



# Destination Area Assessment Northwest, Manitoba

Western Management Consultants

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# Table of Contents

<u>Title</u>	<u>Page #</u>
1.0 Introduction .....	1
2.0 Assessment: The Tourism System in Northwest, Manitoba .....	2
2.1 The Tourism System: A Perspective .....	2
2.2 The Supply Side: Sectoral Base.....	3
2.2.1 Location .....	3
2.2.2 Natural Features Base.....	4
2.2.3 Transportation and Access.....	6
2.2.4 Attractions Base .....	11
2.2.5 Accommodations Base .....	14
2.2.6 Restaurant Base .....	18
2.2.7 Retail/Service Base.....	19
2.2.8 Events Base .....	21
2.2.9 Tourism Information and Promotion.....	21
2.2.10 Infrastructure .....	22
3.0 The Demand Side: Markets and Forecasts.....	24
3.1 Market Situation and Characteristics .....	24
3.1.1 National and Regional Economy.....	24
3.1.2 The Northern Regional Economy .....	24
3.1.3 The Northwest Economy .....	27
3.1.4 Regional Tourism Economy .....	27
3.2 Target Markets for the Northwest .....	28
3.2.1 Long-Term Tourism Forecasts.....	29
3.2.2 Potential Markets.....	29
3.3 Competitor Assessment .....	32
4.0 Tourism SWOT Summary for the Northwest .....	40
4.1 Flin Flon SWOT .....	40
4.2 The Pas SWOT.....	41
5.0 WMC's Recommendations .....	44
Recommendation 1: Improve the hub community of The Pas/OCN to better receive and support tourism from AE and CE markets.....	44

Recommendation 2: Improve Flin Flon as a tourism destination and regional hub community.....	44
Recommendation 3: Improve Snow Lake as a tourism hub community.....	45
Recommendation 4: Improve Cranberry Portage as a tourism stopping point community.....	46
Recommendation 5: Improve highways in the area by upgrading to tourism quality roadways in the areas identified. ....	46
Recommendation 6: Ensure provincial parks operate in support of tourism in addition to local camping and recreation.....	46
Recommendation 7: Improve the measurement of tourism.....	47
Recommendation 8: Improve marketing of the entire region collectively and entrepreneurial initiatives individually. ....	47



## 1.0 Introduction

WMC was retained in the spring of 2018 to conduct a destination area assessment for three destination areas in Northern Manitoba as identified in the Northern Manitoba Tourism Strategy (2017). The three destination areas are:

1. Thompson and area;
2. Northwest Manitoba (The Pas/Opaskwayak Cree Nation (OCN), Flin Flon, Snow Lake, Cranberry Portage); and
3. Churchill and area.

The research and assessment process involved the following key steps:

- Desk research to identify the components of the tourism systems in each destination area;
- Focus group research with Travel Manitoba professionals to address the Strengths, Weaknesses, Opportunities and Threats (SWOT analysis) from a destination development perspective;
- Site inspections of each destination by WMC professionals to validate the SWOT analysis and identify other gaps and opportunities;
- Focus the assessment from the perspective of the needs of two markets for Manitoba. The Explorer Quotient (EQ) methodology of Destination Canada identifies two EQ markets of Cultural Explorers (CE) and Authentic Experiencers (AE) that are well matched to Manitoba's offerings. Travel Manitoba seeks to attract these markets, and northern destination areas will be assessed primarily in terms of the expectations of these markets.
- Identify gaps, opportunities and recommendations of the WMC consulting team; and
- Report the findings.

The key audience for this assessment is the Northern Manitoba Tourism Steering Committee.

The process began in early May 2018 and will conclude with presentations to the Steering Committee in September 2018.

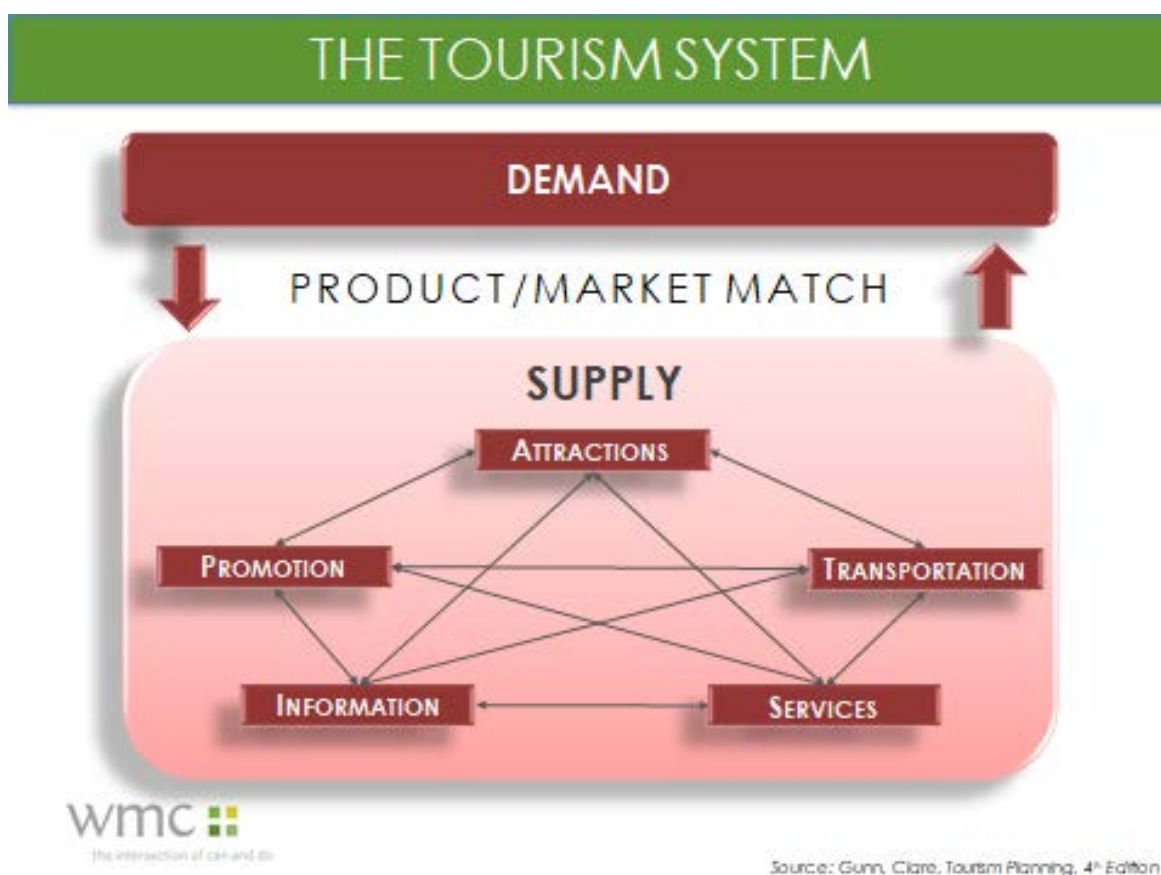
This report focuses on the tourism system in the Northwest Destination Area.

## 2.0 Assessment: The Tourism System in Northwest, Manitoba

### 2.1 The Tourism System: A Perspective

The tourism sector is a small but important component of the regional economy. While **not an international export product**, regional leisure tourism is important to many communities around Northwest Manitoba – the towns, villages and service centres that support them.

A particular analytical model is used to look at the tourism system, characterized in Figure 1. This graphic illustrates that the product/market match is arrived at for any destination by considering components of both the demand and the supply side of tourism. The sections following consider both demand and supply for the Northwest Destination Area.



Source: Gunn, Clare, Tourism Planning, 4<sup>th</sup> Edition

Figure 1

## 2.2 The Supply Side: Sectoral Base

The supply side of tourism consists of interrelated factors such as attractions, tourism services and transportation, and how they are communicated through information and promotion.

The Northwest region is a vast area of lightly occupied wilderness lakes and waterways that have excellent potential for recreation and tourism. Part of the region is in Canada's Precambrian shield, offering a landscape of lakes and waters that are different than other areas in Canada's west and north.

This region has beautifully developed provincial parks and protected areas. Campgrounds provide services for recreational vehicles (RVs) and offer large, clean sites; excellent washroom facilities with showers; and other amenities such as boat launches, playgrounds, interpretive centres and amphitheatres, and outdoor education programming. These campgrounds are located on some of the best lakes in the region. They are used primarily by Northern Manitobans.

Northern Manitobans enjoy a very special relationship with their provincial parks and campgrounds. Northern campgrounds offer seasonal RV camping at very affordable rates, and almost half the campsites are allocated to seasonal use. Northern Manitobans highly value this situation and would not want it to change. This blessing to Northern Manitobans presents, or will present, its own issues if Manitoba chooses to move forward towards more tourism attraction in the North.

For those who love the outdoors; for those who snowmobile and quad, or boat and camp; and for those who love sparsely occupied wilderness, this Northern region is home. The natural heritage of the region is its major asset and its major draw from a tourism perspective. It is competitive on the Canadian stage at the very least and has remained relatively undeveloped due to its distance from major markets.

### 2.2.1 Location

The Northwest area includes communities within Census Division 21. There are four primary tourism sites in the area: Cranberry Portage, Flin Flon, Snow Lake, and The Pas/Opaskwayak Cree Nation (OCN). Tourism information for Wanless, Cormorant, and the Rural Municipality of Kelsey was also included in this assessment.

Cranberry Portage is a local urban district in the Rural Municipality of Kelsey. It has a young population of 771 people with a median age of 31.6.<sup>1</sup> This small community has a beach and lake access, ample parks and playgrounds, and provides a desirable lifestyle for its small population.

The **City of Flin Flon** is home to 5,185 people, 203 of whom live in across the border in Saskatchewan making Flin Flon one of only two cross-border communities in Canada. Flin Flon is

<sup>1</sup> Statistics Canada (2016). *Census Profile, 2016 Census*. Available at: <http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/index.cfm?Lang=E>

a classic Precambrian shield community, with winding roads through rocky terrain, houses perched on rock outcrops, Ross Lake in the middle of town, and a mining tradition clearly evident with the Hudson Bay Mining and Smelting Co. stack and mill located at the edge of the downtown.

