sponsorship*
- Communicate Manitoba's culture and heritage to the world*
- Support partnering with others to reduce costs*
- Provide tour companies and regions with products to market*
- Augment what there is for tourists to see and do in Manitoba*
- Offer tourists unique experiences*
- Capitalize on growing market demand for quality cultural experiences and niche segments (learning vacations)*
- Overcome the challenges of seasonality*

3. Opportunities and Challenges

The analysis of the market demand and market readiness assessments identifies challenges and opportunities that can assist the culture and heritage sector to determine the benefits in participating in the tourism industry.

Opportunities

The market segment has been growing internationally at a rate of 15% per year.

The market is expected to increase with aging populations of highly educated, well-traveled baby boomers.

Canadian products have significant potential - Canada is seen a safe place to travel.

Challenges

Limited awareness of the product. Manitoba has been promoted as a natural and recreational destination.

Lack of knowledge between the cultural/heritage and tourism sectors about the potential.

Linkages between culture/heritage and tourism at the government and working levels are just being formalized.

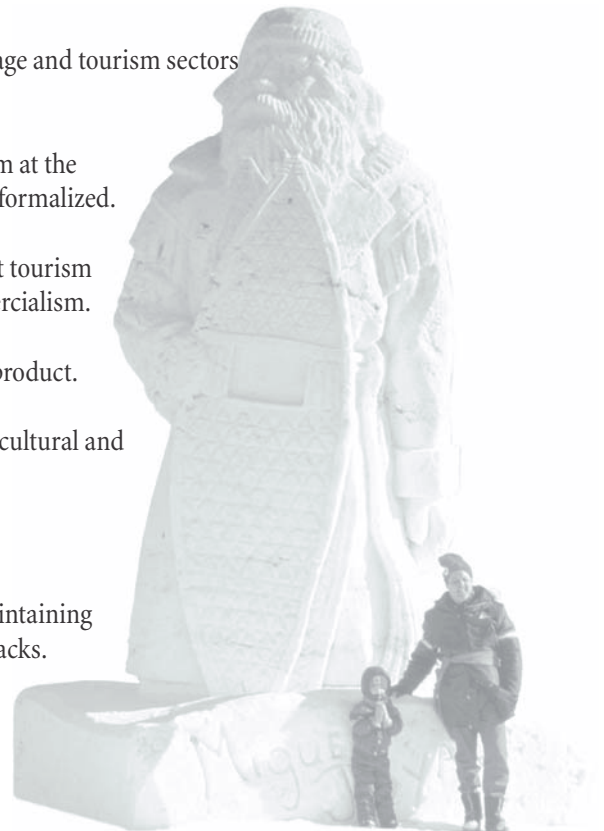
Culture and heritage sector ambivalence about tourism and concerns about sustainability and commercialism.

Limited resources to develop and market the product.

Lack of education and training tailored to the cultural and heritage tourism sector.

Limited market-ready product.

Government investment in upgrading and maintaining attractions has been restrained by sector cutbacks.



4. Results/What we learned

4.1 Tourism Environment

- World Tourism Organization reported that 37% of international trips include a cultural component.
- Tourism growth has been impacted by the global economic slowdown and the war on terrorism.
- The World Tourism Association reports that travel worldwide had decreased by 1.3% in 2001. Travel patterns will continue to shift over the short term:
 - Higher usage of bus and rail for short trips.
 - Use of Beds & Breakfasts and Inns over big hotels.
 - Visiting smaller venues and attractions.
 - Visitors seek safe destinations
- World Travel Organization forecasted full recovery by summer 2002.
- The Conference Board of Canada projects travel could increase by 2.3% in 2002.
- The Internet continues to be an emerging trend with 13.3% of American's booking a pleasure trip through the Internet.
- Requirement to look at tourist needs as an experience rather than an individual product; there is a need to package the experience.

