GOING PLACES

MAY 2021



Felipe Gomez blazes new trails as 2021 Saskatchewanderer

Mary Taylor-Ash reflects on eight years with Tourism Saskatchewan

Scenario planning bolsters Saskatchewan's tourism sector restart and recovery

Saskatchewan operators adapt to challenges by diversifying products and experiences

TOURISM Saskatchewan

SASKATCHEWAN'S TOURISM INDUSTRY NEWSLETTER

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COVER IMAGE

Felipe Gomez, 2021 Saskatchewanderer

Past issues of Going Places are available on Industry.TourismSaskatchewan.com/news/ going-places-newsletter.

and 10, the traditional lands of the Cree, Dakota, Dene, Lakota, Nakota and Saulteaux peoples, and the traditional home of the

TABLE OF CONTENTS

Tracy Breher named Executive Director of Destination and	Destination and Workforce Development
Workforce Development2	Saskatchewan operators adapt to challenges by diversifying
Message from the CEO	products and experiences10
Mary Taylor-Ash reflects on eight years with	Code of ethics and code of conduct guide professional
Tourism Saskatchewan3	outfitting in Saskatchewan1
Felipe Gomez blazes new trails as 2021 Saskatchewanderer4	Order bulk copies of the 2021 Saskatchewan Travel Guide
In Conversation	New business resource hub provides streamlined access to
Jim Bence explains Hospitality Saskatchewan's	industry programs and information1
new advocacy role5	Sustainable practices add value to tourism businesses and
Research and Trends	experiences1
VisitorView data depicts Saskatchewan travel patterns in 20206	Plan now for winter tourism experiences and offerings1
Tourism employment faces uphill climb to recovery7	Remembering Hal Stupnikoff1
Marketing Saskatchewan	Saskatchewan oral history project receives Governor General's
Scenario planning bolsters Saskatchewan's tourism sector restart	Award1
and recovery8	World Travel & Tourism Council issues guidelines for workplace
Driving business and visitation in 20219	inclusion and diversity1

Tracy Breher named Executive Director of Destination and Workforce Development



Tourism Saskatchewan is pleased to welcome Tracy Breher to the role of Executive Director of Destination and Workforce Development. Breher worked at Tourism Saskatchewan from 2001-2016 and fulfilled a number of positions, including Director of Quality Assurance and Director of Industry Relations. She spent the past four years at Saskatchewan Polytechnic, where she was Director of Marketing and Client Excellence, then Associate Vice President of Communications and Marketing.

Breher is responsible for Tourism Saskatchewan's Industry Development team and its education division, the Saskatchewan Tourism Education Council (STEC). She follows Carol Lumb, who retired in December 2020. Lumb dedicated more than 33 years to advancing tourism education programs and career opportunities, and was at the helm of STEC since its inception in 1990.

MESSAGE FROM THE CEO

Mary Taylor-Ash reflects on reflects on eight years with Tourism Saskatchewan



At the end of June, I will turn off the lights in my office one last time and step through the doorway into retirement. Looking back on my time with Tourism Saskatchewan, I am grateful for the meaningful friendships and memories. One thing that really stands out is the generosity of people who welcomed me to Saskatchewan in 2013 and instantly made me feel "at home." I have learned valuable lessons and grown from my experiences here.

Tourism is well-known to have the ability to transform us. Places and people make an indelible impression on those who visit. When we travel somewhere new, we want to immerse ourselves in the experience and learn about that place, the culture and the people. Most often, we want to give something back to the experience – leave a part of us behind. Perhaps that is why we so often long to return to places that touch us deeply.

Saskatchewan has given me more than I could have imagined eight years ago. The people here are some of the finest you will meet anywhere. They volunteer in enviable numbers. They organize events like no one else in this country - curling, hockey and, most notably, football! Saskatchewan spirit and enthusiasm for the home team is simply unmatched.

The size and diversity of the landscape took me by surprise when I moved here in 2013. So many Canadians are unaware that Saskatchewan has such an abundance of lakes and trees - from the impressive lodge pole pines (my favourite) to the lush boreal forests.

There are many highlights from my Saskatchewan adventure. I had the good fortune to take a pontoon boat trip in the Waskesiu area and have a shore lunch in one of the most beautiful settings along the Hanging Heart Lakes.

The 2013 Saskatchewan Roughriders Grey Cup win was an experience I will not forget. That whole week leading up to the championship game was incredible. The energy in Regina and throughout the entire province was "over the top" – I have never witnessed a group of people who love a sports team so much.

It was a privilege to work with stakeholders in all parts of the province and representing a range of industries - event planning, arts and culture, parks, accommodations and more. They are so dedicated to their communities and to making Saskatchewan a welcoming destination. I admire them so very much.

Whether I was attending a Shakespeare on the Saskatchewan production in Saskatoon on a sultry summer night or witnessing the RCMP Musical Ride at Fort Walsh National Historic Site, there was a special energy and spirit. These are memories that I will cherish.

I was fortunate to work with members of Tourism Saskatchewan's Board of Directors who took their roles very seriously and always provided the support I needed to do my work.

More than anything, I appreciated working alongside a team of colleagues who made me proud everyday. The staff here are committed to doing the best, day in and day out, to promote and grow an industry.

I hope that I leave things a little bit better than when I started. A part of my heart will always be here in Saskatchewan. Thanks for giving me a wonderful eight years!

Mary Taylor-Ash



Felipe Gomez blazes new trails as 2021 Saskatchewanderer







Felipe Gomez and travel companion Fozzy

Felipe Gomez was introduced as the 2021 Saskatchewanderer on April 1. Gomez is originally from Chile and is the first new Canadian in the role. His excitement and enthusiasm for the adventures ahead were evident when the announcement was made. "I can't wait to showcase the diversity of Saskatchewan's fascinating and innovative people and places that made me fall in love with this beautiful province I am so proud to call my home," Gomez said.

Gomez is a musician, educator and content creator with a passion for exploring the world in non-traditional ways. He completed a cross-Canada bicycle tour, bass guitar in tow, then headed to the Arctic and eventually made it to Russia. "Touring solo bass player on a bicycle in hardcore winter conditions – that's my claim to fame," he said.

"I love the boreal forest and anywhere there is a vast, frozen lake to explore," he added. "One of my favourite adventures happened right here in Saskatchewan. When I cycled from Saskatoon to Stony Rapids, I spent three months pedalling across the northern reaches of the province. Along the way, I explored many a country road in northern Saskatchewan. All of the people, landscapes and wildlife I encountered made for a once-in-a-lifetime adventure."