The Town of Snow Lake hosts 899 residents. With a slightly older demographic, the town encourages retirees to move to the community and 18.9% of the population is over 65. Snow Lake has limited amenities in the town and boasts a beautiful northern lake as its backdrop and recreational playground. Locals enjoy boating, fishing, quads and snowmobiles in this year-round outdoor recreation community.

The Town of The Pas is one of the oldest settlements in Manitoba. It is the largest centre in the Northwest with a population of 5,369. Boasting one of the three true blue lakes in existence outdoor adventure abounds.

The Opaskwayak Cree Nation (OCN) is historic gathering place where Saskatchewan meets the Pasquia. It borders The Pas and the Rural Municipality of Kelsey. OCN is home to 3,034 residents across its five Manitoba census subdivisions.

The Pas/OCN is the economic centre of its region, serving business and personal needs for the surrounding population. The nearby Clearwater Lake with resorts, RV Parks, and provincial parks and campgrounds provides an outdoor recreation playground for locals.

### 2.2.2 Natural Features Base

The Northwest area offers many natural features including:

- Lakes Resources:
  - Lake Athapapuskow
  - Barbe Lake
  - Clearwater Lake
  - Herb Lake
  - Kississing Lake
  - Korman's Lake
  - Osborn Lake
  - Reed Lake
  - Rocky Lake
  - Simon House Lake
  - Snow Lake
  - Tramping Lake
  - Wekusko Lake



Most lake resources are good fishing resources, with a variety of species providing sport and food for local people and for visitors.

- Rivers:

- Carrot River
- Churchill River
- Grass River
- Saskatchewan River

River resources in the region may provide opportunity for outdoor recreation development.

- Geological, geomorphological and geographic features:

- Canadian Precambrian Shield
- Transition to the Canadian Shield
- The Pas Moraines
- Leak Lake (Iskwaskum Park)
- Caves at Clearwater Lake
- Purple Beach at Snow Lake
- Purple Beach at Clearwater Lake
- Devils Staircase at Cross Lake (rock formation)
- Wekusko Falls (Wekusko Falls Provincial Park)

- Natural features with historic significance:

- Aboriginal pictographs (Grass River)
- Carrot Valley farming area (The Pas, first wheat in Western Canada grown here)

- Wildlife, habitats and natural features with tourism significance:

- Aurora borealis
- Walking path – Flinty's Trail and Boardwalk (Flin Flon)
- Devon Park walking paths (The Pas)
- Grace Lake (The Pas)
- Hapnot Lake Wildlife Sanctuary
- Sakeram & Tom Lamb Wildlife Management Areas



- Ecosystems protected by wildland parks in the region:

- Bakers Narrows Provincial Park
- Clearwater Lake Provincial Park
- Cranberry Portage Park
- Grass River Provincial Park



- Wekusko Falls Provincial Park
- Pasla Hazel Ecological Reserve
- Opaskwayak Cree Nation Salt Channel
- South Moose Lake
- Tom Lamb Wildlife Management Area
- Saskeram Wildlife Management Area
- Cormorant Area of Special Interest
- Red Deer Lake Area of Special Interest

The natural features base of the immediate region is interpreted in parks and protected areas. The provincial parks provide excellent education, young persons' programming, ecological interpretation, and natural heritage orientation for locals and visitors alike. They preserve, protect and present the natural heritage of the region in a professional manner, and Manitoba Parks as an organization, represents a major asset to the region.

#### 2.2.2.1 WMC Assessment

- The lakes and rivers of the area are lightly developed, highly scenic and clean. Clearwater Lake in particular is apparently one of the clearest lakes in North America. While the lakes are high quality fishing lakes, the shorelines in many cases lack accessibility, beaches, campgrounds or landing places. These boat accessible sites could be developed over time.
- Some man-made infrastructure has been developed to access and present the natural heritage of the region; walking paths in many urban areas, paths and bridges at Wekusko Falls, and others are examples. However, in destination terms the regional assets are relatively undeveloped at this stage. Planned upgrading and development to access and present heritage assets will be required to host more of the EQ markets of Cultural Explorers (CE) and Authentic Experiencers (AE) that Manitoba seeks to attract.
- Natural resources are clearly the tourism attractor in this Northwest region.

#### 2.2.3 Transportation and Access

The Northwest is accessible by air, rail and roads.

- Air access in the region:
  - Calm Air
  - Mississippi Air
  - Cranberry Air (Charter)
  - Fast Air (Charter)
  - Gogal Air (helicopter and fixed wing Charter)
  - Midwest Helicopters (Charter)
  - Perimeter Aviation (Charter)
  - Wings over Kississing (Charter)

- Scheduled flights, frequency, capacity, cost:
  - Calm Air:
    - Once daily flights between Flin Flon to/from The Pas (\$185.85/\$206.85)
    - Twice daily flights between Flin Flon to/from Winnipeg (\$858.90/\$885.15)
    - Twice daily flights between The Pas to/from Winnipeg (\$808.50/\$813.75)
  - Missinippi Air:
    - Twice daily (weekdays) and once daily (weekends) flights between The Pas to/from Pukatawagan (no prices listed). Air service from Pukatawagan to The Pas and then on to Winnipeg was announced recently.
- Airports and float plane bases in the region:
  - Flin Flon Airport:
    - Located 20 kilometres southeast of Flin Flon.
    - Serves as a tanker base for Ministry of Sustainable Development water bombers.
    - One runway (5,004 x 150 feet) constructed of asphalt.
  - The Pas Airport:
    - Located 19 kilometres northeast of The Pas.
    - One runway (5,901 x 150 ft) constructed with asphalt.
  - Grace Lake Airport:
    - Located one kilometre from The Pas.
    - Home to The Pas Flying Club hangers and clubhouse, and a local airplane mechanic.
    - Two runways, both constructed with gravel (3265 x 50 ft, 2853 x 50 ft).
    - Home to Missinnipi Airways.

Scheduled flights between Winnipeg and towns in the region are approximately one and a half to two hours long.

- Rail access

- VIA Rail (The Pas)

- Arriving from Winnipeg on Wednesdays (Economy \$156.45)
    - Departures to Thompson/Gillam on Wednesdays and Sundays (Economy \$67.20/\$106.05)
    - Arriving from Thompson/Gillam on Mondays and Saturdays (Economy \$67.20/\$106.05)
    - Departures to Winnipeg on Tuesdays (Economy \$156.45)



- Road access

The Pas/OCN is serviced from Highway #10 which runs north and south through the community. It connects to Highway #60 and then to Highway #6 to provide access to Winnipeg and other points in Manitoba. The drive from Winnipeg to The Pas is approximately six hours and 30 minutes (762 km).

Highway #10 proceeds north from The Pas/OCN to Flin Flon (136 km) where it terminates.

Access from Alberta and Saskatchewan is via Saskatchewan Highway #3 which becomes Manitoba Highway #77 at the border, intersecting Highway #10 about 149 km south of The Pas/OCN. Alternative access to the Northwest region is through Saskatchewan Highways #106 and #120 running northeast from Prince Albert to Creighton and Flin Flon. Highway #55 to Hudson Bay, Saskatchewan is another alternative access route from the west. Finally, access north off the Yellowhead Highway is possible using Manitoba Highway #83, #266 and then Highway #10 northbound.

- Bus service – scheduled:

- Greyhound Bus Lines:

- Once daily service between Flin Flon/Cranberry Portage/The Pas to/from Winnipeg (\$159.50 each way), a service which will end in October 2018.

- Kelsey Bus Lines (Charter)

- Snowmobile trails:

- Well established from The Pas south to Swan River
  - Well established from The Pas to Flin Flon
  - Flin Flon is not connected to Saskatchewan snow mobile trails
  - Cranberry Portage not connected to Snow Lake (project in progress)

- Snow Lake is connected to Thompson
- Signed and mapped by SnoMan Trails

There are extensive, signed snowmobile trails connecting communities in the Northwest and connecting Snow Lake and Thompson, and The Pas and Swan Lake. The remaining connection between Snow Lake and Cranberry Portage/Flin Flon is being planned and negotiated this year. Once in place, a continuous trail system will exist between Thompson and the Northwest region. There are no snowmobile connections to Saskatchewan.



Quad trails are informal in the area:

- One operator, Rocky Lake Resorts (Wanless), offers guided quad rides.

#### 2.2.3.1 WMC Assessment

- **Air access to the destination area is expensive**, as it is for all remote destinations. There are convenient scheduled flights with reliable operators. There are many charter services in all communities, providing convenient tailored air access to more remote areas of the region.
- Rail access is scheduled and less expensive. The issues with the Churchill connection do not impact service to the Northwest region, although the drop-in train passengers to Churchill affects the tourism opportunities in the Northwest in some ways.
- Road conditions were a focus of this assessment. WMC drove a 24-foot motorhome throughout the region, assessing road conditions from the perspective of the RV owner. We make the following assessment of the condition of regional roads in relation to rubber tire traffic to the region.
  - Saskatchewan Highway #3 is a paved highway with limited gravel shoulders and few pull offs between Hudson Bay, Saskatchewan and the border with Manitoba. The condition of broken and repaired asphalt creates challenges for larger RVs but no major issues for car and truck traffic.
  - Manitoba Highway #77 from the border to Highway #10 is in moderate/poor condition without paved shoulders and with no planned rest areas. Part of this roadway is under construction, so it may be planned for a very necessary upgrade in the near future. The roadway is not desirable for RVs, but it is short and can be endured.
  - Manitoba Highway #10 from the junction of #77 north to The Pas is a recently upgraded highway with wider gravel shoulders. While it is designated a scenic highway by Manitoba, there are very limited viewpoints or rest areas, and along this stretch of



roadway the terrain is not particularly scenic. Signing along this route is disappointing. There is a lack of international tourism signing. There is no indication at the Highway #77 turnoff that the next fuel stop is 149 kilometres north, or that fuel can be found a few kilometres south. This is basic information signing for the public.

