

Tourism Industry Association of

Manitoba



Tourism Development in Manitoba 2021

Launching Feasibility of a Tourism Industry
Association (TIA) for Manitoba & Implementing
a Tourism Development and Training Plan

January 31, 2022

Introduction

The following report documents the completion of two separate projects for tourism development in Manitoba:

1. To investigate the feasibility of a Tourism Industry Association for Manitoba (TIAMB); and
2. To lead the research, design and implementation of a Tourism Industry Development and Training Plan.

On behalf of the Working Group for these projects, we would like to extend recognition and thanks to the following:

- To our partners in this project: Manitoba Chamber of Commerce (MB CoC), Travel Manitoba and the Manitoba Tourism Education Council (MTEC).
- To the Government of Canada – PrairiesCan and the Regional Recovery Relief Fund (RRRF).
- For the volunteer time and contributions of Working Group members, representing diverse sectors and regions of our province.
- To the 155 participants of the online survey and the 8 interviewees that spoke directly with our project coordinator. In our webinars and workshops, we hosted and engaged with over 100 Manitoba operators and welcomed dialogue with industry, organizations and tourism leaders across the country.

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1. Executive Summary

For over 20 years, the tourism industry in Manitoba has contemplated the viability, necessity or value of an industry-led, advocacy voice for operators in the province. Over that time, there have been many renditions of industry advisory groups, committees and working groups, convened by the Provincial government such as Travel Manitoba or by industry colleagues, hosting conversations about viability or value.

It's important to note that in the absence of a formalized, incorporated tourism, industry-led advocacy organization, the Manitoba Chamber of Commerce has taken on tourism files, communications and outreach, through Travel Manitoba. Today's feasibility work would not be possible without their administrative support, contract facilitation and communications networks.

The funding for this project was provided with two objectives:

1. Lead the feasibility research of a Tourism Industry Association (TIA) for Manitoba; and
2. To develop and deliver a tourism development and training program, impacting awareness, knowledge and skills for operators and stakeholders across the province.

As such this report will speak to two projects separately, where relevant, as:

**Project 1. TIA MB Feasibility and
Project 2. Tourism Development Series**

Methodology, survey design and interview highlights are included in this report. This summary represents conclusions and insights from both projects.

Project 1. TIA MB Feasibility – A Green Light

There is perceived value in an industry association for tourism in Manitoba.

60% cited having issues they have needed an industry voice for. The foremost value of a TIA to stakeholders in the province is advocacy, followed by networking opportunities, information and communication, shared cost affinity programs i.e.: negotiated rates, members discounts and communications, etc.

A few guiding principles for those involved include:

- **Partnership and Collaboration:** Essential with all the leaders, stakeholders, organizations and industry members working to support recovery from COVID, and to regain a thriving tourism industry in the province;
- **Mandate and Focus:** Once the mandate is finalized, stay focused on purpose and resist the temptation to be distracted by issues that do not have ‘greater’ impact to the larger industry (i.e.: improved research and education for operators versus advancing a wilderness licensing issue). Where issues are sector-specific, a TIA can support or collaborate with the leadership by those sector-specific issues;
- **Board Governance:** Ensure that Board or governance representation is diverse, representing regions and sectors of the tourism industry unique to the province. Furthermore, collaboration or input from existing tourism/sectoral organizations will be essential to meaningful dialogue, the advancement of shared advocacy priorities and possible future operational cost savings. The challenge will be building an effective and representative governance model that can stay at a maximum management size of 9-11 persons;
- **Lead, Facilitate and Collaborate:** TIA MB has the opportunity to be both a leader in advocacy priorities and also play a valuable partnership or collaborative role;
- **Committee Structure:** One consideration is to create committees that can lead issues, such as working committees, but always with the authority to report and recommend to the larger Board. This would be captured in the terms of reference. Examples could be marketing, research, events, fundraising, strategic planning, etc.;
- **Continual Learning:** TIA MB has many opportunities to learn from other TIA’s as the organization builds itself out; and
- **A Convener:** TIA MB’s key role will be facilitating and working with stakeholders and organizations in the province towards common industry goals with a collective voice in advocacy, as well as elevating the tourism industry value to the province

It is important to note that conclusions were made from input from diverse voices in the survey data including all sectors, regions, urban and rural, organizations and operators, indigenous and francophone.

Project 2. Tourism Development Series – Making Impact, Gaining Insights

Guiding principles for the development of a Tourism Training Series included:

- Propose training and/or workshops and webinars that will meet broader interests and relevance to the industry across the province;
- Keep training accessible (online) and ensure a way to measure impact or knowledge/value gained from the program; and
- Work with Travel Manitoba and MTEC to understand their training, development goals, or programs, in order to so as to complement or leverage those investments with programs or workshops that are aligned, connected, or build on future learning.

Variables that made implementation challenging included:

- Our partner organizations experienced training or learning apathy, whereby the industry communicated their needs or interests but did not participate when learning opportunities were offered;
- Many operators were still in the trenches, not having available time to participate in online learning;
- For the development and design of the Tourism Development Series, we surveyed industry members online and engaged with both Travel Manitoba, regional tourism place-brand stewards and Travel Manitoba;
- From research, we learned that the workshops of interest, training needs and interests were very diverse – from entry level training to business management knowledge and advice; and
- Specific areas of learning interest included all facets of marketing, funding, insurance, business operations advice, digitizing business, supporting or joining existing advocacy efforts, etc.