Pre-COVID-19, the Saskatchewander role involved travelling the province extensively, capturing the excitement at festivals and live events, and interviewing masses of people face-to-face. For Gomez, the realities of the pandemic – isolation, necessary health measures and travel restrictions, social distancing – present opportunities to connect with people and share stories in different and meaningful ways.

"With a bit more time and creativity, it's possible to capture and showcase the fantastic entrepreneurs and places that we have here in Saskatchewan," he said. "Long-distance lenses, recording outside, zoom calls – these are all tools I use to create and tell stories. I am using the platform I have now to focus on the inspiring and resilient entrepreneurs across this province."

Livestreaming on Facebook has been a fulfilling way to engage with followers and learn about their favourite Saskatchewan experiences and destinations.

"My favourite thing about Saskatchewan is the people," Gomez said. "I have experienced their kindness all over the province – from being offered a place to pitch my tent to receiving invitations to join the family for dinner and celebrations. After cycling over 8,000 kilometres throughout Saskatchewan, I can happily confirm that the iconic hospitality is genuine. I also love perogies, perhaps even a bit more than Chilean empanadas – but please don't tell my mom about this."

To plan his schedule, Gomez is closely monitoring public health advisories, government guidelines and restrictions, and the progress of the vaccine rollout.

Follow the Saskatchewanderer on Facebook (facebook.com/skwanderer), Twitter (@SkWanderer) or Instagram (@saskatchewanderer). Keep up with the latest blogs on YouTube (youtube.com/user/skwandererofficial) or saskatchewanderer.ca.

Sport. It engages a full-time, four-season "ambassador" whose discoveries are shared on social media and promote the many reasons why

IN CONVERSATION

Jim Bence explains Hospitality Saskatchewan's new advocacy role

In January, the Saskatchewan Hotel and Hospitality Association (SHHA) announced its rebranding to Hospitality Saskatchewan and enhanced mandate to serve as the province's tourism industry association. The SHHA's roots trace back to 1906, when a small group of hotel owners met and confirmed the need for an industry association to confront common issues. Hospitality Saskatchewan upholds that spirit, advocating on behalf of the entire tourism sector.

Jim Bence, Hospitality Saskatchewan President and CEO, shared with Tourism Saskatchewan how the COVID-19 pandemic accelerated plans and presented an opportunity for positive change.

The COVID-19 pandemic brought tourism to an abrupt standstill. How did your focus shift in March 2020?

It shifted the direction of our association in a fundamental way. We had a number of activities planned for 2020 and, suddenly, everything shifted to liquidity for our members. Hotels were an essential service and allowed to remain open, so we focused on getting them the information that they needed to keep staff and customers safe.

A couple of months in, we knew that other aspects of our industry, like restaurants, were going to reopen. Likewise, it was essential to communicate what was in the guidelines and help them understand how to open up safely, keep people safe and prevent the virus from spreading. It was all about how can we keep these folks, who typically have very small margins, viable.

One of the most important things that we did was help negotiate a temporary layoff provision. Tens of thousands of people in Saskatchewan were laid off, almost overnight. Because the province had no temporary provision in legislation, it meant that they were permanently laid off and operators would be required to pay severance immediately. We worked with government officials, who understood the ramifications. There is now a temporary layoff provision in The Saskatchewan Employment Act.

How did the pandemic speed up transition plans and rebranding as **Hospitality Saskatchewan?**

It really put it on jet fuel. For two and half years, we had been working toward becoming a tourism industry association. The pandemic thrust us into a position to speak on behalf of many different tourism operators, whether or not they were members. It was a call to action, to which we responded by immediately taking industry concerns to government, who listened and offered help through several support programs.

What surprised you most about the evolution from a 90-year-old organization serving hoteliers to an industry association representing the full range of tourism businesses?

The biggest surprise was the excitement from the entire industry that they now had a voice, that there was now an entity like ours. We had this in our plan but I don't think we really realized how hungry folks were for a tourism industry association. It was incredibly encouraging that we were on the right track.

What were some of the advocacy wins in 2020? The big ones include the Saskatchewan Small Business Emergency Payment. That was huge, but not just because of us. It was a group advocacy effort involving the Saskatchewan Chamber of Commerce, Canadian Federation of Independent Business and others.

The \$35 million Saskatchewan Tourism Sector Support Program was groundbreaking and meant the difference between closure, for some businesses, and staying open. Also, the Strong Recovery Adaptation Rebate, which was the result of another proposal that we put forward to

One that didn't get a lot of headlines was the VLT commission increase. If you were a Saskatchewan VLT operator, your commission was 15 per cent - the lowest in the country. The provincial government came to the table and raised it to 25 per cent. It's remarkable, the difference that made for smaller operators.

What is important for industry to know about Hospitality Saskatchewan? The tourism sector now has an organization that can actively advocate on its behalf to government. Now that we are here, we can start to take on some of those heavier advocacy pieces and just make sure that government hears what it is that we have to say. We are a membership-based organization and have an opportunity to bring more people "into the tent."

I strongly encourage anyone who is involved in tourism to become a Hospitality Saskatchewan member.

Visit hospitalitysk.ca for more details about Hospitality Saskatchewan and the benefits of becoming a member.





RESEARCH AND TRENDS

VisitorView data depicts Saskatchewan travel patterns in 2020

According to VisitorView, a database developed by Environics Analytics, 1.55 million Canadians visited Saskatchewan and stayed overnight in 2020. They accounted for a total of 5.49 million trips to the province and 13.69 million overnight stays. Compared to 2019, the number of visitors decreased by 23 per cent, the number of trips dropped by 33 per cent, and visitors stayed for 27 per cent fewer nights.1

Figure 1 shows that tourism in urban Saskatchewan suffered much more than in rural regions. Regina and Saskatoon reported 41 per cent and 36 per cent fewer visitors, respectively, while the decline in southeast and northern Saskatchewan was less than 20 per cent.

Across all regions, the number of trips decreased more than the number of visitors. This indicates that when people did travel in 2020, they made fewer trips. There was a smaller decrease in the number of nights than the number of trips to all seven tourism regions, suggesting that visitors stayed longer when they made overnight trips.