- The Overflowing River Provincial Park and campground is very poorly marked, and signage needs to be upgraded on the highway and at the access point.

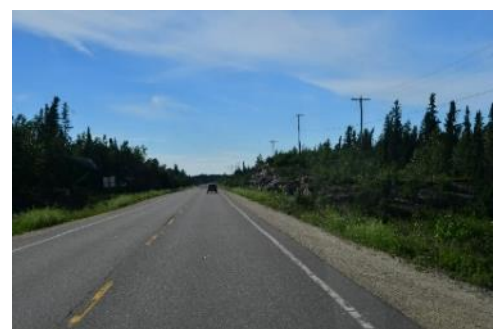
- Highway #10 from The Pas to Flin Flon is generally in good condition with gravel shoulders and with few frost heaves. However, few rest stops or viewpoints have been created along this road. Access to Clearwater Lake Provincial Park is well-signed and the roadway is being upgraded this summer. Access to Rocky Lake through Wanless is less well marked and could be improved. There are issues with graffiti



on rock outcrops along the highway, but this is an issue which is very difficult to deal with and exists in many destination areas. The Precambrian shield transition and landscape as you drive north to Bakers Narrows and Flin Flon is scenic and the access to Grass River Provincial Park and to Bakers Narrows Provincial Park are well-marked although not in the international highway marking convention (blue and white symbols instead of brown signing).

- There are no garbage issues along Highway #10 that stood out relative to highways in other places.

- Highway #39 from the Highway #10 turnoff to Reed Lake is in acceptable condition with gravel shoulders and few frost heaves. From Reed Lake, to the Highway #392 turnoff, to Wekusko Falls Provincial Park and Snow Lake, the road is in relatively poor condition causing a slowing down of RV traffic. Broken pavement, frost heaves and grooving from heavy truck use is characteristic. From Highway #392 to Ponton (62 kilometres) the road condition is similar, with broken pavement, gravel shoulders, and few pull offs.



- Highway #392 north to Snow Lake is in poor condition with large frost heaves and damage from heavy truck traffic. While an RV can manage this roadway, it will operate at a slower speed. Shoulders are narrow and gravel, and there are no planned stopping points or viewpoints on this road.

It should be noted that this assessment reflects at-point-in-time assessment of road conditions from a tourism viewpoint. It reflects how frustrated the tourist, and in particular the RV tourists, might be with road conditions on the day these roadways were travelled. Work was being done in many areas on these roads during the visit, so they are not being ignored. Having said this, road conditions are being compared to the desirable road conditions the market would expect in a comparable destination trip.

## 2.2.4 Attractions Base

Natural features of the region, and the protection and interpretation of those features are the central draws for tourism to the area. Other major attractors in the area include:

- **Aseneskak Casino (Star Attraction)** – Nestled gently into the trees that surround Opaskwayak Cree Nation, the Aseneskak Casino features gaming facilities, entertainment, nightlife, and the Eagle's Nest Restaurant and Lounge.
- **Sam Waller Museum (Star Attraction)** – A portal to the past, the Sam Waller Museum showcases the rich and diverse history of The Pas and the strange and eclectic curiosities collected by Sam Waller.
- **Snow Lake Mining Museum (Star Attraction)** – The Mining Museum has authentic exhibits of heavy-duty mining equipment, including jackleg drills, battery-powered trammers, and rocker shovels. Exhibits include mock-ups of mining drifts and raises, and a mine rescue centre. The museum was designated a "Manitoba Star Attraction" in 2006.

Attractors are those attractions that are strong enough to be "main trip purpose" attractions. Supporting attractions are equally important, providing additional reasons for visitors to come to a destination and to remain longer.

Table 1: THE ATTRACTIONS BASE: MAJOR ATTRACTIONS IN THE REGION		
Name	Visitation	Location
Flin Flon Station Museum	1,500	Flin Flon
Flin Flon Walking Paths	Visitation not tracked	Flin Flon
Flinty Statue	Visitation not tracked	Flin Flon
Northern Visual Arts Centre	5,871	Flin Flon
Aseneskak Casino	Data not available	Opaskwayak Cree Nation
Round the Bend Farms (Farm Gate Tours)	Visitation not tracked	Rural Municipality of Kelsey
Snow Lake Mining Museum (Star Attraction)	1,356	Snow Lake
Cranberry Portage Museum	Data not available	Cranberry Portage
Charlebois Chapel	50	The Pas
Christ Church Anglican – Franklin Rescue Expedition Pews, Cree Panels	9,000	The Pas

Table 1: THE ATTRACTIONS BASE: MAJOR ATTRACTIONS IN THE REGION		
Name	Visitation	Location
Lido Theatre	Data not available	The Pas
Sam Waller Museum (Star Attraction)	3,250	The Pas
The Pas Railway Station	Data not available	The Pas
Trappers Statue	Visitation not tracked	The Pas
Source: WMC Research, 2018		

The attractions base cannot be converted to *an experience* for tourists without quality interpretation by professional operators. The Northwest has many tour operators with highly professional tour guides, naturalists and interpreters.

Table 2: THE ATTRACTIONS BASE: REGIONAL TOURISM OPERATORS	
Name	Activities
Carpenter Clearwater Lodge (Clearwater Lake)	Fishing, waterfowl hunting.
Lockhart's Landing (Clearwater Lake)	Fishing.
Cormorant Lake Lodge (Cormorant)	Fishing, bear and waterfowl hunting.
Aberdeen Lodge (Cranberry Portage)	Boat and motor rentals, guides.
Caribou Lodge Outfitters (Cranberry Portage)	Fishing for northern pike, walleye, brook, rainbow and lake trout. Hunting for non-resident bear. Ice fishing packages. Rent cabins, boats, snowmobiles and quads.
Viking Lodge (Cranberry Portage)	Fishing, black bear hunting.
Evergreen Resort (Clearwater Lake)	Fishing, black bear hunting.
Bear Claw Outfitters (Snow Lake)	Fishing, black bear hunting.
Wilderness Outfitters Ltd. (Snow Lake)	Moose hunting.
M&M Outfitting (The Pas)	Hunting guides, nature tours, snowmobiling, cross-country skiing. Hunting for resident black bear, resident moose, waterfowl and upland game birds.
Mr. Tee's Fishing Adventures (The Pas)	Fishing for walleye, northern, lake trout, rainbow and more. Summer by boat, winter ice fishing.
Nootin Resort, Simon Nabess Wayside Park (The Pas)	Hunting, fishing, eco-tourism.
True North Outfitters (The Pas)	Non-resident bear hunting, grouse and fishing.
Source: WMC Research, 2018	



### 2.2.4.1 WMC Assessment

- None of the attractions identified in the region would, in and of themselves, be attractors. However, star attractions become “must see” sites for visitors who have come to the region to experience the natural heritage, which is the major attractor.
- The OCN vertical farm has the potential to become an interesting attraction for visitors if a credible story, video and tour can be developed so that visitors can witness the operation without actually entering the grow area.



- While many lodges have been listed as attractions, they are not “main trip purpose” attractions. Rather the lodges that were visited are generally lower level accommodations that were developed and are suitable for fishing and hunting visitors. They are not, however, at the level one would expect for CE and AE markets. WMC did not visit all lodges in the region, so this comment may not apply to all operators. In fact, WMC visited a small number of very nice lodges as well. Most lodges offer boat rentals and some offer snowmobile and/or quad experiences.
- Most operators are focused on fishing and hunting. Their high season is spring and fall. The summer period could be filled with leisure visitors from the CE and AE segments if lodges are upgraded, amenities are added, and significant marketing is completed. However, lodge operators generally do not appear to have the margins necessary to fund major upgrades. This is a challenge.
- Heritage resources are presented primarily in museums. The Flin Flon Museum, Snow Lake Mining Museum, Cranberry Portage Museum, and Sam Waller Museum all have interesting content. However, the presentation is static. These museums could all be brought up to a level suitable to CE and AE markets with some investment.



- The mural project in The Pas adds colour and interest to the urban environment.



### 2.2.5 Accommodations Base

The accommodation base consists of hotels and motels, “cabins”, and campsites. The last of these is the predominant way that the summer leisure market views the region.

The hotel base (Table 3) consists of roughly 650 total accommodation rooms in the Northwest area.

Table 3: ACCOMODATION FACILITIES		
Location	Facility Name	# Rooms
	<b>Hotels</b>	
Flin Flon	Oreland Motel	18
Flin Flon	Royal Hotel	39
Flin Flon	Victoria Inn	93
Opaskwayak	Kikiwak Inn	60
Snow Lake	Diamond Willow Inn	19
Snow Lake	Gold Rush Motel – Snow Lake Motor Inn	12
The Pas	Anderson Inn and Suites	70
The Pas	Golden Arrow Motel	14
The Pas	Rupert House Hotel	40
The Pas	The Pas Motel	24
The Pas	Wescana Inn	73
	<b>Hostels</b>	
Flin Flon	Flin Flon Friendship Centre Hostel	11 + 2 family rooms
	<b>B&amp;Bs</b>	
Snow Lake	Bluenose Bed & Breakfast	3
Snow Lake	Sunset Bay Bed & Breakfast	6
The Pas	Raven’s Nest Bed & Breakfast	2
The Pas	Watchi Bay Bed and Breakfast	1
	<b>Lodges</b>	
Clearwater Lake	Carpenter's Clearwater Lodge	6
Clearwater Lake	Lockhart’s Landing	4
Cranberry Portage	Caribou Lake Outfitters	6
Cranberry Portage	Elbow Lake Lodge	9
Cranberry Portage	Northern Spirit Lodge	6
Cranberry Portage	PinePoint Lodge	Sleeps 12-16 people
Cranberry Portage	Tonapah Lodge	5
Cranberry Portage	Viking Lodge	16
Flin Flon	Bakers Narrows Lodge	15

Table 3: ACCOMODATION FACILITIES		
Location	Facility Name	# Rooms
Flin Flon	Kississing Lodge	Data not available
Flin Flon	Paradise Lodge	11
Flin Flon	Westwood Lodge	6 cabins, 2 outposts
Snow Lake	Burntwood Lake Lodge	30 people in main lodge, 25 outposts
Snow Lake	Tawow Lodge	5 cabins, 1 outpost
Snow Lake	Wekusko Falls Lodge	Data not available
The Pas	Aberdeen Lodge	5 cabins
The Pas	M&M Outfitting	4
The Pas	Nitootem Northern Adventures	11
The Pas	Peterson's Reed Lake Lodge	4
	<b>Resorts (Fixed Roof)</b>	
The Pas	Evergreen Resort	8
	<b>Cabins</b>	
Bakers Narrows	Bakers Narrows Yurts	6
Flin Flon	T & D Amisk Cabins	10
The Pas	Clearwater Lake Yurts	6
The Pas	Simon Nabess Wayside Park, Nootin Resort	Data not available
Wanless	Kum-Bac-Kabins	11
Wanless	Rocky Lake Resort	8 cabins, 2 trailers
Source: WMC Research, 2018		

Campgrounds are also an accommodation resource in the region.