Two Approaches to Development and Training:

1. Webinars hosted by the Working Group of TIA Manitoba, and
2. with Manitoba Tourism Education Council (MTEC)

Approach 1. Webinars

In total, over 90 people registered and 75 participated in the industry webinars coordinated with the TIA MB Working Group.

- **Industry Panel from the Trenches: Coffee and COVID** with over 40 industry leaders from across the country, sharing their experiences of COVID impact to their businesses and how they persevered through it.

The recorded online event was well attended and the feedback was positive and appreciative (September 22, 2021 via ZOOM).



- **Industry Panel: Data Driving Tourism** with industry leaders in the province, and research and data experts in Canada, for Destination Canada and Travel Manitoba. This 1.5 hour webinar featured best practices, advice, the latest in plans and sources, top tips from each presenter and perspectives, challenges and opportunities about leveraging data insights for business development and growth (January 19, 2022 via ZOOM).

See Findings and Analysis for details, contributors and results.

Approach 2. In Partnership with MTEC

In summary, MTEC proposed two training methods: one-on-one coaching and workshops. Since the launch of this program, the registration has been low and MTEC and the Working Group continued to reoffer, adjust and promote to fit needs and feedback.

One on One Coaching:

Twenty-five industry members were eligible to receive 3 one-hour sessions with a coach, facilitated by MTEC re: business development, management, insurance navigation, marketing support, etc. Only 3 Tourism Businesses took part in the counselling sessions. Two out of three businesses had several counselling/coaching sessions.

Workshops:

MTEC also designed two workshops (Marketing in Challenging Times and Reinvention Through COVID). In total, 41 operators were able to engage and take advantage of the MTEC series.

- **Marketing Your Business in Challenging Times**
Delivered three times due to low or no registration
(October 20, 2021, November 16, 2021 and December 14, 2021)
- **Innovation & Reinventing Your Business:
Pivoting for the Short and Long Term Survival of Your Business**
Delivered three times due to low or no registration
(October 25, 2021, November 18, 2021 and December 15, 2021)
- **Courage to Face Fear & Confidence to Embrace Change**
Delivered twice due to low or no registration
(December 9, 2021 and January 14, 2022)
- **Change a Losing Game-How to Pivot to a Winnipeg Position With Innovation
or Reinvention**
Delivered once on January 11, 2022

See Findings and Analysis for details, contributors and results.

Conclusions from the Development Series

In conclusion, we believe the main reason for the lack of Tourism business owners and managers taking advantage of the free training and counselling was more likely a result of them working in their businesses to keep them operational.

There has been a severe labour shortage in Manitoba. Many businesses are unable to operate to capacity as a result of not having enough employees. One of the impacts of the continual changes to the Provincial Health Orders is employers struggling with getting their employees to return to their businesses after the continual layoffs (reduced capacities result in the need for less employees).

Although the number of individuals participating in the training and counselling was lower than we had hoped for, when there are only a few people in a training session, it becomes more like a counseling session. The trainer will focus on the businesses in attendance.

Webinars enjoyed strong attendance as they brought together a collective of voice, experience, regional representation and expertise for the benefit of tourism operators in short and engaging sessions.

Final programs delivered and recordings can be found at www.tiamanitoba.ca

2. Project Overview

The working group, who came together as colleagues, were keen to explore the feasibility of an industry association for tourism in Manitoba. From diverse sectors and regions, this group has vast experience in tourism, operating challenges, business opportunities, industry advocacy and association leadership. Their leadership in this project provided reputational and industry/governmental relationships to host this conversation and connect with essential funders and key partners.

Rationale:

- There are many sectoral organizations that advocate and support sectors in the province;
- There is no tourism-wide, industry-led advocacy voice for all sectors for Manitoba – as there is in every other province or territory in the country; and
- Travel Manitoba has led advocacy or information sharing and stewardship up to now.

The two Project areas included:

1. Feasibility, value, appetite of an industry and province wide association for tourism; and
2. Tourism development needs from industry to understand what kinds of training has been meaningful, at what level, and what do they envision needing going forward.

Some of our initial ideas to enhance the value proposition of a TIA in the province include:

- **Advocate:** addressing and strategizing with the industry and government, common issues and challenges impacting the visitor industry and economy in the province;
- **Communicate and lead public awareness of the value of the visitor economy to our Province:** through E-Newsletters and website, public campaigns, sharing and collaborating, to and from industry and governments;
- **Facilitate collaboration and regular engagement:** across partners, communities, sectors and the Province;
- **Conferences and Town Halls:** in the province (annually or as designed) to bring industry together, grow networks and relationships, strengthening the tourism industry and partnerships from the inside-out; and
- **Professional Development:** TIA's hold industry training events, connect the industry of MB to other Provincial and Territorial TIA's and generally provide a voice from in the trenches of entrepreneurs on the front line.

3. Methodology

As presented in the Introduction and Overview, two distinct projects each had to address the following questions, including but not limited to:

1. Is a TIA for Manitoba feasible, would it have value and what gaps or added benefits could it deliver to tourism stakeholders in the province?
2. What training or development programming is needed in Manitoba for tourism operators, and if developed, would there be good engagement and impact? Impact that could grow awareness of tourism trends, industry pivots from COVID, application of data and research, marketing in COVID times, and more.