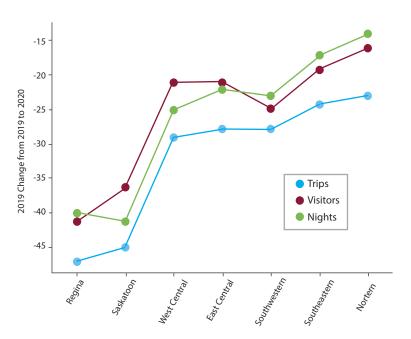


Figure 1. Changes in the number of Saskatchewan visitors, trips and nights in 2020

Interprovincial travel experiences downturn

Travel restrictions due to the COVID-19 pandemic limited interprovincial travel in 2020. The number of visitors to Saskatchewan from Alberta and Manitoba dropped by 30 and 34 per cent on average, respectively, while the number of within-province visitors decreased by 8 per cent.

Looking at the top five visitor origins, Winnipeg accounted for the biggest decline in the number of visitors travelling to Saskatoon, central and northern Saskatchewan – much larger than the decline in visitors from Calgary or Edmonton (Figure 2). This might be due to the strict border restrictions in Manitoba. In March 2020, Manitoba established checkpoints at the five busiest interprovincial crossings and many parts of the province were under "Code Red" or lockdown restrictions, beginning in October.

Local travel compensates for decline in other markets

Although the total number of visitors to all the tourism regions decreased in 2020, Saskatchewan city-dwellers took local trips. Five per cent more people from Prince Albert visited destinations in east central Saskatchewan, while 37 per cent more Lloydminster residents visited the west central region in 2020 than 2019. These two cities overtook Winnipeg and became the fifth largest visitor origin in the east and west central regions, respectively.

Visitor Origins to Each Region in Saskatchewan, 2019 to 2020 Total Provincial Overnight Visitors Decreased by 23%

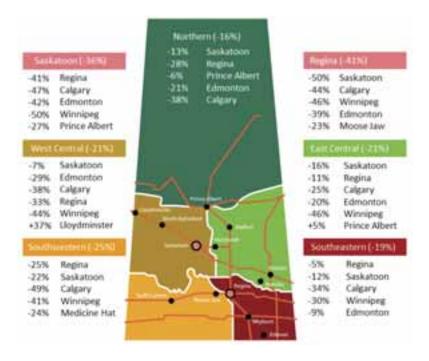


Figure 2. Changes in the number of visitors to Saskatchewan in 2020, Top 5 visit or origins only

Prince Albert is traditionally the third largest visitor origin for northern Saskatchewan, and only six per cent fewer people from the city visited the north last year.

What's on the horizon for travel in 2021?

Regional and hyperlocal travel will continue to be the trend for most of 2021. Destination Canada's survey research shows that the vaccine rollout is an important consideration for people who are thinking of travelling in 2021. In late April, only 23 to 44 per cent of Canadian residents felt safe travelling between provinces.² As COVID-19 vaccines become more widely available in Canada, it is still expected that safety measures (e.g. wearing masks in public, social distancing and enhanced sanitization) will remain in place for some time.

- ¹ Number of visitors = number of persons who visited a region during a period. $Number\ of\ trips = number\ of\ overnight\ trips\ made\ by\ visitors\ to\ a\ region\ during$
- Number of nights = number of nights visitors stayed in a region during a trip in a period.
- f a person travelled from Ontario to Saskatoon and stopped by Regina, the measurement is one $visitor\ to\ Sask at chewan,\ one\ visitor\ to\ Regina\ and\ one\ visitor\ to\ Sask at coon.\ Trip\ figures\ are$ counted likewise – one trip to Saskatchewan, one trip to Regina and one trip to Saskatoon.
- ² Destination Canada Weekly COVID-19 Resident Sentiment Tracker, 2021-04-20.

VisitorView uses privacy-compliant aggregated and anonymous mobile

Tourism employment faces uphill climb to recovery

The COVID-19 pandemic seriously affected tourism employment in Saskatchewan. The total number of Saskatchewan residents employed in tourism careers was 30 per cent lower in 2020 than in 2019. The Conference Board of Canada estimates that employment in Canada's tourism sector will not return to 2019 levels until 2023. One of the hardest hit industries accommodations - is expected to regain 2019 employment levels by 2024.

Serious setbacks in accommodation services and entertainment

In Saskatchewan's tourism sector, the most severely affected industries were the performing arts and the spectator sports sector (-61 per cent), accommodation services (-59 per cent), and amusement, gambling and recreation (-36 per cent).1

Casinos, museums, theatres and other entertainment establishments were subject to complete closures in April 2020 and not permitted to reopen until July. Casinos closed again, by order, in December. Although hotels remained open, interprovincial and international travel restrictions significantly curtailed the demand for overnight accommodations and, thus, the demand for labour.

The food service industry fared slightly better (-26%). At the onset of the pandemic, restaurants in Saskatchewan were permitted to provide take-out and delivery services while many other businesses were required to close. Dine-in services resumed at reduced capacity in June, signalling modest employment gains throughout the summer.

Diverse groups face differences in employment recovery

Low-wage employees (defined as those who earn less than \$16.03 per hour) have felt the

brunt of the labour crisis. Many part-time and low-wage tourism jobs are filled by youth and new Canadians. The pandemic has had a disproportionate labour impact on these groups. Just over 38 per cent of young people, ages 15 to 24, were working in April 2020 - a drop from 58 per cent in February. Recent immigrants were more likely than Canadianborn workers to lose their jobs at the start of the pandemic, mainly because they were newer to the job market.

While employment among both Indigenous and non-Indigenous people initially declined by a similar share, recovery has been slower for the former group. Indigenous women, in particular, face labour challenges, partly because of the demands of homeschooling children or caring for family members during the pandemic.

Prior to COVID-19, 31 percent of people in tourism-related employment were youth, 28 per cent were immigrants or non-permanent residents, and 13 per cent identified as Indigenous. Rebuilding a vibrant, diverse tourism workforce is critical to industry recovery and growth.

Tourism career sentiment suffers

A Leger survey for Tourism HR Canada conducted in November 2020 found that the pandemic has changed perceptions about tourism employment. Thirty-nine per cent of Canadians surveyed view tourism careers more negatively than before the pandemic. Respondents who previously worked in tourism had the least favourable opinions.

With three in four jobs in the accommodation and food services industry involving close physical proximity to others, it is unsurprising that access to vaccinations and safety protocols are top-of-mind when considering a career in tourism right now.