Table 4: TOURIST CLASS PRIVATE CAMPSITES IN THE REGION		
Name	Location	Number of Sites
Provincial Campgrounds		
Campers Cove	Clearwater Lake Provincial Park	See Table 5
Pioneer Bay	Clearwater Lake Provincial Park	
Bakers Narrows Campground	Flin Flon	
Grass River Provincial Park (Gyles) Campground	Grass River	
Iskwasum Campground	Grass River Provincial Park	
Reed Lake Campground	Grass River Provincial Park	
Wekusko Falls Provincial Park Campground	Wekusko Falls Provincial Park	
Private/Municipal Campgrounds		
Cormorant Community Campground	Cormorant	25
McKenzie's RV Park Campground	Cranberry Portage	20
Camp Whitney	Flin Flon	10 cabins, 2 chalets plus tent sites

Table 4: TOURIST CLASS PRIVATE CAMPSITES IN THE REGION		
Name	Location	Number of Sites
Flin Flon Tourist Park and Campground	Flin Flon	54
Opasquia Agriculture Society RV Park	The Pas	20
Source: WMC Research, 2018		

Manitoba Parks estimates that approximately 325,000 person-visits occur in provincial campgrounds in the Northwest region annually. At an average per capita spending level of \$50 per visit (conservative estimate) this aspect of tourism would yield about \$16.25 million in revenue to the region annually. However, since a high percentage of stays are local and based on seasonal bookings, the impact is estimated to be less than half this number.



Table 5: Northwest Region Camping Visits in Provincial Campgrounds										
	Nightly Camping				Seasonal Camping			Yurts		All users
Provincial Campgrounds	# of Nightly Sites	Unit Nights	Occupancy rate	Average length of stay (nights)	# of Seasonal sites	Seasonal sites sold	Estimated Seasonal unit nights	# of Yurts	Yurt unit nights	Visitation (traffic counts)
Clearwater Provincial Park: Campers Cove (The Pas)	39	2541	54.2%	3.3	30	30	900	9	821	104,234
Clearwater Provincial Park: Pioneer Bay Campground (The Pas)	19	981	40.6%	5.1	7	7	210			No traffic counters (WMC Est 2,000)
Bakers Narrows Provincial Park & campground (Flin Flon)	69	4374	57.0%	4.2	28	28	840	6	546	146,913
Grass River Provincial Park: Gyles Lake Campground (Cranberry Portage)	32	807	23.4%	No data	25	25	750			3,731
Grass River Provincial Park: Iskwassum Campground (Cranberry Portage)	41	1364	32.7%	No data	13	13	390			11,995
Grass River Provincial Park: Reed Lake	45	822	16.6%	No data	13	9	270			6,724

**Table 5: Northwest Region Camping Visits in Provincial Campgrounds**

Provincial Campgrounds	Nightly Camping				Seasonal Camping			Yurts		All users
	# of Nightly Sites	Unit Nights	Occu-pancy rate	Average length of stay (nights)	# of Seasonal sites	Seasonal sites sold	Estimated Seasonal unit nights	# of Yurts	Yurt unit nights	Visitation (traffic counts)
Campground (Cranberry Portage)										
Wekusko Falls Provincial Park & Campground (Snow Lake)	67	2723	36.4%	4.2	31	31	930			49,378

### 2.2.5.1 WMC Assessment

- The fixed roof accommodation base is primarily in the two- or three-star category. Motels are generally older and appear somewhat tired. Motor hotels appear to be in better shape and doing better financially. Most limited service or full-service hotels are adequate for the markets that are being targeted. However, the total rooms in these properties in each community are relatively limited. This is an issue in being able to build the market.



- WMC has commented on lodge product in a general manner in the attractions section.

- Provincial campgrounds in the area provide treed, well-spaced, and large powered and dry camping sites for RV and tent users. Excellent washrooms with showers, interpretive programming, boat launches and docks and other amenities are all provided. The price is very affordable. About 47% of provincial sites in the region are allocated to seasonal users at maximum pay 44% of the market value of the site based on rack rate over the summer, so they are offered an excellent deal. There is no additional charge for air conditioning, which is common in private RV parks.



- Private RV Park operators are challenged in this region, in the opinion of WMC, because the price of seasonal camping is maintained at a low level by public sector pricing. Private operators charging \$500 a season and \$200 for storage are charging far less than is the average in other places in Canada. At many Alberta RV parks, seasonal rates are over \$3,000 and another \$200 for use of air conditioning. Storage is about \$800 for the winter. It

was observed that private RV operations will likely be unable to upgrade to higher standards if they can't get their margins higher.

## 2.2.6 Restaurant Base

The restaurant base in the region provides primarily table service and fast food dining for regional residents and visitors.

Some restaurants can become regional attractions and "must have" experiences for regional tourist.

Table 5: DESTINATION RESTAURANTS IN THE REGION		
Name	Location	Brand/Type of Food
Cranberry Portage Coffee Shop	Cranberry Portage	Café
Fidler's Corner	Cranberry Portage	Canadian
Viking Lodge	Cranberry Portage	Canadian
Mike's Ice N Burger Hut	Flin Flon	Canadian
Mugsy's Deli	Flin Flon	Canadian
Royal Hotel	Flin Flon	Canadian
The Orange Toad	Flin Flon	Café
Victoria Inn	Flin Flon	Continental
Angelina's Pizza	Snow Lake	Pizzeria
Rose Room Restaurant	Snow Lake	Retro Canadian
Aseneskak Casino	The Pas	Canadian
Dutch Drive In	The Pas	Fast Food
Good Tymes	The Pas	Canadian/Pub
John & Jessie's Steak and Ribs	The Pas	Canadian
Lyet's Café	The Pas	Café
Miss the Pas	The Pas	Canadian/Breakfast
Wescanna Inn	The Pas	Canadian/Breakfast



### 2.2.6.1 WMC Assessment

- A range of restaurant offerings in the region are adequate for the target markets.
- There is little variety offered across restaurants. There appears to be little ethnic food offerings and little or no country food or traditional indigenous food. WMC understands the sourcing issues with country foods.
- As markets grow, food offerings will be developed by entrepreneurs in the area.



### 2.2.7 Retail/Service Base

The retail base is typical of regions that are not heavily focused on tourism.

Table 7: TOURISM SERVICES	
Operations	Operations
Cranberry Air & Wilderness Outfitters	Float-in charter air services to a chosen destination. A variety of aerial tours of the breathtaking surrounding area. Fly-in fishing packages. Unique wilderness adventures.
Gogal Air Service	Air service associated with Burntwood Lake Lodge
TBM Taxi (Snow Lake)	Taxi service
White Feather Cree-ations (The Pas)	Indigenous artisan wares
Tourist Information Centre (The Pas)	Information centre
Mississippi Air Service	Charter air service
Tourist information in the Flin Flon Museum (Flin Flon)	Information centre
Flin Flon Aquatic Centre (Flin Flon)	Swimming pool
Winton Pool (The Pas)	Swimming pool
Sweet Nothings Art Gallery (Snow Lake)	Art gallery
Northern Buffalo Sculptures (Cranberry Portage)	Art gallery
NorVA Centre (Flin Flon)	Art gallery
Channing Beach (Flin Flon)	Beach
Blondies Beach (Flin Flon)	Beach
Denare Beach (Flin Flon)	Beach



Table 7: TOURISM SERVICES	
Operations	Operations
Petes Pro Tackle (The Pas)	Fishing, hunting and sports supplies
Farmers Markets (Multiple Locations)	Farmers markets
Craft Shows (Multiple Locations)	Craft shows
Cross-Country Skiing (Cranberry Portage, Flin Flon)	Cross-country skiing
Golf Courses (Flin Flon, Snow Lake, The Pas)	Golf courses

### 2.2.7.1 WMC Assessment

- Retail operations are limited in the four communities in the region. While original artisanal craft is offered from the Northern Visual Arts Centre gallery, a co-op in Flin Flon, its artists are not exposed to downtown traffic.



- Other tourism services are limited except for hunting and fishing supply services. While gas and diesel are available in the communities, recreation services such as boat rentals, bike rentals and so on are not very evident. These services will become more common if the markets grow.

- Only Flin Flon has potential to create a walkable downtown streetscape that is attractive to the tourism market. Flin Flon has a few blocks of existing retail area with interesting three and four storey structures, heritage street lighting, flower baskets and street furniture. This can be the base for creation of a three block, architecturally-controlled, mining-themed streetscape that would be a magnet for tourism.