All planning, research, survey design and communications were developed to ensure:

- Strong communications with key partners;
- Consistent information to all industry stakeholders;
- Approaches and events aligned or scheduled with consideration for other local, provincial and national events to avoid conflict and maximize impact or relevance; and
- A desire to ensure diverse tourism stakeholders from all regions in Manitoba knew that the ideal formula would complement or support the maximum number of provincial stakeholders in the industry.

Project One: Feasibility

To explore feasibility the project proposed:

- Examination and best practice research of operating models of TIA's in Canada;
- The collection of input from stakeholders via online survey examining insights, needs, gaps, experiences, opportunities, recommendations;
- The collection of input from stakeholders via online survey regarding tourism development and training needs, opportunities, priorities, challenges and gaps;
- One-on-One Interviews: with up to 15 industry leaders and stakeholders for their experiences, expertise, cautions, values, etc.; and
- Designing a Focus Group post-research to:
 - a. Begin engagement, design and development, should the survey and interviews conclude feasibility.
 - b. Bring stakeholders together to present findings and share weak results for feasibility, but discuss action plans or findings to address advocacy and an industry voice, in the absence of a positive feasibility.

Project Two: Tourism Development and Training

To explore the tourism training and development opportunities, research examined:

- Best practices from other TIA's, the Tourism Education Council, Travel Manitoba and other national tourism bodies deliver training and workshops for tourism
- The collection of input from stakeholders via online survey regarding tourism development and training needs, opportunities, priorities, challenges and gaps; and
- Design and implementation with evaluation of a tourism development and training program that is relevant to stakeholders and leaders, is responsive to the input from the industry in the online survey, and that could be delivered with the best timing available, marketed by all partners and evaluated for impact and continual improvement.

As a key component of this project, we needed to track how many participated in training and development, if new businesses were started, if business volume improved and if operators grew business and created new jobs. Where ever-changing COVID health regulations and restrictions impacted the labour market and tourism operations and visitation, these variables were not assessed as relevant results that demonstrated quality of programming. As you will note in the Executive Summary, there was value in the training for those that had time and capacity to engage, with the greatest impact being new information, new resources and a growing peer network in the province and Canada from which operators could continue their survival strategies through the pandemic.

As an example of initial targets, we estimated that of the 6,100 SME's in tourism, we hoped to engage with 2,000 operators and then obtain 25% registrations of those 2,000 businesses. We were hoping that 500 operators would engage and learn, using their new knowledge in their business, therefore impacting jobs and/or business expansion. Initial webinar attendance and workshop registrations is just under 100 unique registrations. The webinars are available on the tiamanitoba.ca website and further engagement could reach another 100 stakeholders. Though impact and inspire business is very difficult to track during these COVID times, future research projects with partners is very possible.

All development and training workshops are reported in the Executive Summary including registration numbers and assessment of impacts to operators and business knowledge.

4. Findings and Analysis

Supported by Project partners Travel Manitoba, the MB Chamber of Commerce and funders, a News Release was issued, and organizations shared the Project Launch and call to action for interviews or the online survey link within their distribution lists. The Press Release can be found in Appendix C. communications and online at tiamanitoba.ca.

Specific to the Tourism Training and Development focus, the Manitoba Tourism Education Council and Travel Manitoba made valuable contributions to the design and delivery of tourism development efforts.

Survey Results

It is estimated that over 5,000 operators, stakeholders or organizations received the News Release and call to action to participate in the online survey or participate in the tourism training and development opportunities. The Working Group, with input from partners, identified over 30 possible operators or organizations to have direct interviews with. The list was narrowed down to 12 and a proposed Focus Group would be held with a smaller group to share results and concerns in next steps. Of the 12 identified, 8 interviews were completed with the 4 outliers not being available at the time of the interviews.

Response from the industry panel and the sharing of results was 90% positive for TIA MB to go forward. Guidelines include affordability, relevancy and ensuring inclusion of all the voices for tourism in the province. Partnerships with MITA and key government and organizational partners will be essential to success.

A. Online Survey – Feasibility

While the complete report is available as a PDF of summary highlights, key input to determine feasibility included:

- 60% of respondents said there are key issues that a broader tourism association needs to tackle.
- 72% of respondents are currently members of a tourism regional or sectoral industry organization.
- 79% of respondents indicated that an industry organization for tourism to lead advocacy e.g.: labour shortages, funding, development and disruption, marketing, research, supports, etc. was rated 'urgent' or 'needed' to have.
- Key values in order of priority for a new TIA Manitoba must be: Advocacy, Member Benefits, Training and workshops, Networking and industry Conferences.
- Top priorities of a membership industry association must be: Communication, Advocacy and Networking
- Top advocacy priorities identified for priority included: marketing knowledge, labour market shortages, partnerships to diversify business and experiences, international market return, and the increased cost and availability of supplies.
- COVID had a significant impact on all respondents. The top areas of support that the industry needed to continue operating included Funding, Customers and Staff.