Tourism operators and businesses that demonstrate safety practices to increase consumer and employee confidence will have a competitive edge, once travel resumes. Investing in the development and promotion of tourism careers will be important to rebuilding a strong visitor economy and resilient industry.

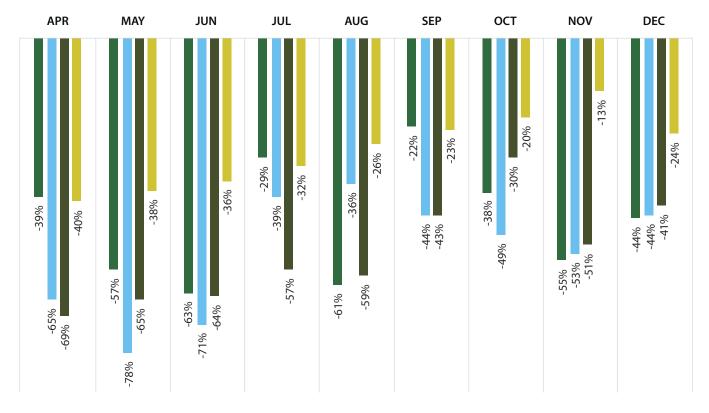
¹ Per cent change between August 2019 and August 2020.

Register for Clean It Right

to reduce the spread of COVID-19, protect customers and staff and help businesses stay open. It is currently being offered for

https://industry.tourismsaskatchewan.com /education-and-training/clean-it-right





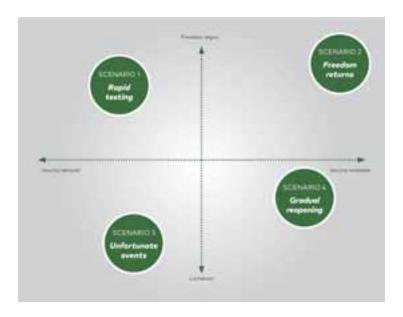
MARKETING SASKATCHEWAN

Scenario planning bolsters Saskatchewan's tourism sector restart and recovery

In April, Tourism Saskatchewan, in partnership with Destination Think, completed a comprehensive Restart Marketing Strategy that outlines approaches to mitigate challenges to the province's tourism sector and speed recovery. The two-year plan identifies short- and long-term actions that support a goal of leading the industry "through recovery from COVID-19 to a place that is better than it was before the pandemic."

The extensive development process involved in-depth research and planning, along with broad stakeholder consultation and collaboration. The full strategy has many complex parts. Together, they drive a mechanism that is flexible and can adapt quickly as circumstances change.

Scenario planning is an important component that ensures thoughtful, strategic responses are in place to address potential setbacks. Simply put, scenario planning is a technique for anticipating and being ready for what can happen next. Four potential scenarios for 2021 and 2022 were created from assessing global and international forces that affect tourism, along with the critical uncertainties of a worldwide pandemic. Vaccine rollout and restrictions on travel are key factors that shaped the scenarios.



"The only consistent aspect of the pandemic is constant change, which requires marketing organizations like Tourism Saskatchewan to anticipate the most likely scenarios and challenges that the tourism sector may face," Amy McInnis, Director of Marketing, said. "Scenario planning helps us to bridge the gap between uncertainty and being prepared for situations that evolve. We can plan multi-phased campaigns and tactics and be ready to put plans into action as soon as travel resumes."

Read the Restart Marketing Strategy summary

The following are brief summaries of the scenarios identified in the Restart Marketing Strategy. Included are sample responses and actions. The bulleted examples are from Tourism Saskatchewan's strategies to assist recovery of outfitted hunting and fishing.

Scenario 1: Rapid testing – Vaccine roll out is successful, borders reopen and national and international travel resumes. Freedom of movement is possible due to advances in rapid testing. Confident travellers set out to explore, while more cautious people seek out COVID-19-safe experiences.

- Broaden awareness messaging in U.S. market, focusing on Saskatchewan's abundance of trophy fish and game; include influence-driven content featuring packages and offers
- · Encourage interprovincial travel
- Augment outdoor travel media support program, targeting U.S. outlets and personalities
- Enhance in-market activities at targeted U.S. marketplaces and events

Scenario 2: Freedom returns – Widespread inoculation against the virus is achieved. A pent-up demand for travel is unleashed. Destinations compete for visitors' attention and dollars.

- Emphasize influence-driven marketing in U.S. stronger sales messaging and calls to action (e.g. book now)
- Augment outdoor travel media support program, targeting U.S. outlets and personalities
- Enhance in-market activities at targeted marketplaces and events
- Encourage interprovincial travel

Scenario 3: Unfortunate events – Vaccine roll out is delayed, variants emerge and lockdowns continue. Best case – in province travel is permitted; worst case - essential travel only.

Tactics:

- Limit messaging awareness only, without a sales push
- Stress Saskatchewan's abundance of trophy fish and game to U.S. market; emphasize that the province's licensed outfitters are eager to welcome quests when it is safe to travel
- Promote angling experiences to Saskatchewan residents, if intra-provincial
- Tailor outdoor media program target personalities and outlets in Canada with reach into U.S. market

Scenario 4: Gradual reopening – Vaccines are available and restrictions lift as it becomes safe to do so. Stability returns at moderate pace with some ebbs and flows.

- Shift awareness marketing to sales messaging as travel restrictions lift
- Promote upcoming seasons and available species to drive bookings
- Tailor outdoor media program to target personalities and outlets in Canada with reach into U.S. market
- Transition to U.S. media push when border opens

For more information about the Restart Marketing Strategy, contact Amy McInnis at 306-787-2199, amy.mcinnis@tourismsask.com.

Driving business and visitation in 2021





Blackstrap Provincial Park

In March, Destination Canada released a report on Canada's struggling tourism sector. titled Revisiting Tourism: Canada's Visitor Economy One Year into the Global Pandemic, the report addresses the harsh plummet of the tourism industry in 2020. At the same time, it offers food for thought on how to turn some of the domestic travel patterns that emerged last year into wins for 2021.

On a positive note, Canadians understand that value of tourism -84 per cent believe that it is very or somewhat important to Canada's economy. People are eager to resume travel – 80 per cent of Canadians plan to travel when it is safe to do so and restrictions are lifted.

Destination Canada and provincial marketing organizations shifted focus in 2020 from targeting long-haul visitors to encouraging Canadians to rediscover local experiences. The report emphasizes the benefit of domestic travel to recovery of the tourism industry, which may not reach 2019 levels until 2025.

