

DELIVERING ON THE PROMISE

A 10-Year Product and Visitor Experience Development Strategy for Saskatchewan

2019 - 2029

Executive Summary

This ten-year Strategy establishes a vision for tourism product and visitor experience development across the province. The Strategy has been developed for Tourism Saskatchewan and outlines the strategic directions to pursue with tourism businesses, government partners and agencies, sector associations and communities. It is focused on what is needed to create and strengthen compelling reasons to visit the province.

Tourism makes an important contribution to provincial economic targets laid out in the Government's *Saskatchewan Plan for Growth*.

In 2017 tourism generated total traveller expenditures of \$2.4 billion, accounted for 67,000 related jobs, and is the province's fourth largest exporter with sales to out-of-province visitors reaching \$608 million.

This Strategy seeks to build on this foundation. The benefits of strengthening the tourism economy are compelling. If Saskatchewan was to grow its visitation and expenditures by 3% per annum through to 2030, it would mean an almost 50% increase in real expenditures and jobs and would provide a much stronger foundation for provincial economic prosperity.

THE CURRENT SITUATION

A comprehensive assessment of the current situation has informed this Strategy providing the context for its strategic direction and the rationale for its implementation. It is recognized from the outset that while a range of inter-related trends are shaping travel today, the most pervasive trend is the ever-increasing demand for experiences and the growth in experiential travel across all markets. Maintaining a strong focus on this trend and the opportunities it presents in areas such as culinary tourism, adventure experiences and Indigenous tourism, is key to the direction of this Strategy.

The review of the current markets and performance highlights the industry's capacity to grow. Saskatchewan has a high dependence on seasonal short-haul regional markets, with 90% of visitation originating from within Saskatchewan and its two neighbouring provinces, Alberta and Manitoba. Hotel indicators are subdued with the province having the country's lowest average daily rates and revenue per available room and the second lowest occupancy rates in 2017 – a trend exacerbated by the recent decline in the resource-based sector and associated business travel.

Looking toward 2029, Saskatchewan has strong assets to leverage for new growth. The diversity of landscapes; the wide range of outdoor recreation activities that includes some of the best

freshwater fishing in North America; the extensive system of parks and trails; the wealth of stories and rich cultural heritage associated with the Indigenous people and their traditional and contemporary culture; and, the ethnic tapestry of lifestyles arising from waves of settlement through to today – all create a dynamic context for tourism. These strengths and the very essence of Saskatchewan have been captured effectively in a consumer brand that resonates with industry and communities across the province.

However, while the natural and cultural assets are strong, the growth of tourism in Saskatchewan has been constrained by its distance from large urban markets and by declining air connectivity. A rural-urban divide within the province is reflected in a greater concentration of visitor spending in Regina and Saskatoon with their more sophisticated product and tourism infrastructure; while rural areas and smaller communities are more likely to be characterized by an under-investment in product. A growing prevalence of aging facilities in the north, the cost of internal transportation, and a lack of market readiness in many areas are undermining competitiveness. Difficulties in sourcing and retaining an adequate labour supply, and an industry that is not well understood as an economic sector further compound the deep-rooted issues that are suppressing the growth and sustainability of tourism in Saskatchewan.

THE STRATEGY OVERVIEW

The Vision: a vibrant tourism industry offering year-round compelling and memorable Saskatchewan experiences.

The goals:

1. Strengthen the product base and the global positioning of Saskatchewan through innovative product and visitor experience development.
2. Increase revenue from tourism year over year by attracting new markets, increasing the length of stay and generating a greater level of return from each trip.
3. Reduce seasonality and spread the economic benefit of tourism across the province through strategic facilitation of growth.
4. Raise awareness of the significance of tourism by heightening the focus on its economic and cultural value.

The approach:

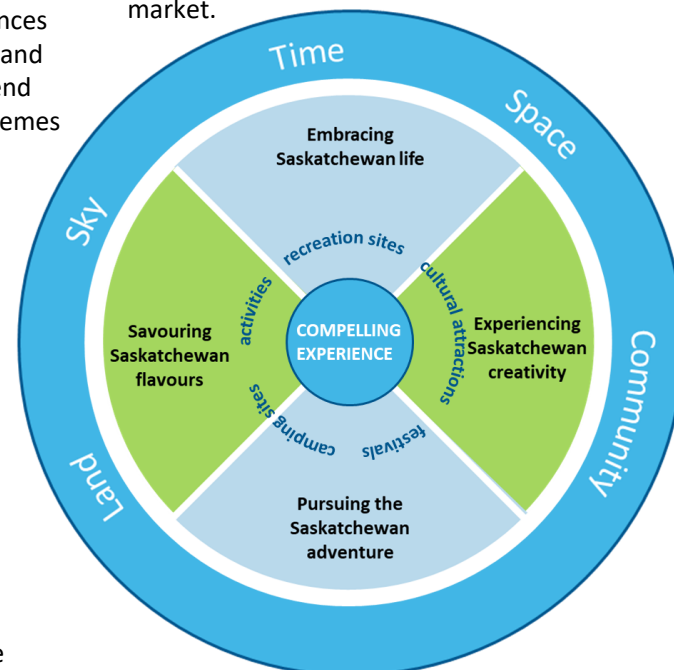
Move toward *new horizons* through adopting an experiential focus that brings the story of Saskatchewan to life, differentiates the province in a compelling way, and is underpinned by a commitment to addressing all aspects of the value chain that impact on the delivery of memorable Saskatchewan experiences. This requires a broad look at the enabling context, transportation, supporting infrastructure, and the overall readiness and capacity of industry.

Developing this experiential focus requires a deep understanding of what differentiates Saskatchewan, and an identification of a new approach that builds on the unique attributes of the province.

Today's visitors are looking to connect emotionally with Saskatchewan and its people. The underlying essence of the province has been encapsulated in the brand and provides the context for the narrative – the story that destination experiences should collectively reveal. The brand pillars, 'land and sky', 'time and space' and 'community' lend themselves to supporting four experiential themes that together embody all the richness and diversity of landscape and culture that Saskatchewan has to offer.

1. **Embracing Saskatchewan life** – life shaped by our land and sky, and by time and space. A life that reflects our resilient and entrepreneurial spirit, our Indigenous nations, and our diversity of settler and immigrant cultures.
2. **Pursuing Saskatchewan adventure** in a land that offers endless opportunity to enjoy the outdoors under the vast canopy of skies year round.
3. **Savouring Saskatchewan flavours** in our fusion of foods and drinks that reflect the diversity of our cultures and traditions, and our prairie bounty.
4. **Experiencing Saskatchewan creativity** that has been inspired by our land and sky, time and space, and our community life.

This shift in focus is fully aligned with Saskatchewan's best market prospects. Segmentation analysis has identified three primary domestic markets that can be grown through a stronger commitment to develop new product and experiences. They are known as Short-Haul Suburbanites, Minivans and Memories, and Affluent Families. Taken together they represent a footprint of almost 27% of the domestic market, in addition to the already strong Lakes and Locals market.



In the US, the growth opportunities are associated with two segments that have a high level of interest in fishing and hunting – Upscale Families and Golden Years. Overseas, UK, Germany and China represent the markets with strongest growth potential.

DRIVING GROWTH – THE CORE PRIORITIES

The strategic focus in moving forward must be on the **development of compelling experiences facilitated by a vibrant industry** – one that is supported by enabling mechanisms and leveraging existing momentum.

The planning framework identifies five core priorities – all of which are designed to contribute significant value to current practices and to set the stage for adding a whole new dimension to existing assets. These five priorities are:

1. Empowering partners
2. Creating transformation
3. Leveraging momentum
4. Advancing experience development
5. Strengthening the enablers

An integrated approach based on these five priority areas will create an animated destination that will arouse new interest and will inspire new levels of visitation.

Empowering partners

We aspire to:

- A dynamic partnership between the provincial government, local governments, the Indigenous community, business operators and supporting agencies – one that is empowered through a deep understanding of the opportunity for growth, the cultural and economic value of tourism, and a common vision.
- Visionary leadership from Indigenous communities that has a transformative impact on the positioning of Saskatchewan as a destination.
- A strong and unified industry that works collaboratively and adopts a pro-active approach to achieve sustainable growth.

Actions

1. Develop and promote a comprehensive understanding of the economic and cultural value of tourism and the nature of the tourism ecosystem to ensure that all stakeholders are increasingly motivated to work collaboratively and proactively towards growing its significance to the province.
2. Highlight the government's commitment to tourism through working cross-government to amend the Province's high-level vision statement to include tourism.
3. Enhance opportunities for ongoing cross-ministry and government agency dialogue on tourism development.

4. Strengthen linkages with industry, including opportunities for dialogue, communications and networking initiatives.
5. Support initiatives to strengthen Indigenous leadership within the tourism industry.

Focusing on transformational projects

We aspire to:

- The development of at least one transformational project that will radically shift the perception of the marketplace toward Saskatchewan, provide a compelling reason to visit and create new momentum for growth.
- An increase in visitation and visitor spend, particularly in relation to out of province and international visitors, as a result of such developments.