Closing comments to Online Survey:

This is worth exploring

Good survey

Thank you

A TIA MB is a right step forward

Make sure the discussion is broader for remote regions and diverse sectors

Ensure affordability

Thrilled to further engage

Great initiative

This is timely and worth doing

Wonderful news

A TIA would only help bring more value and support to the industry

A great initiative – I am very interested

B. One-on-One Interview Feedback: Feasibility

Themes gathered through one-on-one interviews with tourism stakeholders in Manitoba included:

Advocacy

- Provincial government bodies have value in an industry association for direct, industry-led representation into programs, strategic planning, partnerships, bringing the industry together, etc.
- Travel Manitoba governors know they can't advocate to other governments with the same value as an industry-association can.
- Insight suggests that red tape and industry is most needed in positively impacting public policy.
- Future issues for the industry, in 2022, will be where there has been a dependence on government funding, those resources will not be available forever and operators will be faced with very difficult choices in 2022.

Associations and Value

- Lead with a plan that is fluid and on-going. As TIA MB grows, members and stakeholders know and feel that they can participate, contribute or influence the early build-out days of the TIA MB.
- Industry Associations have weathered well in leadership through COVID, providing information, communications, engaging and advocacy with operators for relevant and impactful programs to support operators through the pandemic and into 2022.
- Some associations merged or morphed to a greater impact – outside of a sector or region – in support of effective and meaningful representation of a broader industry.
- Position the new association as a brain trust of industry experience to the benefit of the province, the industry and in advocacy.
- It is recommended that TIA MB talk about the value of a new association and membership as an investment, not an expense. The compelling proposition being a unified voice for the whole province, fostering tourism development and prosperity, in partnership with all stakeholders, for a vibrant visitor economy.
- Caution to not introduce redundancy in the marketplace – each organization that serves in tourism has their own leadership. Anything new needs to build on those mandates in support of an improved experience for the industry in the province.

Membership Benefits

- Province or Territory specific, there are many models and creative, value-added member benefit programs that also provide financial support to the operations of the association including in Saskatchewan, TIA SK has a unique energy program with negotiated energy rebates for members – therefore enhancing the value of a membership.
- There is a gap in Manitoba re: confidence in who leads product development for the province – a possible leadership role or partnership with Travel Manitoba.

Governance

- There may be an opportunity to build the model of governance for the TIA MB with consideration to the governance structure of Travel Manitoba, in regional and sectoral knowledge and expertise.
- The Manitoba Chamber of Commerce has been a valuable industry voice and leader in the absence of a tourism industry association.

C. Online Survey – Tourism Development

Themes gathered through the online survey with tourism stakeholders in Manitoba included:

- Workshops of interest, training needs and interests were very diverse – from entry level training to business management knowledge and advice.
- Ideas or areas for development or training included to all facets of marketing, funding, insurance, business operations advice, digitizing business, supporting or joining existing advocacy efforts, etc.
- That the Working Group must work with partners in tourism for Manitoba that are involved in training, workshops, information sharing, development of operators, businesses and experiences.

D. Tourism Development and Training Results, Impact and Evaluation

Implementing the Tourism Development and Training Program concluded a strong response to new information, great networks, the value of peer-to-peer networking, gratitude for an investment in development and training during COVID times and more.

Webinars

COVID and CHAOS – Webinar – September 22, 2021

Moderated by Eleanor Coopsammy, formerly of CTV News and with industry guests:

Jill Curran of Maxxim Vacations in NFLD;

Estelle Blanchett of Jasper Food Tours in Alberta;

Greg Elmhirst of Elmhirst Resort in Ontario;

and last but not least, Ibrahim “Obby” Khan, Food, former CFL Player, and Beverage and Buy Local Titan from Manitoba.

Take-aways from guest speakers and over 40 participants:

<p>“Stay focussed, collaborate, control what you can, remind yourself of purpose, lots to be grateful for, and no one eever want to do a Pandemic again!”</p> <p>“Grateful to be amongst other operators and share experiences during such a stressful time.”</p> <p>“It felt like a big family.”</p>	<p>“Appreciate hearing and learning from colleagues locally and nationally.”</p> <p>“So cool to learn from others with a national perspective.”</p> <p>“This was great.”</p> <p>“Can I share this with Economic Development Officers and rural tourism leaders?”</p>
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Data Driving Tourism – Webinar – January 19, 2022

Moderated by Patti Balsillie with industry guests:

Joel Waterman (He/Him) of Inn at the Forks,
 Paul Conchatre of Birdtail Waterfowl Inc.
 Marilyn Crewe Ec.D.(F) C.Ec.D. of Neepawa Tourism.
 Nik Nanos of Nanos Research,
 Meaghan Ferrigno of Destination Canada
 Jackie Tenuta of Travel Manitoba

During registration, participants were invited to complete two questions about proficiency and application of data and research in their business as well as confidence in their knowledge about where to find information from their own business, locally or nationally.

Question One - Proficiency in using data and research in business

PRE	POST
<p>55 Registered for the Workshop and before the webinar, when asked how strongly they agreed with being proficient and able to apply data and research into their business:</p> <ul style="list-style-type: none"> - 36% of respondents said they agreed with the statement - while 39% said they were neutral to the statement. 	<p>Of the 32 Participants, 9 Surveys completed post webinar, when asked how strongly they agreed with being proficient and able to apply data and research into their business:</p> <ul style="list-style-type: none"> - 55% agreed with the statement - while 33 % were neutral.

Therefore, we can infer that the webinar impacted confidence and knowledge in proficiency and application of data and research in business.