Strong domestic travel could accelerate recovery by a year. Destination Canada states that a two-thirds shift of planned spending on international leisure to domestic tourism could make up for the estimated \$19 billion shortfall in the visitor economy and help sustain 150,000 jobs.

Tourism Saskatchewan spoke with Eva Gutsche, principal at STEM Consulting, about strategies and practices to drive business in 2021. Gutsche has partnered with Tourism Saskatchewan on the delivery of a number of in-person workshops (pre-COVID-19) and online webinars. She offers advice on how to capture a piece of the domestic market in the months ahead.

Gutsche stressed that operators need to plan regardless of the unknowns concerning widespread vaccinated populations, reopened borders and relaxed restrictions. Her advice, for now, is to focus on visitors within the province and build on some of the travel trends that sustained businesses in 2020.

Many people who did travel last summer sought outdoor activities and local experiences. "Bicycle, outdoor equipment and RV sales went 'through the roof.' Now that they have the equipment and want to use it, we will see those trends continue," Gutsche said.

Crooked Lake Provincial Park

Another notable pattern was the willingness to drive further to enjoy great outdoor activities, while remaining within the province. The opportunities for tourism operators range from convincing guests to stay extra nights to forging partnerships with nearby businesses to enrich the visitor experience.

Accommodating new markets of travellers, such as families, may require some flexibility and changes to traditional product offerings. "Sometimes it's just looking at your product, your pure asset, differently," Gutsche said, adding that for some fishing and hunting lodges, diversifying experiences in 2020 brought them new visitors – families, photography and nature lovers, etc.

"There is a huge range to consider – from families to young people and any age group looking for something to do," Gutsche said. "If you are in a remote area, is there enough for them to do? If not, what experiences can you develop? Who can you partner with? In your local area, are there other experience providers - canoe or outdoor equipment rentals, cooking or art classes, guided walks? You don't have to own it all - everyone can win from

Showing that safety is top-of-mind and clearly demonstrated by tourism operators is critical to restoring confidence among Canadian travellers and regaining a strong visitor economy. These four key actions, identified by Destination Canada, are important for industry recovery and driving business in 2021:

- 1. Stay informed Follow updates on the status of COVID-19 infections as well as current health and safety regulations. Review consumer research to understand Canadians' priorities and concerns in relation to domestic
- 2. Emphasize safety Highlighting up-to-date, accurate information about travel and safety regulations builds visitor confidence and peace-of-mind. Clear communication about protective measures is a top factor influencing travel.
- 3. Adapt your business Consumer preferences continue to evolve as the COVID-19 pandemic continues. Consider manageable ways to adapt business offerings to meet changing trends and expectations.
- 4. Embrace the shoulder season Experiences offered in shoulder season can compensate for a downturn in peak season travel. Shoulder season options can ease travel hesitancy and appeal to people who wish to avoid peak season activities.

Sources:

Destination Canada. Revisiting Tourism: Canada's Visitor Economy One Year into the Global Pandemic. March 2021. Destination Canada. Rebuilding Traveller Confidence: the Importance of keeping Safety Top of Mind and in Plain Sight.

DESTINATION AND WORKFORCE DEVELOPMENT

Saskatchewan operators adapt to challenges by diversifying products and experiences





Picnic in the Orchard - Over the Hill Orchards and Winery

Tourism Saskatchewan delivers application-based programs that support product development and help operators to make sound business investments based on timely market research. In 2020, its Diversification and New Market Program resonated with applicants who recognized that adapting products and experiences offered some defense against the downturn in traditional travel due the COVID-19 pandemic.

The program aligns with recommendations in the ten-year Destination Development Strategy for Saskatchewan. Eligible market-ready Saskatchewan tourism businesses can apply under the following streams: 1) New Market Attraction; 2) Seasonal Usage Expansion; and 3) New Experiential Product Development. Available funding ranges from \$20,000-\$30,000, depending on the program stream. Successful applicants commit to a minimal equity investment of 30 per cent of the total project budget.

Greater interest in diversification was evident in many of the applications submitted in November and December 2020. Operators expressed clear plans for investing in their business to drive immediate revenue, assure long-term sustainability and be more resilient during challenging times. Tourism Saskatchewan's Industry Development team described the keen interest in investment opportunities as "showing optimism beyond COVID-19." The approved projects will boost Saskatchewan's tourism offerings, particularly during shoulder season, and help the visitor economy rebound.

The Diversification and New Market Program has fifteen projects underway from the intake in late 2020. Total investment in the program is just under \$1 million, with operators contributing nearly \$600,000 to the approved projects that represent a variety of tourism businesses and experiences throughout Saskatchewan. Comments from four of the operators speak to some of efforts to diversify products and rise above challenges.

Over the Hill Orchards and Winery, Lumsden area

Launching Picnic in the Orchard experiences last summer, Over the Hill Orchards and Winery presented a new outdoor option that enabled social distancing and had strong local appeal. Several picnic areas were created on the property overlooking the Qu'Appelle Valley. Visitors could reserve a site and, upon arrival, were equipped with a backpack containing a locally sourced bread and cheese platter, bottle of Over the Hill Orchards wine, and all of the basics (glasses, utensils, blanket, etc). The program resonated with the public on many different levels and enabled visitors to enjoy a safe, relaxed socially distanced excursion.

Plans to expand the offering this year, pending health orders, include partnering with local hotels and transportation providers to offer a Stay and

RV Ice Shack, Sandy Shores Resort, Lake Diefenbaker

Picnic package. "Tourists will be able to stay overnight at a local hotel and have transportation to and from the orchard," co-owner Dean Kreutzer said. "We are also creating a new premium picnic site that has additional amenities, including a gazebo. The pandemic brought local attractions into the spotlight and we want to take this opportunity to improve the customer experience in everything we do. Improved parking, signage, landscaping and an expanded winery menu are only a few of the plans we have in the works."

T&D Amisk Camp, Denare Beach area

New owners of T&D Amisk Camp, Nick and Cindy Ouellet, turned some of the challenges of their first season into an opportunity to welcome new visitor markets and plan for expansion to a four-season destination. "We knew we had to do our best – adapt to what was required to stay open and get the word out locally, regionally and provincially that we had availability for guests. We had no other choice than to just push through and make the best of the situation," Cindy said.