Latest Trends

(Percentage of trips by type, cultural versus non-cultural, 1996-1999)

	Total	Cultural Trips	Non-cultural Trips
Province of destination:	4.2	7.4	3.6
Newfoundland	0.2	2.2	-0.2
Manitoba	1.3	-17.6	4.2
Ontario	2.3	4.6	1.9
Quebec	2.6	-2.6	3.5
Saskatchewan	3.6	1.7	3.8
British Columbia	3.7	21.4	0.1
Alberta	9.5	18.3	8.1
Prince Edward Island	9.8	11.6	8.7
New Brunswick	13.6	31.5	10.2
Nova Scotia	14.9	15.6	14.6

Source: Canadian Travel Survey Demography Division

In all provinces except Quebec, Saskatchewan and Manitoba cultural visits increased, suggesting a great opportunity for growth

Cultural Heritage Travel Trends



Visits to cultural events, museums and heritage are increasing - growth of 10% between 1996 and 1999.

Canadian and US culture and heritage tourists spend more than other tourists. They travel farther and for a longer period.

The culture and heritage tourist is more educated, has a slightly higher income, and prefers to travel in the summer months.

43% of culture and heritage tourists in 1999 were female and 39% male, the remaining 18% being children.

In 1996 and 1999, 49% of culture/heritage travelers went shopping as compared to 25% of other tourists.

4.2 Market Readiness

Examined 60 culture/heritage products from a market readiness point of view

Market Ready: Tourism product groupings or individual operators that are ready to be sold to domestic tourism markets and long-haul tourism markets outside Canada.

Measures of Market Readiness included:

► **Marketing**

"The product is interested in attracting tourism and is capable of participating in cooperative marketing programs... has a marketing budget and a management structure that allows decisions to be made"

► **Quality Experience**

"The product is presented in a professional manner that leaves the customer satisfied"

► **Packaging**

"The product has systems that allow it to be included in tourism packages (Advance ticketing, pricing, reservations). The product is accessible to tourists"

Out of the 60 attractions surveyed 29 met or partially met all the criteria.

Marketing

Marketing Plan

- ▶ 87% of attractions have a marketing plan

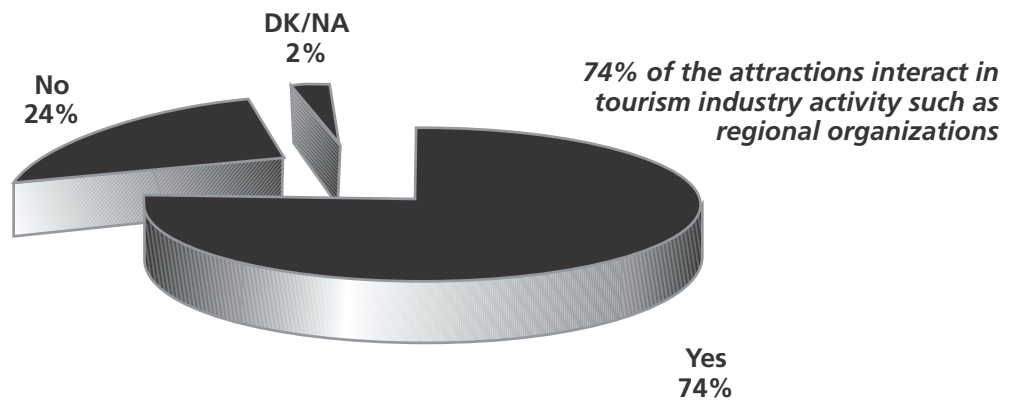
Marketing Budget

- ▶ all attractions allocate funds to marketing
- ▶ 7 are spending more than \$100,000 annually