Question Two - Confidence in finding sources of data

PRE	POST
<p>55 Registered for the webinar and when asked if they had great confidence in finding relevant sources of data to inform business development - in my business, in the province or Canada.</p> <ul style="list-style-type: none"> - 39% said they agreed with the statement while 36% were neutral to the statement. 	<p>Of the 32 Participants, 9 Surveys Completed Post webinar, when asked if they had great confidence in finding relevant sources of data to inform business development - in my business, in the province or Canada.</p> <ul style="list-style-type: none"> - 66% agreed with the statement 11% strongly agreed and only 11% were neutral

Therefore, we can infer that the webinar impacted confidence in where to find relevant sources of data to inform business development - in their business, in the province or Canada.

MTEC Coaching and Workshops

One-on-One Coaching:

- Only 3 Tourism Businesses took part in the counselling sessions.
- 2 out of 3 of the businesses had several counselling/coaching sessions.

October 20, 2021 Marketing Your Business in Challenging Times

How to access the market and adjust your strategy, things to avoid getting creative and taking decisive action and positioning your business for recovery.

- 13 participants attended
- 4 Participants completed feedback evaluations:
All strongly agreed that the information presented in the session was relevant to their business, the session provided information that will increase their ability and confidence in their positions, found the trainer knowledgeable and the session was interactive and they could contribute or ask questions.

October 25, 2021 Innovation & Reinventing Your Business: Pivoting for the Short and Long Term Survival of Your Business

Training is about accurately understanding our current situation from multiple perspectives, how to access the situation and having a Plan B.

- 8 participants registered
- 2 attended the training session
- Neither completed the evaluations

November 16, 2021 Marketing Your Business In Challenging Times

How to access the market and adjust your strategy, things to avoid getting creative and taking decisive action and positioning your business for recovery.

- (No Registrations so moved to December 14)

November 18, 2021 Innovation & Reinventing Your Business – Pivoting for the Short or Long Term Survival of Your Business

Training is about accurately understanding our current situation from multiple perspectives, how to access the situation and having a Plan B.

- (No registrations so moved to December 15)

December 9, 2021 Courage to Face Fear & Confidence to Embrace Change

We need courage to do new things the first time around because the first time everything is new. Without courage we only do new things that are easy or feel we have no other option. Courage makes it possible to do something enough times to get some level of confidence and have a foundation for true self confidence.

- (Re-scheduled to January 14th due to low registrations)

December 14, 2021 Marketing Your Business In Challenging Times

How to access the market and adjust your strategy, things to avoid getting creative and taking decisive action and positioning your business for recovery.

- (6 participants) Feedback was very positive. All strongly agreed that the

information presented in the session was relevant to their business, the session provided information that will increase their ability and confidence in their positions, found the trainer knowledgeable and the session was interactive and they could contribute or ask questions.

December 15, 2021 Innovation & Reinventing Your Business – Pivoting for the Short or Long Term Survival of Your Business

Training is about accurately understanding our current situation from multiple perspectives, how to access the situation and having a Plan B.

- (Cancelled due to no registrations)

January 11, 2022 Change a Losing Game-How to Pivot to a Winnipeg Position With Innovation or Reinvention

Pivoting for the Short and Long Term Survival of Your Business

- (Cancelled due to lack of registrations)

January 14, 2022 Courage to Face Fear & Confidence to Embrace Change

We need courage to do new things the first time around because the first time everything is new. Without courage we only do new things that are easy or feel we have no other option. Courage makes it possible to do something enough times to get some level of confidence and have a foundation for true self confidence.

- (11 participants) Feedback was very positive. All of the participants strongly agreed that the information presented was relative to their business, the information presented will assist them in their business and their personal lives.

In conclusion, we believe the main reason for the lack of Tourism business owners and managers taking advantage of the free training and counselling was more likely a result of them working in their businesses to keep them operational. There has been a severe labour shortage in Manitoba. Many businesses are unable to operate to capacity as a result of not having enough employees. One of the impacts of the continual changes to the Provincial Health Orders is employers struggling with getting their employees to return to their businesses after the continual layoffs. (Reduced capacities result is the need for less employees)

Although the number of individuals participating in the training and counselling was lower than we had hoped for, when there are only a few people in a training session it becomes more like a counseling session. The trainer will focus on the businesses in attendance.

Webinars enjoyed strong attendance as they brought together a collective of voice, experience, regional representation and expertise for the benefit of tourism operators in short and engaging sessions. Final programs delivered and event recordings can be found at www.tiamanitoba.ca

5. Next Steps at November 2021

Partners and stakeholders are keen to see an effective, industry-led association for tourism in Manitoba. The engagement was extensive, survey results surpassed expectations, interviews were honest and valuable to challenges and opportunities, and from workshops and webinars, participants shared the value of a TIA delivering development work for the industry – led by industry.

Partnerships are essential. Collaboration is key. Critical to success is ensuring that the future of a TIA for Manitoba is shaped by the stakeholders and that the governance model is representative of the diverse sectors and regions in the province. Where TIA Manitoba's key value-proposition is advocacy and gathering the collective voice for the entire industry, effective inclusion engagement will be paramount.

While the Executive Summary articulates considerations going forward, the Working Group will need administrative support, a working budget to launch and to continue to develop governance policies and outreach.

The Working Group has secured administrative support for next steps but it is not a long-term plan nor is it sustainable without continued development of funding sources, membership value and a structure to operate within.