- While The Pas has a few streets that could become tourism walkable streets, it is a long way from becoming a tourism hub community.
- Cranberry Portage is a stopping point but not a tourism hub.
- Snow Lake has potential to become a hub for lake-based tourism, but it does not have a defined downtown that could become a retail street. It is better to create a cluster of activity around the museum or the hotel initially, growing it as tourism grows.

## 2.2.8 Events Base

A regional base of events is also important for tourism development. There are a number of yearly events in the area, with Cultural Days in Flin Flon being a major attractor in September.

Table 8: MAJOR EVENTS IN THE NORTHWEST REGION		
Name	Visits	Month/Location
Bill Bannock Ice Fishing Derby	550 (2018)	March/Clearwater Lake
Trout Challenge	Data not available	August/Cranberry Portage
Bust the Winter Blues Festival	Data not available	February/Flin Flon
Flin Flon Fishing Derby	500 (2018)	March/Flin Flon
Flin Flon Trout Festival	2,400	July/Flin Flon
Blueberry Jam Music Gathering	2018 Will be the first year for the event	August/Flin Flon
Culture Days	17,701	September/Flin Flon
Opaskwayak Indian Days	Data not available	August/Opaskwayak Cree Nation
Opaskwayak Summer Pow-wow	Data not available	Opaskwayak Cree Nation
Jimmy Jackfish Ice Fishing Derby	656 (2018)	March/Rocky Lake
Chuck Wagon Races	Flooded last year so got cancelled	August/Rural Municipality of Kelsey
Winter Whoot Festival	1,100 (2017) 1,000 (2018)	March/Snow Lake
Northern Manitoba Trappers' Festival	Data not available	February/The Pas
Source: WMC Research, 2018		

### 2.2.8.1 WMC Assessment

- Most festivals serve local and northern markets and are not focused on tourism.
- There may be an opportunity to grow one or more festivals to draw tourism.
- A festival around the snowmobile assets of the region may build some market.

## 2.2.9 Tourism Information and Promotion

- Existing local tourism promotion activities include:
  - Some promotion done by the Chambers of Commerce
  - The Pas/OCN Destination Marketing Committee
  - SnoMan trail maps for the region
  - Websites for each community
  - Regional tourism booklet for Flin Flon, Creighton, Cranberry Portage

### 2.2.9.1 WMC Assessment

- The recent production of the *North to Adventure Visitor's Guide* is a great accomplishment. This guide will improve over time as more visual material is produced and more partners buy into this marketing.
- Marketing should focus on assets which are ready for the CE and AE target markets.

### 2.2.10 Infrastructure

WMC has commented on intra-regional transportation infrastructure, which is critical to tourism growth. In this section WMC will comment on each community as an essential part of the tourism fabric of the area.

#### 2.2.10.1 The Pas/OCN



The Pas is a service centre for the economic region surrounding it, and its economic base and functions reflect primarily that role. It serves tourism, and primarily fishing and hunting tourism, as one aspect of its role as an economic hub.

The downtown of The Pas is hard to define. Business focus areas are located in the downtown area and significantly at the mall on the OCN side of the river. This split commercial pattern limits the tourism hub potential of the area.

#### 2.2.10.2 Cranberry Portage



This very small community functions as a stopping point from a tourism perspective. Its role will continue in that vein even when markets to the area are grown. The community offers lake-based recreation in pleasant surroundings and provides basic services to visitors. Cranberry Portage offers a very desirable local lifestyle for its residents.



#### 2.2.10.3 Flin Flon

Flin Flon is a community located in the Precambrian Shield, and its configuration works around the rocky outcrops on which it is located. The tourism welcoming role of the museum, visitor centre, Flinty statue, campground and amphitheatre ensure that travelers will stop in that area. The location of the WalMart and Co-op nearby provides retail support to visitors.

The downside of this welcoming approach is visitors obtain all their needs at the edge of town and are not stimulated to go to the downtown. The downtown area has a three-block main street area that has been upgraded in recent years and is ripe for a comprehensive main street program. A theme (most likely around mining), façade control and a façade upgrade program, incentives to attract artisans downtown, and a solution to the RV parking problem can turn this downtown into a walkable tourism experience. Detailed planning would be needed.

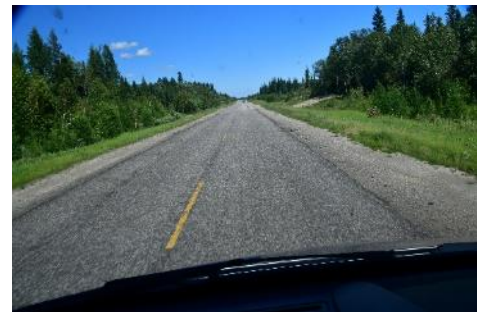


#### 2.2.10.4 Snow Lake

A small hub for northern visitors, Snow Lake is a wonderful lakeside community for those who live there year-round. While it is not configured for urban tourism, it has beach resources, fixed wing and helicopter rentals, and boat rental opportunities that add to the tourism experience. The museum can be upgraded to present mining history in the region in a more animated fashion and could become a major attraction in the future. Land for RV camping development is available in the community. Tourism products can be developed from the existing base in Snow Lake, reducing risk and expense for entrepreneurs. The main challenge is the road.

#### 2.2.10.5 WMC Assessment

- Road infrastructure in NW is a limiting factor. While many roads are being upgraded, critical highway infrastructure is in poor or moderate condition, with narrow gravel shoulders, patched pavement, and either no pull offs or poor quality pull offs. Road infrastructure requires attention if tourism growth is to be supported over time.



- It appears that regional lodge operations do not generate sufficient income to bring properties up in quality in a timely manner. The fishing and hunting market does not require the quality level that the AE and CE markets demand. Some operators are making great efforts to improve their properties.

## 3.0 The Demand Side: Markets and Forecasts

In looking at the demand side of the equation for the product market match, we need to look broadly at tourism demand trends and our positioning.

### 3.1 Market Situation and Characteristics

A brief assessment of the market situation and opportunities is provided following.

#### 3.1.1 National and Regional Economy

Canada is currently a strong destination for international markets because the Canadian dollar hovers around \$0.75 US at the time of writing. Visitation to Canada from the United States is at a high point and is expected to continue. The Canadian economy grew by 3% in 2017 and is forecast to grow at closer to 2% in 2018.

The American economy is producing exceptional growth. Outbound travel from the US to destinations like Canada, is expected to be strong and positive going forward. Similarly, overseas outbound travel, including to Canada, is expected to be strong, in part due to the ageing and high-income cohorts from developed European nations wanting to experience exotic destinations.

The Manitoba economy continues to grow slowly and is forecast to grow in the range of 1.8% in 2018 and 1.3% in 2019 (The Conference Board of Canada, 2018<sup>2</sup>).

#### 3.1.2 The Northern Regional Economy

A summary of the current situation for the Northern Manitoba regional economy, which opens the **Look North Report and Action Plan for Manitoba's Northern Economy**, underlines the economic malaise faced by the North:

*"With 67% of the Manitoba's land area and just over 7% of its population, northern Manitoba has been a long-term net contributor to the economic prosperity of Manitoba, as the source of some of the province's richest natural resources and tourism icons.*

*Today, however, it is a region in decline, suffering significant job losses in key industries and anchor companies – around which infrastructure and communities have been built and become reliant. The current suspension of rail service to Churchill due to flood damage highlights the critical and volatile nature of infrastructure and the importance of it for servicing northern industry and communities.*

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<sup>2</sup> The Conference Board of Canada (2018). *Provincial Outlook Economic Forecast: Manitoba – Winter 2018*.



*In a region where nearly 75% of the population self identify as Indigenous, with nearly 50% living on First Nations where unemployment is typically above 75%, where 52% of the population do not have a grade 12 education, and a growing youth population, this trend demands response."*

The document entitled **North Region Economic Profile**, prepared in support of **Look North**, is the latest compiled set of information available for the North and is the source of the summary in this section. Comprising Census Divisions 19, 21, 22, and 23, the region geographically covers a large part of the province of Manitoba. However, its population numbers about 91,000 persons.

Data specifically for the Northwest area is not available from these sources.

Key characteristics of the regional economy are summarized as follows:

- Population grew by over 15% between 1991 and 2016, exceeding the 7.1% increase of Manitoba as a whole.
- The region is younger than Manitoba as a whole, with more people in the 0-29 age group than Manitoba as a whole, and fewer in the 30-75+ age categories in 2016.
- The North has a higher percentage of residents with lower levels of education than the Manitoba average.
- Average household income in the North was lower than the provincial average in 2005 and 2015; the North average in 2015 was \$75,532, compared with a Manitoba household income average of \$85,373 in that year.
- In 2015, the North region had a higher percentage of households than the Manitoba average, in income brackets below \$50,000 a year; conversely the North had a lower percentage than the Manitoba average of households in income brackets above \$50,000.
- The North region recorded 31,741 jobs in 2017. The largest number of jobs by industry sector included public administration (16%), healthcare and social assistance (15%), educational services (13%) and retail trade (10%). Accommodation and food services accounted for 6% of jobs, while arts, entertainment and recreation accounted for 1%.
- Between 2011 to 2017, tourism grew by 154 jobs (5.4%), the second highest growth in jobs next to transportation and logistics. However, job losses in the primary sectors (mining, oil and gas productions and transportation, utilities and power) overshadowed growth. The region as a whole lost 49 jobs (-0.2%) in the period between 2011-2017.
- When tourism is addressed as an economic cluster, it accounts for 9% of northern jobs, second only to health services (11%) in the region. Tourism supported 2,984 jobs in 2017. Tourism had 301 businesses in 2016, second only to construction and development in that year.

- Within the region, some 51% of all businesses are represented by self-employed individuals. Another 38% of businesses have 19 or fewer employees. Three businesses employed over 500 people in 2016.
- Cluster analysis conducted for the period 2011-2017 shows tourism as a cluster that is equal to the national average in terms of relative strength (location quotient 1.0), and second in terms of regional growth in jobs. The table following illustrates the components of the tourism cluster and their relative strength in the north.