Accessible information

- ▶ all attractions had information available all year round

Interacting in Industry Activity

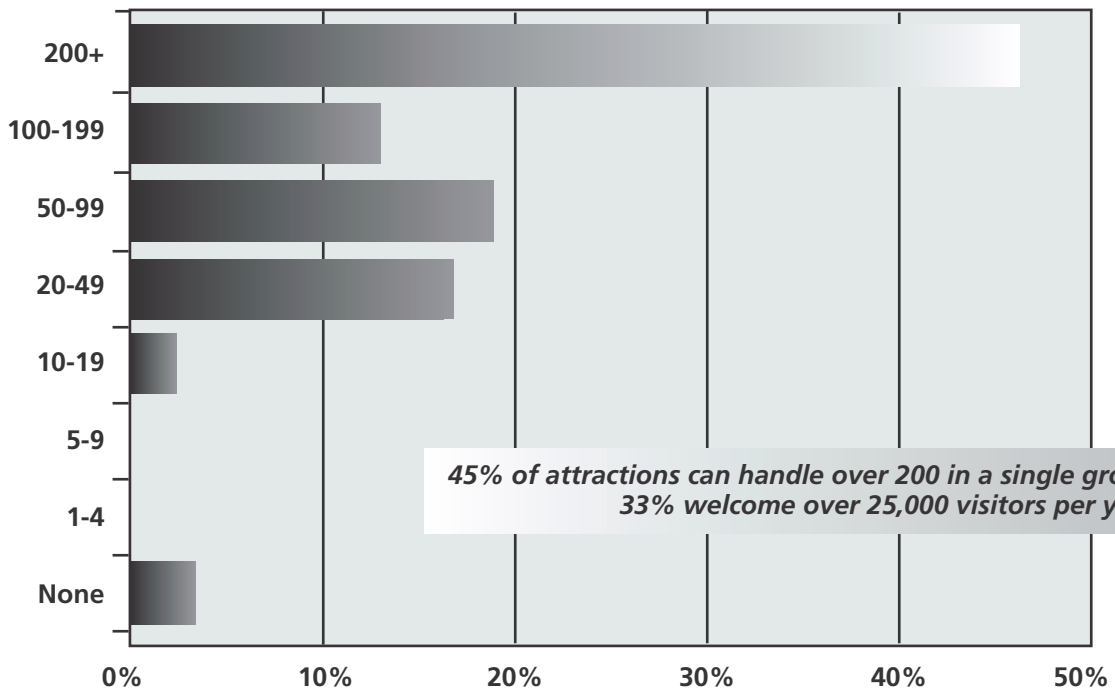


Accessible at All Times

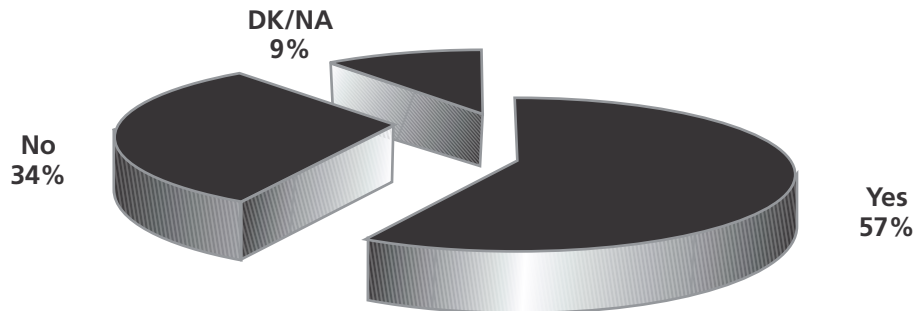


90% of attractions interviewed are available to provide visitor information all year round