Potential key tactics include:

- Incorporating TIA Manitoba as a society in the province.
- Continue to build out the website and update Social Media and push these links to stakeholders and partners.
- Identifying go-forward financial support or resources e.g.: project based fees for service, administration fees, contribution agreements, in-kind donations or support, sponsorships, etc.
- Building a database for ongoing engagement including all contributors of these projects
- Coordinate a smaller focus group of key stakeholders and organizations to continue the dialogue and maintain momentum for the future of this organization
- Continue to implement the Learning Webinar series, leveraging hands-on experiences from operators at home together with thought-leaders and experts in sectors, regions and trends, etc.
- Begin to shape advocacy priorities through engagement with stakeholders during outreach and engagement – the early Focus Group format will be essential, starting with a larger body, strong facilitation and purpose and then narrow it down as direction helps the organization take shape.
- Consider leading an industry development strategy for the province that accomplishes many of the objectives of an industry-led strategy for the province – and with partners and stakeholders.
- All data that has been gather needs to be mapped and assessed for lessons and insights going forward – for training, advocacy, engagement successes, challenges, concerns and more.

Appendix A: Key Contacts

Working Group

Ben Gillies – Winnipeg Trolley Company	(204) 915-8623 ben@winnipegrolley.ca
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Project Administrator:

MB Chamber of Commerce	Chuck Davidson, CEO (204) 948-0100 cdavidson@mbchamber.mb.ca
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Contractor:

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Funding Contact

Francois Andrieu (WD/DEO) (aka PrairiesCan)	francois.andrieu@canada.ca
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Web Design

Handcraft Creative – Elbert Bakker	(204) 480-7510 handcraftcreative.com
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Appendix B: Survey Design

The results of this exercise need to tell a story and provide data to levels of interest, specific advocacy issues, training gaps and opportunities, diversity of sector input, etc.

It is therefore divided into 5 sections:

1. Demographics,
2. Advocacy - COVID recovery impacts and challenge and/or industry advocacy issues, needs or opportunities,
3. Perceived value or benefits from a TIA to industry,
4. Training and development opportunities and
5. Final Comments or Other.

Feasibility of a Tourism Industry Association of Manitoba

Thank you for making time to have your voice join dozens of other tourism industry stakeholders in Manitoba regarding the perceived and real benefits of an tourism industry, member organization. Manitoba is amongst the last provinces without a collective of the industry voice in public policy development and representation, in bringing the industry together to represent issues and opportunities to all levels of government, to having an industry-led approach to training and development needs in the province, and more.

The survey will address both feasibility and training and development needs, with the view to offer training and development or webinar events in response to what we learn here.

For examples of Tourism Industry Associations in the country, see:

- www.tiac-aitc.ca
- www.hnl.ca
- www.tiaalberta.ca
- and a video depicting the value of the visitor economy to the province:
<https://www.youtube.com/watch?v=82lhKTXaz9U>

Can we be better together than the sum of our parts?

Remember: Upon completion of this survey, enter for your chance to win a \$100 Gift Card of your choice by filling out name, contact information and your business or organization.

The Working Group for this initiative is a volunteer-led group and would like to acknowledge and thank Western Diversification, Travel Manitoba and the Manitoba Chamber of Commerce.

[Survey questions on following pages]

SECTION A: Demographic Info:

What is your primary sector?

- Accommodations
- Attractions
- Campgrounds
- Destination Marketing
- Education
- Festivals/Events
- Food and Beverage
- Inbound Tour Operator
- Indigenous Tour Operator
- Local Tour Operator
- Meetings and
- Conferences
- Sectoral Association
- Transportation
- Other, please specify:

What region to you operate in?

- Central plains
- Eastern
- Interlake
- Parkland
- Pembina
- Western
- Winnipeg

How long have you been a tourism operator in the province?

- 1-3 years
- 4-10 years
- 10 +
- NA

How many full-time staff/or full-time seasonal do you employ?

- 1-5
- 6-20
- 21-50
- 51 +

SECTION TWO: Advocacy and Recovery

COVID Impact and Recovery

How has COVID impacted your business?

- Slight increase
- Significant increase
- Slight decline
- Significant decline
- No change
- Out of business

Other comments?

Do you have a recovery plan?

- Yes / No / Other

What do you need to continue to operate?

- Funding or financial support
- Customers
- Employees
- Housing for staff
- Pivoting business model
- Other

What percentage of current business relies on local or domestic tourism markets for revenues?

- 0%
- 25%
- 50%
- 75%
- 100%
- Comment:

A Tourism Industry Association for Manitoba:

Are you currently a member of a tourism or trade organization now?

- Yes / No / Other

If no, can you explain why not?

If Yes, which ones, other or NA

- | | | |
|---|--|--|
| • Association of Manitoba Museums (AMM) | • Manitoba Lodges and Outfitters Association (MLOA) | (e.g.: MBCoC) |
| • Canadian Chamber of Commerce (CCC) | • Manitoba Restaurant and Foodservices Association (MBRFA) | • Regional or Sectoral Tourism Association (RTA) |
| • Indigenous Tourism Association of Canada (ITAC) | • Manitoba Rural Tourism Network (MRTN) | • Tourism Industry Association of Canada (TIAC) |
| • Manitoba Indigenous Tourism Association (MITA) | • Provincial or Municipal Chamber of Commerce | • Other |
| | | • NA |

If you are a member of any of the above associations, why are you a member and what is the value?