Table 6: Tourism Cluster Strength

<b>15. Tourism</b>				
<b>NAICS</b>	<b>Description</b>	<b>2017 Jobs</b>	<b>Total Business</b>	<b>Location Quotient</b>
<b>Growing employment and high relative strength</b>				
7211	Traveler Accommodation	592	61	1.95
4811	Scheduled air transportation	522	7	4.83
4812	Non-scheduled air transportation	157	18	6.82
7132	Gambling industries	108	3	1.58
7212	RV (recreational vehicle) parks and recreational camps	68	46	1.98
<b>Growing employment</b>				
7225	Full-service restaurants	1,186	78	0.70
7139	Other amusement and recreation industries	135	25	0.47
4532	Office Supplies, Stationery, and Gift Stores	45	13	0.81
	<b>Cluster Total</b>	<b>2,984</b>	<b>301</b>	

Source: North Region Economic Profile

This table illustrates that certain industries (scheduled and non-scheduled transportation) have much higher location quotients than others, driving the average for the cluster up. The components of the tourism sector, coded under the North American Industry Classification System (NAICS) are illustrated in the table following.



Table 7: Tourism Cluster Components

15. Tourism	
NAICS	Description
4532	Office Supplies, Stationery, and Gift Stores
4811	Scheduled air transportation
4812	Non-scheduled air transportation
4821	Rail Transportation
4832	Inland Water Transportation
4871	Scenic and sightseeing transportation, land
4872	Scenic and sightseeing transportation, water
5615	Travel arrangement and reservation services
7111	Performing arts companies
7112	Spectator sports
7113	Promoters (presenters) of performing arts, sports and similar events
7114	Agents and managers for artists, athletes, entertainers and other public figures
7115	Independent artists, writers and performers
7121	Heritage institutions
7131	Amusement parks and arcades
7132	Gambling industries
7139	Other amusement and recreation industries
7211	Traveler Accommodation
7212	RV (recreational vehicle) parks and recreational camps
7213	Rooming and boarding houses
7223	Special food services
7224	Drinking places (alcoholic beverages)
7225	Full-service restaurants

### 3.1.3 The Northwest Economy

There is no specific data aggregated for the Northwest Region.

### 3.1.4 Regional Tourism Economy

Tourism in the Northwest area can be described only from anecdotal information, as there are no specific visitor counts available and there is not visitor centre which might track visitors by origin. However, northern region information from the Northern Manitoba Tourism Strategy was addressed in the Thompson Tourism Action Plan (2017, draft):

*“Although tourism is not a “star” industry in the north (with the exception of Churchill), it is an important industry. North of 53 ranks 3<sup>rd</sup> in terms of overall revenues from visitations at \$116M and ranks 1<sup>st</sup> in per capita revenue (almost twice as much as the next region). Tourism generates \$28M in taxes<sup>3</sup> in the north.*

<sup>3</sup> Based on 2014 data. Thompson Tourism Action Plan 2017 (Draft).

Table 8: Comparative Visitation and Expenditure, Manitoba Tourism Regions, 2014							
Region	Person-Visits	Percent of PV	Spend	Percent of Spend	Per Person Visit	O/N Visits	Day Trips
<b>Northern Manitoba Region</b>	<b>530,000</b>	<b>5</b>	<b>\$116,000,000.00</b>	<b>8</b>	<b>\$218.87</b>	<b>234,000</b>	<b>294,000</b>
Eastern Manitoba Region	2,223,000	20	\$138,400,000.00	9	\$62.26	718,000	1,505,000
Interlake Region	1,326,000	12	\$91,400,000.00	6	\$68.93	377,000	948,000
Parkland Region	467,000	4	\$53,000,000.00	4	\$113.49	208,000	258,000
Pembina Valley Central Plains Region	1,227,000	11	\$101,000,000.00	7	\$82.31	300,000	926,000
Southwest Region	1,811,000	16	\$211,000,000.00	14	\$116.51	494,000	1,318,000
<b>TOTAL</b>	<b>7,584,000</b>	<b>68</b>	<b>\$710,800,000.00</b>	<b>48</b>		<b>2,331,000</b>	<b>5,249,000</b>
Compiled by WMC, 2017 numbers may not add due to rounding							

There are no specific tourism data for the Northwest is available at this time. However, based on our visit to the region, it is clear to WMC that tourism in the Northwest Region consists primarily of northerners from within the region and from nearby regions primarily visiting for outdoor recreation experiences. Evidence for this observation is as follows:

- Casual license plate assessments in campgrounds, day use areas, malls and downtowns would lead to the conclusion that almost all visitors are from Manitoba. Very few were from Saskatchewan, Alberta or the United States.
- The vast majority of camping units and recreation equipment were evidently owned by the operators. No rented RVs, for example, were evident.
- High occupancy of seasonal sites by local/regional residents was evident.

Thus, the regional tourism economy of the Northwest today consists of northern Manitobans enjoying their beautiful northern lakes and beaches. It is primarily a local recreation economy rather than a destination tourist economy.

## 3.2 Target Markets for the Northwest

The question for the Northwest is whether more of a destination tourism economy can be created, developed and grown over the coming few decades. This question will be addressed in the recommendations.

### 3.2.1 Long-Term Tourism Forecasts

There are no long-term tourism forecasts relevant to the Northwest region specifically.

Market penetration in the medium-term future for Northwest Manitoba is most likely to occur in Manitoba and Saskatchewan markets. The growth forecasts for those provinces will therefore be the most relevant to the tourism future of the Northwest.

The situation in the US will also be relevant for tourism to Manitoba and by extension the Northwest region. A low Canadian dollar will attract more visitors from the US, as will market conditions in the USA. With unemployment at historic low levels, business growth at highest levels in decades, and disposable income rising, the US will be a good market for Manitoba and for Canada in the immediate and medium-term future.

### 2.2.7 Potential Markets

The two highest potential segments are: Authentic Experiencers (AE) – independent travellers seeking vast nature and local culture; and Cultural Explorers (CE) – independent travellers who want to immerse themselves in local culture of places they visit.

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

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

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

#### 3.2.2.1 Authentic Experiencers

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

AEs:

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

#### Canadian Authentic Experiencers:

- Are older, more highly educated, and almost as many are retired as are working full time.
- Live primarily in city neighborhoods, with fewer in towns or rural areas.
- Mostly take one to two weeks of vacation out of town.
- Make physical health and well-being a priority.
- Are more creative and expressive than their global counterparts.

AEs love trips that teach them about history as well as cultural differences. They actively seek out the most authentic cultural experience possible rather than a whirlwind tour of the “must-sees”. AEs love connecting with locals – they prefer to do their own thing and stay away from tourist crowds. AEs are less likely to seek out luxury amenities or gourmet experiences. Travel has a focus on learning, not about escape from day-to-day. AEs also enjoy nature, but not more so than average.

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

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

- Seeing beautiful beaches
- Visiting national and provincial parks to see wildlife
- Multi-day touring on their own by car
- Visiting well-known historic sites and buildings

Authentic Experiencers like to do the following when they travel:

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

### 3.2.2.2 Cultural Explorers (CE)

Explorers want to discover the entire experience of the culture, people and setting of the places they visit. And, while they enjoy learning about a culture through a museum, they also want to participate in the modern-day culture as well. They go off the beaten track to find out how people truly live. They want to attend local festivals, watch for wildlife along heritage rivers and share a drink with the regulars at the local bar.

CEs like to be spontaneous and will embrace events that are unexpected. They enjoy learning from other cultures and believe in the preservation of cultural heritage and customs. They can easily adapt to changes in modern life, treating it as a learning experience.

CEs believe in balancing mind, body, and spirit. CEs are not status driven consumers; they are not showy in their purchases or travel. CEs are not often influenced by brands and are more likely to support small business, whom they feel will be responsive to their interests. They have a strong need to be unique and have little concern for staying on top of the latest fashion and trends.

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

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

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

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

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

For example, Cultural Explorers like:

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

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

### 3.3 Competitor Assessment

Manitoba’s two major target market segments, Cultural Explorers and Authentic Experiencers, can choose from competitors around the world. There are many destinations and operators offering amazing experiences for these markets in Canada as well.

In assessing “head-to-head” competition for the Northern Manitoba experience, WMC is considering CE and AE markets from Winnipeg, Regina, Saskatoon, Calgary, and Edmonton. A subset of these markets may be prepared to travel north for an experience. Therefore, direct competitors were considered from northern destinations in Saskatchewan. Manitoba-based competition from south of 54 was not considered in this assessment, although those operators may be in the consideration set for CE and AE markets.

In the summary below are a number of smaller, northern destinations in Saskatchewan that offer a similar product and experience to that of Northern Manitoba.

### 3.3.1 Nipawin (<http://nipawin.com/>)

The Town of Nipawin has long been one of Saskatchewan's secret outdoor lifestyle destinations. The Town is located on Highway #55 which connects the Manitoba Border to Meadow Lake and on Highway #35 to the United States Border, both highways are paved. Nipawin is situated on the Canadian Pacific Railway. It is surrounded by agricultural development with easy access to the Forté a'la Corne Provincial Forest to the west and Northern Provincial Forest to the north.

The immediate vicinity, particularly to the south and east, has a gentle topography. Saskatchewan Power has created two man-made lakes by the construction of the E.B. Campbell Dam in 1963 and the Francois Finlay Dam in 1986. The Town of Nipawin is located between Tobin Lake and Codette Lake. To the north lies the parkland of Central Saskatchewan. There is no farming beyond this parkland, placing our town between fine farmland to the south and recreation and forest to the north. The primary industries in Nipawin are tourism, transportation, retail, agriculture, and manufacturing.