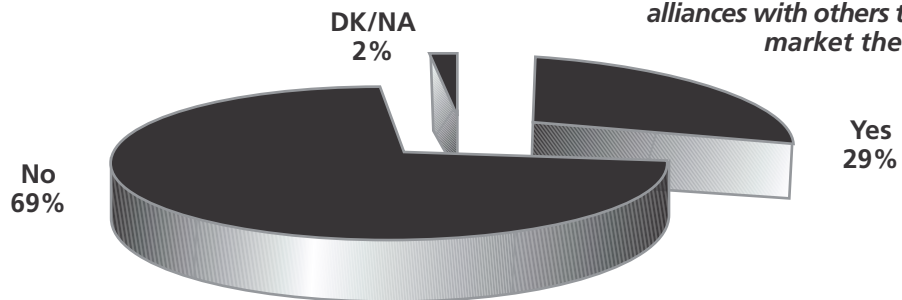
Maximum Visitors in a Single Group



Pricing in Place that works with Partners

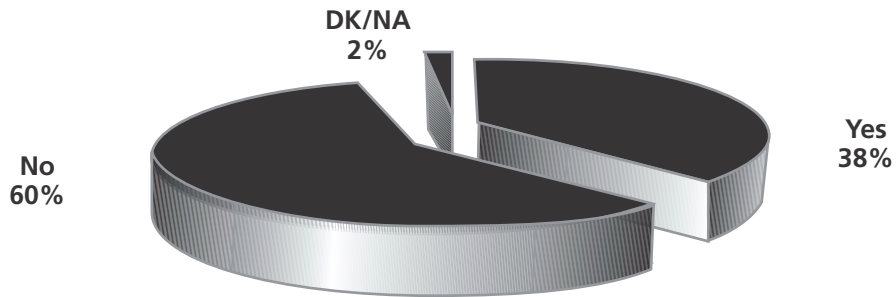


Packaging with Partners



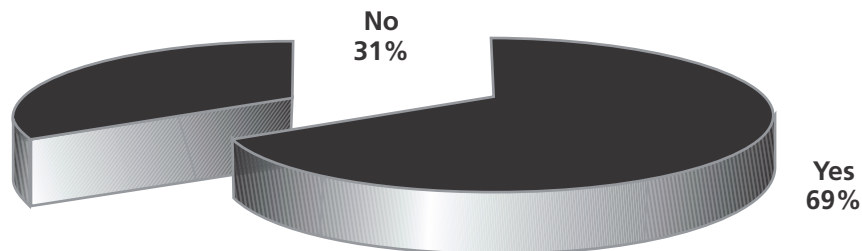
57% of attractions are currently providing tiered pricing to operators and 69% have formed alliances with others to effectively market their attraction

Part of Tour Operators Package



60% of the attractions interviewed noted that they are part of a Tour Operators package

Specially Developed Programs for Interest Groups



69% indicated that they have programs designed for special interest groups

The previous seven charts or graphs indicate the responsiveness of the culture and heritage industry to the commitment of creating market ready tourism attractions - 29 of the 60 attractions are market ready or near market ready.

More than two thirds indicated they did not package with partners and Tour Operators: there is a need to develop relationships.

Efforts should be made to encourage partnerships and effective collaboration. Participation in cooperative marketing programs was undertaken by 7 out of the 29 market ready attractions.

Advance pricing, and the ability to offer commission products need improvement.

More information needs to be gathered from customers to assess areas requiring improvement.

4.3 Market Demand

Level of Awareness

Tour operators have the highest level of awareness regarding Manitoba's cultural and heritage attractions, as 4 out of 9 indicated they were very familiar with these products.

All of the CTC members indicated at least some familiarity with the cultural and heritage products in Manitoba.

All writers interviewed indicated that a small part of their writing focuses upon Manitoba attractions and that their readers would be interested in stories regarding these products.

Interest in Manitoba as a Culture/heritage destination

Opportunity to increase awareness among customer bases.

1/3 of the tour operators polled did not know what percentage of their clients would be interested in Manitoba as a culture/heritage destination.

CTC members indicated a lower percentage of its clients would be interested in Manitoba compared to tour operators.

Rate Manitoba's uniqueness in culture/heritage experiences

Media agreed that Manitoba offers unique cultural and heritage experiences.

Over half of tour operators strongly agreed Manitoba offers one-of-a-kind culture and heritage experiences.

CTC members less certain, with 2 out of 6 neither agreeing nor disagreeing.