- | | | |
|----------------------|----------------|--------------|
| • Advocacy | information | • Networking |
| • Benefit Programs | • Training and | • Other |
| • Communications and | Development | • NA |

What could be the value to the Manitoba tourism industry of an collective voice for tourism advocacy in the industry for the Province or Canada?

Have they ever had issues that they needed advocacy support?

- Yes/No. and if Yes or Not, Open book – please describe or explain

If there was a collective industry voice, what top issues or challenges that a TIA could address in advocacy, that impact your business today? Click only those that apply.

- | | | |
|--|---|--|
| • Affordable Housing for Employees | • or loss of staff | Business |
| • Costs related to meeting COVID-19 safety protocols | • Low cash flow | • Training and Development gaps for Team |
| • High debt load | • Marketing knowledge | • Unable to pay rent |
| • Increase cost of supplies | • No international visitors | • Other |
| • Insolvency or bankruptcy | • Partnerships to diversify operations or experiences | • Please explain |
| • Labour market shortages | • Training and Development gaps for | |

What do you want the Working Group for this project tounderstand or know in the development of a new Tourism Industry Association? E.g.: costs, representation, time, etc.

- OPEN BOOK

SECTION THREE: Benefits from Membership

A TIA can facilitate programs, advocacy, benefits, communications, etc. In order of priority, rank the following re: what would bring the most value to your business:

- Advocacy – labour, funding, development and disruption, marketing, research, supports, etc.
- Industry conference – annual or bi-annual to celebrate, network and learn together
- Information and updates – newsletters, webinars, etc.
- Member benefits like collaborative marketing, discount programs, insurance, etc.
- Networking and collaborative opportunities
- Training and workshops – foundations of business, service, digital marketing and social media, the analysis of research, etc.
- Other

SECTION FOUR: Training and Development

Available in Manitoba and in Canada, there are many resources and programs offered through organizations in training and business development. Examples include:

- There are many front line service, guiding, and food and beverage certifications through EMERIT and Tourism HR Canada.
- The Manitoba Tourism Education Council working with EMERIT and Tourism HR Canada, also delivers training in business skills, customer service and retail, and ambassador programs.
- Travel Manitoba supports business resources including advocacy toolkits, strategic and marketing plans.
- Chambers of Commerce and other industry or business organizations host speakers and conference bringing learning and training opportunities to business in Manitoba including staying competitive, sustainability in business, labour market insights and more.

What training or professional/business development have you participated in for yourself or your business or team in the past 24 months?

Did it support or advance your learning, knowledge or business development needs?

What training or professional/business development do you need to support yourself, your business or team in the next 24 months?

What is the greatest impact you hope to gain from this training?

Which of the following top three training programs would you find value in for yourself, your business or your team? TOP THREE only and open text for OTHER

- Business Resiliency and pivoting
- Destination Development or Management
- Digital Marketing – web, social media, etc.
- Experience Development – in culinary, wilderness, accommodations, food and

- beverage, etc.
- Finding and retaining staff
- Foundational business skills – bookkeeping, records management, taxes, etc.
- How to Pivot through COVID and into recovery
- Inclusion and Accessibility in the industry
- Indigenous Tourism Development and Partnerships to grown tourism
- Marketing through COVID recovery
- Navigating Insurance impacts to business post COVID
- Partnership Development in tourism
- Pricing and Packaging
- Regional Marketing Development
- Sectoral Leadership Series – Learning from the trenches of successful businesses in Manitoba and Canada
- Social Media tools and skills
- Other?

SECTION FIVE: Closing thoughts, remarks, concerns, opportunities

Appendix C. Communications Planning and pieces

Communication Objectives

This section identifies known questions that will need proactive messaging to keep all audiences informed, engaged and aware of next steps and/or key contact information.

- What is the Project
- Who is the volunteer Working Group
- What are the timelines and deliverables
- Who is funding this project
- What are the next steps
- How do people engage
- Where is the survey and what is its purpose
- Is there a web presence such as a website or social media presence
- What are the tourism development programs and are they free
- What is happening next and how can I be involved

Audience and Partners, Stakeholders

MB Chamber of Commerce - has been very supportive of implementation, hosting this project, supporting in-kind contributions through administration and invoice payment and contract management and oversight. They have indicated flexibility or openness to hosting 'launch' conversations or operational models that could support TIA MB should it be determined as feasible, in the first few years. They also have an industry newsletter to support communications and outreach on this project.

Travel Manitoba is open, generous, collaborative of this conversation and has shared information, circulated communications, opened discussions about future cost or expense off-setting should a TIA MB take over costs related to conference, training, etc. They also have an industry newsletter to support communications and outreach on this project.

Manitoba Tourism Education Council (MTEC) – leader in EMERIT tourism certification and other workshops responsive to industry needs and developments. They also have an industry newsletter to support communications and outreach on this project.

Tourism Regions – Place Brands of Manitoba – valuable in representing diverse regions of the province and important to ensuring broad and diverse engagement.

Tourism Sectoral and Regional Associations – established for marketing, product development, advocacy, networking, conferences and sharing, some of these organizations have been in place for a very long time with established memberships and successful advocacy efforts. Their contributions will be valuable while equally ensuring they see value and support should a TIA be deemed feasible.