#### **Places to Stay** (<http://nipawin.com/accommodation.cfm>)

- 7 accommodation facilities (inns, lodges, motels) including one RV park



*Tobin Lake Motel*



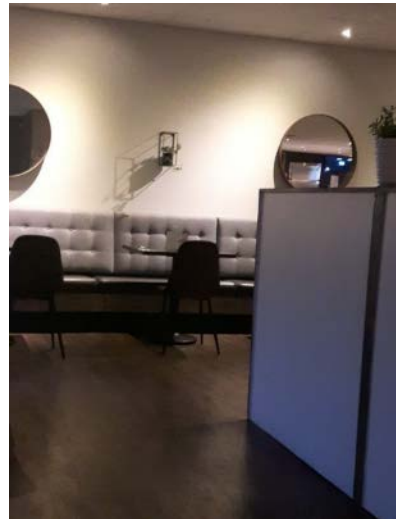
*Shorebird Inn*



**Places to Eat** (<http://nipawin.com/dining.cfm>)



*The Dam Smokehouse*



*The Spot Restaurant  
and Lounge*

**Attractions** (<http://nipawin.com/area-attractions.cfm>)



*Living Forestry Museum*



*Nipawin & District Regional Park*

**Events**

Fishing Tournaments <http://nipawin.com/fishing-tournaments.cfm>

Nipawin Exhibition – July

**3.3.2 La Ronge** (<https://www.laronge.ca/>)

A vibrant town with a population of approximately 3,000 people located on the shores of Lac La Ronge, nestled next to Lac La Ronge Provincial Park (Nut Point) and apace to the beautiful Boreal Forest.

The Northern Town of La Ronge closely neighbours two other communities, the Northern Village of Air Ronge and the Lac La Ronge Indian Band. The three communities work in co-operation for

a variety of regional services and residents benefit from the cross-use of facilities and the diversity of businesses within close proximity.

There are many activities and organizations in and around La Ronge that offer great opportunities to stay fit, socialize, and/or volunteer.

The town is home to the La Ronge Ice Wolves SJHL hockey team, many community parks, a great variety of food, a sandy beach right down town and can boast the convenience of being close to campgrounds, hiking trails, golf courses, and of course, world class fishing lakes.

**Places to Stay** (<https://www.laronge.ca/accommodations>)

- 7 hotels and resorts



*Waterbase Inn*



*Twin Falls Lodge*

**Places to Eat** ([https://www.tripadvisor.ca/Restaurants-g670339-La\\_Ronge\\_Saskatchewan.html](https://www.tripadvisor.ca/Restaurants-g670339-La_Ronge_Saskatchewan.html))



*Eagle Point Restaurant*



*Cravings Late Night Food*

## Attractions

([https://www.tripadvisor.ca/Attractions-g670339-Activities-La\\_Ronge\\_Saskatchewan.html](https://www.tripadvisor.ca/Attractions-g670339-Activities-La_Ronge_Saskatchewan.html))



*Lac La Ronge Provincial Park*

### 3.3.3 Big River

(<http://www.tourismsaskatchewan.com/community/511/big-river#sort=relevancy>)

Big River and area offers great year-round activities for the outdoor enthusiasts including fishing off the dock at the end of Main Street, ATVing and sledding along local trails, swimming and fishing in the many surrounding lakes and browsing through the many great stores and shops in town. Scenic, friendly and historic - a place for everyone.

**Places to Stay** (<http://www.bigriver.ca/tourism-and-rec>)

- 2 hotels/motels, 2 lodges/ranches, 3 resorts, 2 bed & breakfasts, 5 campgrounds



*Timberland Motel*



*Nesslin Lake Yurt Rentals*



**Places to Eat** (<http://www.bigriver.ca/business-services/business-directory>)



*Third and Main*

**Attractions** (<http://www.tourismsaskatchewan.com/community/511/big-river#sort=relevancy>)



*Big River ATV and Snowmobile Trails*



*Prince Albert National Park*

**3.3.4 Meadow Lake** (<http://www.meadowlake.ca/>)

Meadow Lake is the gateway to the north, just a short drive away from Meadow Lake Provincial Park and other outdoor recreation areas. The northwest region of Saskatchewan offers a variety of recreational attractions. The local parkland, with its many small lakes, is ideal for cottage vacations and camping, while the northern forest areas feature great fishing and hunting.

Meadow Lake is a thriving community consisting of a vast assortment of businesses, schools, health care and recreational opportunities such as the outdoor adventures available at St. Cyr Trails and Meadow Lake Provincial Park. The community also has many recreational facilities such as the five-lane indoor pool, outdoor spray park, 18-hole golf course, shale ball diamonds, soccer/football fields, indoor and outdoor rinks, tennis courts, stampede grounds and more.

**Places to Stay** ([https://www.tripadvisor.ca/Hotels-g499385-Meadow\\_Lake\\_Saskatchewan-Hotels.html](https://www.tripadvisor.ca/Hotels-g499385-Meadow_Lake_Saskatchewan-Hotels.html))

- 5 hotels, 2 bed & breakfasts, 5 specialty lodging, 5 campgrounds



*Waters Edge Eco Lodge*



*Nor'Wester Motor Inn*

**Places to Eat**

([https://www.tripadvisor.ca/Restaurants-g499385-Meadow\\_Lake\\_Saskatchewan.html](https://www.tripadvisor.ca/Restaurants-g499385-Meadow_Lake_Saskatchewan.html))



*Eatery on Main*



*Garfunkel's Gourmet Grill*

**Attractions** ([https://www.tripadvisor.ca/Attractions-g499385-Activities-Meadow\\_Lake\\_Saskatchewan.html](https://www.tripadvisor.ca/Attractions-g499385-Activities-Meadow_Lake_Saskatchewan.html))



*Meadow Lake and District Tourist  
Information Centre and Museum*



*Meadow Lake Provincial Park*



## 4.0 Tourism SWOT Summary for the Northwest

As part of a tourism brand potential exercise facilitated by Lloyd Fridfinnson Consulting, stakeholders conducted a SWOT analysis of existing Flin Flon and The Pas tourism-related organizations, amenities and infrastructure. High priority areas were identified using a dot exercise and are highlighted below in bold and listed in order of priority. In addition to this work, a team of Travel Manitoba professionals added material to the SWOT. Finally, WMC traveled to the region to validate this SWOT.

WMC has reproduced this SWOT below. While it has impacted our research in terms of what to look for in the validation exercise, WMC has made its own conclusions about the region.

### 4.1 Flin Flon SWOT

#### Strengths

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>■ Physical beauty of the place</li> <li>■ Rocks and lakes</li> <li>■ Unique town appearance</li> <li>■ Community spirit</li> <li>■ Cultural hub</li> <li>■ Support of local government</li> <li>■ Long summer days – summer weather</li> <li>■ History</li> <li>■ Live local music</li> <li>■ HBMS support</li> </ul> | <ul style="list-style-type: none"> <li>■ Friendly community</li> <li>■ Volunteerism</li> <li>■ Support of business</li> <li>■ Safe</li> <li>■ Flinty</li> <li>■ Lots of local events</li> <li>■ Accessibility</li> <li>■ Saskatchewan border goes through town</li> <li>■ Flin Flon Bomber brand</li> </ul> |
|--|---|

#### Weaknesses

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>■ Remoteness</li> <li>■ Accessibility</li> <li>■ Wi-Fi/Internet</li> <li>■ Antiquated recreation facilities</li> <li>■ Self-awareness of what Flin Flon lacks</li> <li>■ Customer service</li> <li>■ Cell service</li> <li>■ Cost to bring things/to do business</li> <li>■ Community calendar for tourists</li> </ul> | <ul style="list-style-type: none"> <li>■ RV capacity</li> <li>■ Boring restaurants</li> <li>■ Inadequate business support</li> <li>■ Cash in cabs</li> <li>■ Unpredictable weather</li> <li>■ Employee pool</li> <li>■ Mine odour</li> <li>■ Businesses shorting tourists on the US dollar</li> </ul> |
|---|---|

### Opportunities

- First Nations, Indigenous collaboration
- Rock geology uniqueness
- Captive audience
- Remoteness
- Ignorance of Flin Flon to the outside world
- Quirky name
- Outsiders (Winnipeggers) have no opinion of Flin Flon
- Social media
- Citizen buy-in, attitude shift
- Diaspora return
- Winter
- Bobby Clarke
- Frank Gunston
- Reggie Leach

### Threats

- Shabby appearance of some aspects of Flin Flon
- Town wayfinding signage
- Need for community autonomy
- No buy-in from residents
- Flin Flon/Creighton rivalry
- Signage to find Flin Flon
- Grey market activity
- Social media
- Music sector capacity
- Flin Flon 'Post it'

## 4.2 The Pas SWOT

### Strengths

- Environment/natural resources
- Existing festivals
- Event continuity
- History
- Sports programming/hosting
- Snowmobile trails
- Friendly people
- Variety of cultures
- Location
- Quad trails
- Walking trails
- Casino

### Weaknesses

- Poor awareness of tourism product
- Infrastructure, roads
- Townsite lacking aesthetic appeal
- Geographic distance from tourism markets of Winnipeg and Saskatoon
- No transit system
- Lack of accommodations
- Highway 60
- Logistics between communities
- Too few tourism frontline ambassadors

## Opportunities

- Lakes, especially Clearwater
- Northern lights
- More guiding services for trails
- Selling experiences
- Tourism packages
- Summer fishing
- Genealogical studies
- Local food/culinary
- Tri-Council, unique and collaborative
- Winter fishing
- Historical trail tours
- LED vertical farms

## Threats

- Homelessness and panhandling
- Flight and rail costs
- Transportation infrastructure
- Cell phone
- Wi-Fi
- Lack of recreational facilities
- Other communities marketing efforts
- Rest stops

As well, sustainable development and parks issues were identified for the region. These weaknesses were:

- Less staff in Parks and much shorter park season affects the businesses because there is less for tourists to do.
- Pricing of yurts rentals undercuts lodges and is not covering costs for Parks.
- Water quality standards, some lodge owners feel the standard is not being followed by Parks itself.
- Private rental of cottages in provincial parks and elsewhere- playing field is not level with lodges and hotels.
- Exemption from park passes for short-term users (i.e., people going to restaurants in parks have to pay for a park pass, tradespeople have to pay for passes (federal parks do this)).
- Provincial parks close early which inhibits people from coming to the area in shoulder seasons.
- Parks is not plowing roads in the winter or creating the ice roads they used to.
- Lack of stocking of fish in stocked trout ponds.
- Lack of access in winter to stocked trout ponds - highways plows going right by but don't plow into lake (security of vehicles left on highway an issue – Department of Highways issue perhaps).
- No swimming area on some lakes so lodge owners have to provide swimming areas and clean up mess.
- Public docks that are no longer maintained.