Renovations required investment in hot water systems and plumbing for several cabins to provide more convenient and comfortable accommodations year round. T&D Amisk Camp now offers a selection of winter packages to appeal to a range of guests. The themed packages combine cabin rentals and recreational activities, including ice fishing and snowmobiling. A guided snowshoe or cross country ski excursion takes guests through the boreal forest along the Amisk Lake shoreline or Sturgeon Weir River. "The investment allows for a four-season revenue stream for the business, but may also attract more guests in the summer who want a wilderness fishing experience but also appreciate having upgraded facilities when they return to their cabin after a day on the lake,"

Sandy Shores Resort, Lake Diefenbaker

In February, Sandy Shores Resort rolled its fully equipped RV Ice Shack onto frozen Lake Diefenbaker. The launch created excitement and enthusiasm for enjoying ice fishing in style and comfort. "With an interest in glamping, I thought there might be similar interest in overnight stays for ice fishing," owner Rauncie Kinnaird said. "I wanted to offer an ice fishing experience that would be open to women, girls and anyone else who might not go fishing because of lack of a washroom. It can be a barrier. Now the whole family can spend the day out fishing."

Kinnaird commented on additional factors that influenced the development, particularly the skills and investment required. "Ice fishing usually means you have a truck, shack, specialty rods, and more. It can be difficult for someone inexperienced, especially on Lake Diefenbaker," she said.

The RV Ice Shack makes the sport accessible to more people and enhances winter tourism offerings in the area. It sleeps up to six people, has indoor plumbing, a dining area and kitchen stocked with basics, TV and underwater camera. Guests have options to add professional guiding and a fish fry to their experiences. Spring through fall, it is also available for rent at Sandy Shores Resort.

JT's Beach Café and Tiki Bar, Blackstrap Provincial Park

JT's Beach Café and Tiki Bar is the evolution of JT's Tasty Treats, a lessee in Blackstrap Provincial Park since 2017. The business initially operated out of an ice cream trailer, then expanded to a 6-metre sea container. Increased demand for food, beverages and concession services in 2020 signalled the purchase of second container and plans to increase the kitchen/prep area and create a new bar and restaurant. The tiki-themed design includes an outdoor dining area that enables distancing between guests, along with a

rooftop patio to showcase the view of Blackstrap Lake and surrounding landscape.

"We are extremely excited to push the limits of what a food and beverage supplier at a beach can provide," owner and manager Joshua Turner said. "Partnering with Tourism Saskatchewan is an amazing opportunity and allows us to give park visitors a better experience. With the massive growth at Blackstrap last summer, we honestly couldn't keep up. This enables us to get better equipment, expand our seating areas and provide better experiences for all who visit."

For more information about programs that support tourism experience development and diversification initiatives, contact Denise Stroeder at 306-787-2825, denise.stroeder@tourismsask.com.

Code of ethics and code of conduct guide professional outfitting in Saskatchewan

Saskatchewan's outfitting industry suffered devastating losses in 2020 due to the COVID-19 pandemic. Closure of the Canada/U.S. border left many outfitters without clientele for the season.

According to the Saskatchewan Commission of Professional Outfitters (SCPO), 61 per cent of outfitters did not open their camps in 2020. Twentyfour per cent of those who did open lost between 75 and 100 per cent of their average earnings. The industry reported \$129 million in lost sales

Federal and provincial support programs offered some relief; however, the downturn in business affected many northern residents who work in industry. An estimated 2,500 people who are directly employed by Saskatchewan outfitters were not hired in 2020.

Planning for post-pandemic recovery and building a robust, resilient industry means ensuring a solid, upstanding reputation for Saskatchewan outfitters and their services and experiences. The SCPO's member-driven Code of Conduct Program sets the bar on professional standards and delivering on the promise made to visitors. Saskatchewan outfitters are required, as a condition of licensing by the province, to be aware of and comply with the SCPO Code of Conduct.

Which comes first - code of ethics or code of conduct?

A code of ethics applies to broad principles that are a guide to making business decisions. The SCPO's Code of Ethics, developed with the approval of members, defines member obligations and ongoing commitment to maintaining their standing as industry professionals. They pledge to uphold high standards in four areas: 1) environmental and resource stewardship; 2) guest experiences; 3) marketing: and 4) professional responsibilities.

The SCPO's Code of Conduct applies the ethics principles to practices that define expectations of outfitter conduct and complement the legal requirements outlined in the provincial regulations for Saskatchewan's outfitting industry. Having these measures in place enables a fair review process to investigate claims of misconduct and resolve disputes in a just, consistent manner. The review process is non-judicial. It administered by a conduct review panel of industry representatives and stakeholders.

Code of Conduct criteria are outlined under the following five categories:

- Truth in advertising ensuring accurate and honest representation of products and services in all marketing, promotion and advertising efforts
- Guest expectations providing written confirmation of agreement between operator and client
- General public acknowledging the Government of Saskatchewan's role in managing wildlife and fish resources on behalf of Saskatchewan people and respecting the rights and interests of the public
- Conservation and resource use promoting ethical use of resources, the importance of conservation and the role of professional outfitters in wildlife conservation
- Respect for licensed users Respecting the legal rights of other licensed users of wildlife and fish resources

SCPO members attest to their adherence to the codes as part of their annual membership renewal. Tourism Saskatchewan and SCPO management collaborated in 2020 on developing online modules that present the material in a concise format. Outfitters can easily access the modules on Tourism Saskatchewan's Learning Management System and complete the material at their convenience.

"The SCPO's member outfitters are committed to professionalism this is key to the SCPO brand," Roy Anderson, Acting CEO said. "Their commitment to the Code of Ethics and Code of Conduct is one example of how 'professional' is defined by member outfitters. Each year, members discuss additional opportunities to build on this. The next opportunity being researched is to have a minimum of one person in each camp who has First Aid, CPR and AED certification."

Visit https://scpo.ca/ for more information about the Saskatchewan Commission of Professional Outfitters.

Growth strategy for Saskatchewan outfitting sector in development



Order bulk copies of the 2021 Saskatchewan Travel Guide

The 2021 Saskatchewan Travel Guide is now available to display and share with visitors. Order free bulk quantities of the guide by completing a bulk order form, available on Industry. Tourism Saskatchewan.com, and submitting the information to patti.peesker@tourismsask.com.

Featuring engaging copy and impressive photographs, the 2021 Saskatchewan Travel Guide offers top travel suggestions in southern, central and northern Saskatchewan, as well as holiday highlights in Regina and Saskatoon. Each section also includes winter content and feature articles that put the spotlight on the area's key experiences - from outdoor adventures and family fun in Saskatchewan parks to road trips and agri-tourism.