Unique culture/heritage experiences that can be marketed

	CTC	Tour Operator
Polar Bears	67%	0%
Folklorama	33%	22%
Festivals and events	17%	22%
Mennonite attractions	17%	22%
French culture	0%	33%
Aboriginal culture	0%	22%
Nature/Wildlife	0%	22%
Museums	0%	22%

Importance of Authenticity

All tourism partners considered the authenticity of the cultural and heritage experience to be important.

Both the media and the CTC considered this to be very important.

	Very Important	Somewhat Important
CTC	100%	
Tour Operator	89%	11%
Media	100%	

Highest rated Characteristics

The tourism partners all identified the friendliness of the people as a distinguishable characteristic of the culture and heritage sector in Manitoba. Other characteristics are identified in the table below.

CTC	Tour Operators	Media
Friendliness of People Good exchange rate Safe Destination	Friendliness of People Good exchange rate Festivals and Events Quality experiences	Friendliness of people Good value Safe Destination

Opportunities for improvement

Not one specific opportunity was identified as essential to the growth of the culture and heritage tourism sector in the province.

CTC	Tour Operators	Media
Live theatre performances	Proximity to market Transport Links (air access) Shopping for local arts/crafts	Local Indigenous experience

All the tourism partners highly rated the need to provide aspects of local culture within the experience and to attend a festival or cultural event.

The tour operators believe that eating local/ethnic food adds value to the experience.

Media identified visitation to historic sites or villages as key to the overall experience.

Importance of Services

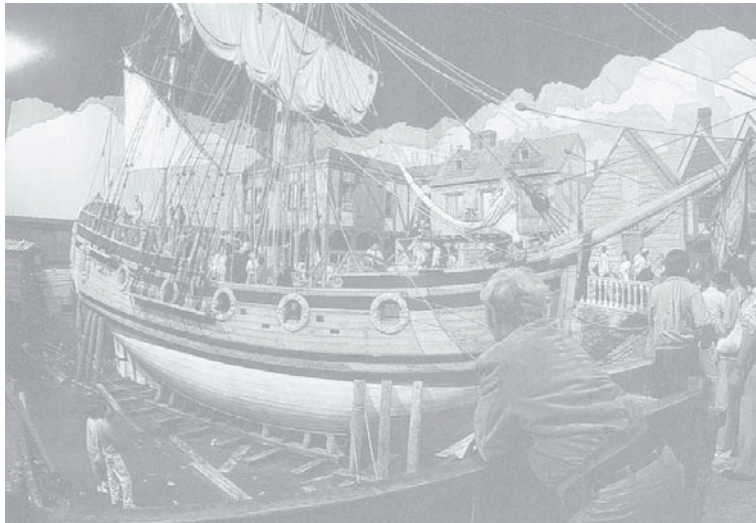
Important to the visitor and the tourism partner alike is the need for knowledgeable guides and interpretive materials to ensure a quality experience.

CTC	Tour Operators
<p>Knowledgeable guides Interpretive materials Quality dining facilities</p> <p><i>Requires improvement</i> Road access</p>	<p>Knowledgeable guides Interpretive materials Quality accomodations Easy access to information</p> <p>Air access Shopping facilities</p>

Next Steps

Towards a culture/heritage tourism strategy

Work in consultation with the culture and heritage tourism stakeholders to review research results and develop a long-term strategy for growth.



Appendix II

Action Plan for the Tourism Strategy (An abridged version)



Culture and Heritage

**Share the Experience
2003-2005 Tourism Strategy**

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Goals and Objectives

To expand the number of quality culture and heritage tourism products and packages in Manitoba.

To ensure that the diversity of Manitoba's culture and heritage product is effectively marketed to consumers and to the travel trade.

To partner with other levels of government and the private sector in undertaking research, product development, marketing and training initiatives.