- Park passes not available at some park offices or park offices not open all the time, tourists are expected to travel to in some cases up to 20 miles to buy park pass although there are no sign telling them that. Online parking passes may be an option.
- In the past, two park passes had been given to resorts to loan to guests as needed and this is no longer a practise.
- Camping at unauthorized sites outside of provincial parks; i.e., Barbie Lake – no garbage pickup, not fire safe, should these be shut down?
- Fishing licenses should be online.
- No central website to talk about ice conditions and trail conditions – one-stop online spot to get information on the area.
- Use of drones for marketing is restricted in Parks.
- Owner/operators are now being told they have to apply for permits for docks at their locations.
- Park capacity to deal with increased volumes of back country garbage.
- Park infrastructure is crumbling.
- Sewage capacity, not sure that it is a Sustainable Development Department issue but maybe in Parks it is.
- Travel Manitoba wants to sell fishing licenses, cannot get commission but Parks won't pay the service fees which would not be a lot of money.

## 5.0 WMC's Recommendations

Having documented the assessment and SWOT analysis, WMC makes the following key recommendations to the Northern Tourism Steering Committee in relation to building the Northwest Manitoba Destination area over time. Tourism development is not a short-term exercise. It takes decades to create tourism experiences and position a region for tourism success. The Northwest region is at an early stage of tourism development, a stage at which not everyone within the hub communities believes tourism can be an economic factor in the area. Travel Manitoba and other tourism partners must be committed to opening the significant natural assets of the region to tourism development by upgrading the cultural factors to the level of the natural heritage and to the expectations of the target markets.

### Recommendation 1: Improve the hub community of The Pas/OCN to better receive and support tourism from AE and CE markets.

- Develop wayfinding themes and signing to ensure visitors can access important resources. Use international signing protocols with themes aligned to the brand. Highlight the billboards, interesting community assets such as the railway station, Miss The Pas restaurant, the Vertical Farm (when it is ready for presentation), and functional support such as the Devon Park RV dump site.
- Address the heritage resources of The Pas/OCN and create a logical pathway to presentation of The Pas/OCN story. OCN could assist by developing the Indigenous heritage and story as an important part of the overall history of the community.
- Ensure heritage assets are open for tourism – historic churches, the Sam Waller Museum, and other heritage sites. Support OCN in developing Indigenous heritage attractions in the area.
- Ensure directional signing using international protocols and directs RV markets to the RV park operated by the Agricultural Society. Ensure this park is open, well-lit and safe for visitors.
- Promote hotels and motels that provide tourism-level accommodations.

### Recommendation 2: Improve Flin Flon as a tourism destination and regional hub community.

- Create a walkable downtown area in Flin Flon suitable for target tourism markets:
  - Improve Main Street storefronts with architecturally-controlled and mining-themed facades. Improve street furniture, public art, street lighting, and other street amenities with this theme. Open storefronts to cafés and patios in the summer.
  - Address RV parking near Main Street. Two sites are possible at the top of the Main Street hill at approximately First Avenue. RV parking sites must be secure, accessible, offer pull-through parking, and be affordable.

- Address Main Street parking through street painting; encourage parking off Main Street.
- Encourage artisans and crafts people to locate along these blocks of Main Street in locations where they can work, present and offer retail in their location. Co-operative ventures/artistic hubs have worked in other communities.
- Provide wayfinding to and through the downtown, position it significantly in all promotional material, and ensure that tourists from the public and private RV parks and campgrounds in the area want to come to the downtown.
- Create themed wayfinding systems throughout the community and tied to the Flin Flon brand. Follow international signing conventions.
- Investigate other ways to highlight the mining history of Flin Flon, working with operators.

### Recommendation 3: Improve Snow Lake as a tourism hub community.

- Improve the road into Snow Lake and encourage Wekusko Park visitors to make the trip.
- Investigate the potential for an RV campground on lands near the beach. Attract RV markets to an urban stay.
- Invest in the Snow Lake Mining Museum to upgrade displays; consider creating an underground experience through fabrication so visitors can experience the coolness, smells, dampness, noise and exhaust from air-driven equipment and the darkness of a drift or a raise.
- Improve wayfinding in the community with themed signing to major sites.
- Encourage entrepreneurs to create an experience on the lake – an overnight boat trip out to a yurt across Snow Lake may be a suitable product. A flightseeing tour and overnight Yurt stay on a more remote lake may be a package developed collaboratively by Snow Lake operators. This product can be developed with receptive operators as partners and packagers for the longer haul markets, with Snow Lake as the jumping off point.
- Encourage entrepreneurs to consider rental operations – power boats, canoes, quads, and snowmobiles may be considered, with guided or unguided experiences. Ensure that full supply chain supports are in place for northern canoeists and tourists who do not come fully supplied on their own.
- Develop products around snowmobiling; ensure Snow Lake is an important way point for longer haul snowmobile experiences.
- Improve Highway #391 into Snow Lake to a level suitable for RV traffic.



- Market Snow Lake as a northern recreational hub with access to tourism experiences in northern lakes and waterways.

#### Recommendation 4: Improve Cranberry Portage as a tourism stopping point community.

- Improve signage to the museum, RV parks and other amenities in Cranberry Portage to ensure markets have the opportunity to stop and experience the heritage of the community.
- Encourage local lodges in Cranberry Portage to upgrade to service levels appropriate for the AE and CE markets. Ensure rental opportunities are available for these clients – motorized boats, canoes, other water craft, and snowmobiles in the winter.
- Continue to upgrade support services to the lodges and campgrounds on the lakes and in the parks nearby.

#### Recommendation 5: Improve highways in the area by upgrading to tourism quality roadways in the areas identified.

- Ensure physical roadway upgrades to tourism quality road surfaces with quality rest stops at scenic locations or planned intervals. Scenic pullouts should be created in collaboration with Travel Manitoba and local people at bona fide tourism viewpoints. Washrooms and trailer dumping sites would be desirable at some of these stops.
- Ensure international protocol signing is in place along key highway corridors. In particular, ensure that fuel messaging identifies how far to the next fuel source.
- Upgrade provincial park signage to international standards.

#### Recommendation 6: Ensure provincial parks operate in support of tourism in addition to local camping and recreation.

Provincial parks are the engine driving accessible tourism in the region. They should be supported by all regional tourism players and communities in view of their role. Having said this, there are both immediate and long term considerations for an improved role of parks in the destination area.

- Work with Manitoba Parks to ensure strategic parks are open through the spring and fall tourism seasons in the region, in addition to the summer season.
- Ensure key roadways in parks are not contributing to noise, odour or dust pollution. In particular, Clearwater Lakes roadways should be treated to reduce or eliminate the dust issue which plagues the area.

- Manitoba Parks should work with Travel Manitoba to consider how provincial parks are impacting regional tourism:
  - Does the low seasonal rate and the high number of seasonal sites in choice locations cause depression of pricing and quality of product among private operators in the region? If private operators can only charge \$700 seasonally because Manitoba Parks is the price setter, these operators may not obtain enough margin to upgrade their products.
  - Does the rate charged for yurt camping in parks divert business from the private lodges? Does the low rate for yurts set a price point that lodge operators cannot meet? Can private operators afford to create competitive yurt products, or is Manitoba Parks losing money on yurts at the price they are charging?
- Ensure marketing of Manitoba Parks is integrated into the positioning and marketing of the tourism region and that Manitoba Parks' booking systems are aligned with the needs of non-local and non-Manitoban visitors.

### Recommendation 7: Improve the measurement of tourism.

- Develop methods for local measurement of tourism to the area. In particular, encourage major operators to share visitor counts with postal codes, country of origin and other locator data.
- Work with hotel owners to share aggregate data on visitors by numbers, origin, and postal code; encourage sharing of occupancy, average daily rates (ADR), revenue per available room (REVPAR) information over time.
- Work with airport and air service providers, and Via Rail to track visitor numbers and map seasonal visitation. Origin and length of stay data on visitors would be a major asset. Once an ongoing data approach is developed, ensure it is nurtured and relevant feedback is provided to the industry and the community.
- Measure growth in non-regional tourism and estimate economic impact by working with operators.

### Recommendation 8: Improve marketing of the entire region collectively and entrepreneurial initiatives individually.

- Fishing (and to a lesser extent hunting) is a main tourism product of the region. Enhance collaborative marketing to fishing markets in Canada and internationally to both attract and increase spending of these markets. Work with lodge owner to ensure that products are upgraded to the level the fishing markets can experience in other competitive destinations.

- Encourage new product development by entrepreneurs as growth to the CE and AE marketing to the region expands. Encourage packaging of lake-based multi-day experiences near hub communities. Encourage the Government of Manitoba to allow remote small area leases so operators can create “camps” on lakes and sell tourism packages to explore this wilderness experience.
- Facilitate individual operators to prepare business plans and build their business ideas as Travel Manitoba assists them with targeted partnership marketing.
- Travel Manitoba should develop positioning of the entire region based on the idea of accessible wilderness; marketing should highlight the hub communities as jumping off points to wilderness.
- Encourage an RV rental operator open a business in the area, so people can fly in and then drive camper models or small B and C class RVs to the regional experiences. Support this operator with targeted marketing and packaging with other operators.