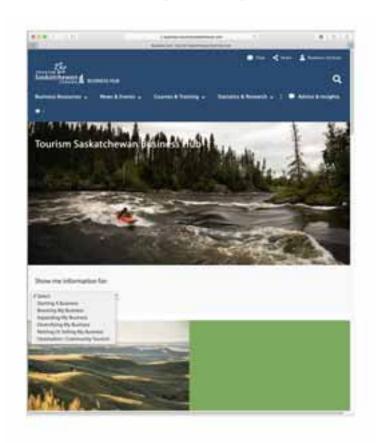
For added convenience, conceptual maps in each section include Saskatchewan regional, provincial and national parks, as well as major attractions throughout the area. An extensive index provides travellers with contact information for the businesses and attractions mentioned in the guide.

New in 2021 is a page offering tips for safe travel throughout Saskatchewan during the COVID-19 pandemic, with a focus on respecting public health orders and guidelines.

The 2019-2020 Official Saskatchewan Road Map and 2021 Saskatchewan Fishing & Hunting Map are also available to order.



New business resource hub provides streamlined access to industry programs and information



Tourism Saskatchewan's longstanding industry website, Industry.TourismSaskatchewan.com, is transitioning to a new business resource hub that offers quick access to a greater range of tools and information. The hub is designed to provide operators with a personalized user experience that saves time, avoids confusion and gives them information and resources to advance their business.

All of the information and resources on the former website, such as STEC training programs, experience development funding opportunities, research reports, marketing and event partnership program details and more, have migrated to the business hub.

A Business Resources section includes information on starting, expanding, operating and marketing a tourism business. Details about funding sources related to COVID-19 recovery, product development and product or market diversification are also there. Search the Courses and Training section for STEC offerings.

A new section, Advice and Insights, features blog posts on a variety of topics training success stories, case studies, marketing tips and more.

Located at Business.TourismSaskatchewan.com, the business hub is a one-stop source for advice and information to speed recovery of the tourism industry and bolster's Saskatchewan's competitiveness when travel resumes.

Sustainable practices add value to tourism businesses and experiences



Grasslands National Park

The two-year Restart Marketing Strategy for Saskatchewan's tourism sector (more on page 8) is split into periods of defence and offence. Defence measures applied in 2021 aim to protect and recover Saskatchewan's existing tourism industry. Planning post-COVID-19 and long-term offence strategies means building on the province's competitive strengths and exploring new travel markets.

Sustainable tourism is important to consider for obvious environmental and ethical reasons but also to position businesses, destinations and communities favourably with conscientious travellers.

The United Nations World Tourism Organization (UNWTO) defines sustainable tourism as taking "full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities." 1

The UNWTO states that sustainable tourism should:

inter-cultural understanding and tolerance.

- 1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity. 2. Respect the socio-cultural authenticity of host communities and their built and living cultural heritage and traditional values, and contribute to
- 3. Ensure viable, long-term economic operations, providing socioeconomic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

How does sustainable tourism development influence the travel decisions made by consumers? Are they willing to put their money where their conscience is?

David Fennell, a tourism researcher at Brock University, states that consumers are "now more than ever, demanding low-carbon options in accommodation and transportation, greener technologies, and other sustainability dimensions." Fennell asserts that in a post-COVID world, "future success in tourism is being embedded in a sustainability agenda."2

In November 2020, Destination Canada began asking Canadian travellers about their thoughts on sustainable travel.³ The results indicated that when considering where to travel, 47 per cent of respondents consider the negative environment and societal impacts that they personally have on the destinations they visit. Thirty-seven per cent of respondents said they select travel destinations that have invested in socially responsible tourism practices, and 33 per cent are willing to pay a higher price for an environmentally friendly travel option.

Sustainability clearly plays an increasingly prominent role in tourism choices. For operators, sustainability is not just about respecting the environment. It also means making better business choices. Adopting sustainable practices can attract more visitors, enhance the customer experience and save money.

¹UNWTO. Sustainable Development, https://www.unwto.org/sustainable-

²The Brock News. "Brock expert says decisive action required to make post-COVID-19 tourism sustainable." June 2020.

³Destination Canada. 2020 Global Tourism Watch, November 2020.

Sustainability Checklist

- Source and promote the use of eco-friendly products and practices

RESEARCH AND TRENDS (continued)

Plan now for winter tourism experiences and offerings







Prince Albert National Park

Tobin Lake

Cypress Hills Interprovincial Park

Planning winter activities and experiences to attract visitors starts months before the snow falls. Many operators already have their winter offerings available for booking by travellers who like to plan in advance.

In January, Tourism Saskatchewan worked with Environics Research to gather travel insights from Saskatchewan and Alberta residents through an online survey and discussion board. Four different winter experiences were tested – winter getaways; cross-country skiing; wilderness and hiking; and ice fishing. The following summary of findings is helpful to designing appealing winter packages and offerings.

Winter getaways offer a break from routine

Among the four winter concepts tested, winter getaways had the greatest appeal and highest relevance. People are looking for either fun/excitement or escape/relaxation in getaway trips. Closeness to home is an asset – most people do not wish to drive long distances in winter. The variety of accommodation types and experiences offered in this theme appealed to various types of families with different budgets. Among Saskatchewan residents, winter getaways created a sense of excitement, nostalgia and the desire to explore. Additionally, winter getaways usually allow for a mix of outdoor and indoor experiences that make the trip more of a vacation.

Cross-country skiing is accessible and family-friendly

Survey participants with children related most to the cross-country skiing theme. Saskatchewan offers abundant trails and rental equipment for skiers of all levels, and has a strong ski community. Skiing was considered an ideal family activity and seen as a budget-conscious option for day trips, and its accessibility and affordability makes it appealing. It is an activity that can also be turned into a getaway trip for people with more flexible income.

Wilderness experiences appeal to some but not all

Wilderness and hiking had niche appeal. Experiences in the wilderness create excitement and fuel a desire for exploration among people who enjoy hiking and outdoor adventure. For those with mobility issues, have small children or are not outdoor enthusiasts, these types of experiences are limiting and less appealing.