Tools

- **SurveyMonkey** - The reach of the survey to stakeholders in the province is likely excess of 6,000. Response rate final was 155 and data in responses was rich. Thank you Travel Manitoba for organizing the responses in excel into themes to better interpret the data.
- **Interviews** - 8 of 12 Interviews were completed in total – the final 4 were not available or were not responsive. A focus group will be hosted post final report to test assumptions and invite dialogue and input to the next steps – membership, governance, primary purpose and roles, partnerships, membership, revenue generation, etc. This can be held in tandem with the interim project manager for TIA MB, Karen Kingsland.
- **ZOOM Online Meetings to present results** – in late September 2021, the Working Group presented the results of the feasibility research to the industry (Video link can be found at tiamanitoba.ca) with approximately 30 participants joining the presentation and discussion.
- **TIA MB Webinars online and MTEC led Workshops online (ZOOM)** - Marketing and promotions done through partners email lists, social media (Facebook and Instagram) and websites.

Launch Press Release: Through Working Group Members, MB Chamber of Commerce, Travel Manitoba and MTEC

Tourism Stakeholders in Manitoba Explore Feasibility of Industry Association

August 9, 2021 - Formed in 2020, a working group of provincial tourism industry colleagues is exploring the feasibility of forming a tourism industry association in Manitoba. The working group is now commencing industry engagement to determine the viability, interest and appetite for a new industry organization for tourism in the province, the Tourism Industry Association of Manitoba (TIA Manitoba).

“The Government of Canada recognizes that tourism businesses are key economic drivers in Canada, often outpacing more traditional industries,” says the Honourable Mélanie Joly, Minister of Economic Development and Official Languages, and Minister responsible for Western Economic Diversification Canada. “As we navigate this road to economic recovery, we will continue to engage with tourism businesses so they have the appropriate supports needed to welcome visitors back once it is safe to do so.”

“Tourism is amongst the hardest hit industries by the pandemic,” says John Gunter, spokesperson of the working group and President & CEO for Frontiers North Adventures. “We are grateful to Travel Manitoba and the Manitoba Chambers of Commerce who in recent years have graciously in-part represented our interests. Now more than ever, all stakeholders in Manitoba’s tourism industry need to come together to identify priorities and develop policy to hasten our recovery.”

“Travel Manitoba welcomes the efforts of the TIA Manitoba Working Group as another ally on the road to full recovery for the tourism industry”, said Colin Ferguson, President and CEO of Travel Manitoba. “The successful implementation of the new Manitoba Tourism Strategy will depend on the alignment of efforts toward common goals, and

working together to build back better than before.”

The next step for the TIA Manitoba working group is to connect, engage and learn from as many tourism industry operators as possible. Feasibility and development opportunities will be determined from this first phase, with a completion date by the end of August 2021.

To kick-off engagement and next-steps for this proposed association and its feasibility, a survey has been created for the tourism industry in Manitoba to contribute to. To connect with the working group, link to the survey and stay tuned to project updates, a TIA Manitoba website and Facebook page have also been established.

The TIA MB Feasibility Working Group is grateful for project support from The Government of Canada through the Regional Relief and Recovery Fund (RRRF) and together with support provided from the Manitoba Chambers of Commerce.

TIA Manitoba working group members include:

- Ben Gillies - Winnipeg Trolley Company
- Caleigh Christie - Falcon Trails Resort
- John and Merv Gunter - Frontiers North Adventures
- Karly McRae - Lakehouse Boutique Hotel
- Pit Turenne - Aikens Lake Lodge

-30-

For more information on the Working Group, contact:

John Gunter, Chair, TIAMB Working Group

john.gunter@frontiersnorth.com

(204) 949-2050

For more information about the Project and how to engage, contact:

Patti Balsillie, Project Lead

project@tiamanitoba.ca

(867) 334-2522

Appendix D. Sample DRAFT Terms of Reference

Name: TIA MB Working Group – to evolve to Inaugural TIA MB Board of Directors

Date Effective: November 2021

Purpose:

To lead and provide oversight to the feasibility, training research and implementation project funded by WD for an industry association for the province and a training program to target key gaps and opportunities in tourism training as expressed by the industry and from research of current training available.

Authority:

While members of the WG may provide feedback or review of key pieces, the committee will meet over the course of the project to received updates, provide input or feedback and to finalize the plans, reporting and outcomes from this project. The Project Administrator, MB CoC will have authority over invoicing, payments and reporting, with the contractor and the WG Chair.

Accountability:

All meetings and discussions are recorded (in writing) and there will be a close working relationship with the funder, the project administrator (MB CoC) and Travel Manitoba.

Objectives:

- To introduce the Projects – 1 and 2 and to inspire engagement to help shape both projects
- To determine the feasibility of a TIA for Manitoba
- To collect understanding of challenges, opportunities, gaps and interests for training and capacity development with implementation and evaluation, to the broadest audiences possible while leveraging skills and resources to the fullest extent from the province.

Meetings:

See Work plan milestones – Meetings will be scheduled within one week of milestone completion dates.

Communication:

- Internal: The WG and administrator will communicate by email, online Zoom, phone or in person. All meetings and decisions need to be recorded for accountability.
- External: Updates and next steps to the project will be uploaded to the TIAManitoba website, social media and with partners in their news releases.

Financial Reporting and requirements – working with MB CoC and Funder.

Review:

Should feasibility be determined, the WG will need to map out next steps from experiences and lessons learned to continue.

- Board Structure
- Bylaws for TIA MB