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Product Development

- Host forums ("Meet Learn Grow") to provide networking opportunity.
- Create a database of culture and heritage tourism stakeholders for use in developing future programs.
- Work with near market-ready attractions to develop marketing strategies to encourage co-operative marketing.
- Support the implementation of a central reservation system.
- Develop product clubs in consultation with the Canadian Tourism Commission e.g. fur trade or visual arts theme

Culture and Heritage

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Manitoba




Marketing

- Continue to expand the culture and Heritage campaign in 2004 - explore innovative ways to partner with industry
- Create a strong image for Manitoba's culture and heritage products as part of the Manitoba brand.
- Host Familiarization tours and generate information to stimulate interest with the travel media and travel trade.
- Produce new print materials to support campaign.

Culture and Heritage

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Marketing

- Launched a pilot marketing program targeting North Dakota

Cultural and Entertainment Getaways!

If you want the best in live theatre, music, and entertainment, Manitoba has what you're looking for! Take in a play at Manitoba Theatre Centre or the Prairie Theatre Exchange, or revel in the grandeur of the Royal Winnipeg Ballet and the Winnipeg Symphony Orchestra. Feeling lucky? The Casinos of Winnipeg are ready to serve up everything you're looking for in a casino... and so much more. Great entertainment packages are ready for you - just click on one of the fantastic offers below!

Incredible entertainment, great value, close to home. That's Manitoba..

Entertainment Getaway Packages

<p>Prairie Theatre Exchange packages October 29 - April 4 \$77 CDN (\$59 USD)*</p> <p>Winnipeg Symphony Orchestra packages November 14 - May 14 \$84 - \$89 CDN (\$65 - \$69 USD)**</p>	<p>Manitoba Theatre Centre packages November 26 - April 24 \$87 - \$109 CDN (\$67 - \$84 USD)**</p> <p>Royal Winnipeg Ballet packages December 20 - May 6 \$84 CDN (\$65 USD)**</p>
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Packages include: One night's accommodation at a Canad Inn Hotel.
 Ticket to one of Winnipeg's Premier arts performances.
 \$30 in Casinos of Winnipeg vouchers.
 Coupons for other Winnipeg attractions.
 Additional nights are available.

* Costs are per person, hotel based on double occupancy. Contact O Tours or Heartland Tours for additional pricing and performance information. Limited packages available.

Did You Know?

The Bloodvein River passes through spectacular, 30 foot granite cliffs, faced with veins of blood red stone and ancient displays of Aboriginal petroglyphs?

Student Resource Centre
Researching a school project? Start here.

Travel Manitoba Information Kits
 [Click here to receive your free Travel Manitoba Information Kits](#)

Manitoba Weather
For current weather conditions in Manitoba [click here](#).

Recent Real-time Temperatures
Summer: 22°C / 74.3°F (south)
Winter: -15°C / 5°F (south)

Get Your Site Listed With Us
 [Click here to have your site listed on travelmanitoba.com.](#)

Weekend Theatre Combo

November 28, 29, and 30
\$177 CDN (\$137 US) per person *

Package includes:
 Two nights accommodation at a Canad Inn Hotel.
 \$30 in Casinos of Winnipeg vouchers.
 Two-for-One voucher for the Manitoba Museum & The Winnipeg Art Gallery.
 Ticket to the following:

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Manitoba**



Communications and Training

- Provide information about opportunities and success stories to Canadian Tourism Exchange, Travel Canada site monthly and Manitoba Tourism Industry websites.
- Highlight tourism opportunities at other industry related forums e.g. Arts Culture Industry forums.

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Research

- Support the implementation of a standardized exit survey to assist the industry in obtaining Manitoba-made visitor statistics.
- Evaluate the success of the strategy.

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Six Point Strategy

1. Invest in the development and promotion of market-ready or near market-ready product.
2. Package product for primary North American markets (Upper Midwest U.S., Saskatchewan and Ontario).
3. Develop potential of the shoulder season (fall and winter).
4. Target travel trade and travel media.
5. Support innovation and leading-edge technology.
6. Leverage partnerships
(traditional and non-traditional).

Culture and Heritage

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