Actions

6. Identify at least one transformational project that would have the potential capacity to provide a compelling reason to visit for long haul markets, and begin the process of assessing its viability.

Four transformational concepts arising from stakeholder consultations were highlighted for consideration:

- Dark Skies observatory resort
- UNESCO Global Geopark designation
- Protein Museum (aligned to the protein industries super-cluster)
- An iconic Multi-Day Winter Snowmobile Tour

Leveraging momentum

Destination and product development in Saskatchewan cannot be approached from a “one-size-fits-all” perspective, given the complexities within the natural, business and community landscape. It is therefore recommended that the initial strategic focus is on destination areas where there is a good base to build on, clear aspirations for growth, and where a certain level of critical mass already exists. Selective piloting will further assist in developing successful programs and initiatives that can be replicated.

We aspire to:

- Strong and sustainable regional destination areas with critical mass of year round compelling and memorable Saskatchewan experiences.
- Supportive and pro-active local governments and communities within the destination areas.
- Targeted policies and tourism programs that have been piloted and refined in a way that ensures successful implementation and positive impact on growth.

Actions

7. Prepare and maintain a list of destination areas that are currently poised to take on destination and product development projects.
8. Refresh existing and develop new planning resources that assist DMOs in undertaking product and destination development.
9. Develop a pilot project approach to launching major new initiatives.

Advancing experience development

We aspire to:

- A clear positioning narrative that animates the brand, and an experience development framework that facilitates the development of compelling, brand aligned experiences.
- Strong regional and cluster-based destinations offering year-round experiences and generating increased demand.
- Experience development support mechanisms that increase the economic viability of destinations and businesses alike.
- Partnership-based dialogue and a collaborative approach to leveraging tourism assets and inherent strengths in a way that supports the long-haul market position.

Actions

10. Build a strong positioning narrative that will animate the brand and its three pillars (land & sky, time & space, and community), and use this narrative to establish an experience development framework for the province.
11. Begin a process of visitor experience development planning – select a cluster-based destination area and initiate the work on a pilot basis.
12. Identify Saskatchewan’s unique stories through a Story Project that is designed to support regional visitor experience development and enhance the brand and its pillars.

13. Restructure the AWEShop program to support the implementation of the Visitor Experience Development Plan(s).
14. Work with partners to establish a strategic high-level approach to developing cluster-based experiences that will highlight the four experience elements.

The following areas were identified in the planning discussions as having particular opportunity for further development:

- Life in the north
- Winter in Saskatchewan
- Food and farming
- Indigenous tourism
- Creative and cultural heritage sector.

Strengthening enablers

We aspire to:

- A strong enabling environment that plays a key role in supporting a vibrant tourism industry.
- A cohesive approach to destination development that is based on strengthening the competitiveness of Saskatchewan and its appeal to national and international visitors.
- A commitment to delivering a seamless experience where the various components in the supply chain are all effectively integrated.

Actions

Business development

15. Coordinate a strong partnership-based business development program that is aimed specifically at supporting the implementation of the Strategy, strengthening entrepreneurship, and growing the tourism economy particularly within the context of cluster-based destinations.

Investment attraction

16. Work collaboratively to develop and implement an investment attraction strategy.

Capital funding opportunities

17. Build a business case for the establishment of a new tourism development fund to be used to support product and experience development initiatives aligned to the Strategy, and work towards establishing this new provincial funding program.

Human resources

18. Continue to work pro-actively with partners to address tourism labour demand growth projections, and focus on developing skillsets that will enhance the visitor experience and add value to this product development strategy.

Collaboration and networking

Supporting infrastructure and services

19. Develop procedures that allow for the identification and mapping of needs for new or improved infrastructure and visitor services.

20. Work with partners to disseminate information on smart practice and non-traditional solutions where there is a case for transferable value.
21. Continue to work collaboratively to strengthen all aspects of transportation and access to and within the province.
22. Work with government partners and sector associations to strengthen the appeal of existing nature-based tourism assets by improving supporting policy and infrastructure.

Within each of these action areas, further tactics highlight the activities that need to be undertaken, and case studies illustrate examples of good practice.

MEASURING CHANGE

A systematic approach to performance measurement is essential to fully understand the linkages between the projects, programs and services being proposed and the ultimate goal of growing the tourism economy in the province. A framework for measuring change needs to look at how actions lead to results, and will involve understanding the relationship between inputs, activities, outputs, and outcomes.

Intended outcomes and how they contribute to goal achievement is the primary focus.

A performance measurement framework will include internal and external reporting and communications activities.

A final overview of implementation is presented in the concluding section.