Ice fishing viewed as a uniquely Saskatchewan experience

Ice fishing appealed to niche interests, generating excitement among enthusiasts for the sport. It was considered an experience unique to Saskatchewan. Some survey participants were surprised and curious to learn that there are places in the province that welcome beginners. The chance to try ice fishing without making a substantial investment in equipment is motivating. Enthusiasts perceive ice fishing to be a great activity to do with family and friends. Albertans surveyed indicated that they would come to Saskatchewan for ice fishing only if a full vacation experience is available, including comfortable lodging and the option to eat some of their catch.

Here are tips for optimizing winter tourism packages and activities:

- Offer a variety of accommodations that appeal to different budgets and preferences.
- Describe details in language that appeals to targeted interests, and name packages accordingly (e.g. romantic getaways). Feature imagery that will resonate with the intended visitors.
- Include family friendly activities. Show images of families and children having fun. Family excursions should include details about available activities, equipment, etc., and offer indoor "snow day" options.
- Provide more specific descriptions about things to do and available experience – different activities, amenities, package details, available extras, and more. These details are particularly important to Albertans, who want a variety of activities to make the trip worthwhile. Packaging is key to attracting markets from further away.
- Highlight quality images of cabins, fireplaces and scenes that suggest a cozy atmosphere.

Remembering Hal Stupnikoff

Saskatchewan's tourism industry lost a proud champion with the passing of Hal Stupnikoff in December 2020.

Born in Prince Albert, he developed a love for sports and outdoor activities at a young age. Fishing and hunting were two of his passions. In 1980, Stupnikoff began working with the Saskatchewan Outfitters Association (SOA), where he served as executive director until his retirement in 2013.

His experience as a teacher shaped his role with the SOA. He understood the importance of educating and training those who provided service in the outfitting industry in Saskatchewan.

Stupnikoff was passionate about issues that affected the outfitting industry and deeply committed to address the challenges confronting Saskatchewan outfitters. Through the years, he visited nearly every camp in the province and was instrumental in developing the Canadian Outfitting Association. His work involved promoting Saskatchewan outfitting, and he travelled extensively throughout the U.K., U.S. and Germany.

"I really got to know Hal over the years as we travelled to numerous trade shows across North America," Harvey Kroll, owner of Hatchet Lake Lodge,

said. "He was definitely the organizer of our group. You could not find a better person to lead the Saskatchewan Outfitters Association all those years. His love of nature and passion for hunting and fishing gave him a profound understanding of the industry and the issues it faced. We knew he always had our best interests at heart."



Stupnikoff was one of the founding board members of the Saskatchewan Tourism Education Council in 1990, and was valued for his vision, direction and guidance. He was instrumental in the development of occupational standards and certification training for provincial hunting and freshwater angling guides.

Tourism Saskatchewan extends condolences to Hal's wife, Fay, and their children and grandchildren.

Saskatchewan oral history project receives Governor General's Award



Saskatchewan Doukhobor Living Book Project, WDM Saskatoon. Photo by Ryan Androsoff.

In November, the Saskatchewan Doukhobor Living Book Project was awarded the Governor General's History Award for Excellence in Museums: History Alive!

The project began in 2016 and was a partnership between the Western Development Museum (WDM), Spirit Wrestlers Productions and the University of Saskatchewan. Its goal to preserve the oral history and spiritual traditions of Saskatchewan Doukhobors was achieved through the creation of a documentary film, an immersive audio/visual soundscape and a museum exhibit. These elements were shared with the public in an exhibition at the WDM Saskatoon in 2019.

The soundscape documented a typical Doukhobor "moleniye" or prayer service, as practiced by Saskatchewan's Independent Doukhobors. It captured the oral history of Doukhobor elders and explored how the community has evolved since Doukhobors immigrated to Saskatchewan from Russia 120 years ago.

The Independent Doukhobor's unique approach to "cultural harmonization" enabled them to integrate socially, economically and politically while retaining key features of their religious beliefs and cultural practices. Highlighting their story through the Saskatchewan Doukhobor Living Book Project underscores the WDM's vision for "a Saskatchewan where everyone belongs and histories matter."

The Governor General's History Awards were created in 1996 to honour excellence in educational and public programming about Canadian history and heritage. They are administered by Canada's History Society and presented by the Canadian Museums Association.

World Travel & Tourism Council issues guidelines for workplace inclusion and diversity

"Diversity is about recognizing that each individual has something distinctive to contribute; while inclusion ensures that those individuals are seen, welcomed, respected and appreciated. Effective inclusion is essential to build tolerance, and ultimately to end discrimination."

World Travel & Tourism Council

In December 2020, the World Travel & Tourism Council (WTTC) released guidelines for inclusion and diversity in the travel and tourism sector. The guidelines apply to business of all sizes and support an inclusive work environment for all employees.

The document's introduction emphasizes the advantage to businesses and organizations that strive for a diverse and inclusive workplace. Benefits include greater productivity, increases in creativity and innovation, and a happier workforce. Ensuring that employees feel safe and free to be who they are is important. The WTTC states: "It is good for business, enabling the sector to serve its clients and stakeholders better, and it is the right thing to do."

Comprehensive, but straightforward, the guidelines are categorized under four pillars: 1) Developing a Supportive System; 2) Creating Safe Spaces; 3) Supporting an Agile System; and (4) Exemplifying Inclusion and Diversity. They can be used as a checklist to gauge progress on workplace policies or set goals for improvement.

Creating a safe, nurturing environment inside of a business reflects positively on the outside. Employees who feel valued, respected and empowered are ambassadors for a business and destination. They are pivotal to meaningful first impressions and enjoyable visitor experiences.

The following are just a few of the WTTC's recommendations:

- Incorporate diversity and inclusion into organizational values and in all aspects of the business.
- Have overt leadership support for and communication of diversity and inclusion initiatives.
- Create an environment that facilitates difficult but respectful conversation about diversity and inclusion.
- Provide a safe space for employees . . . Ensure that individuals are not ridiculed or disadvantaged for sharing honest feedback and experiences.
- Minimize bias through the implementation of outcome-based goals.
- Have inclusive marketing, media and communication standards to dignify representation of all people, elevate authentic voice, avoid cultural appropriation and recognize dynamic diversity and intersectionality.
- Collaborate with pertinent groups and communities around products that relate to local Indigenous cultures.
- Partner with organizations that have like-minded approaches to diversity and inclusion, where possible.

View the WTTC Inclusion & Diversity Guidelines in full at wttc.org.

UNWTO Ethical Principles in Tourism

Principles outlined in the United Nations World Tourism Organization (UNWTO) Framework Convention on Tourism Ethics, published in 2020, are definitive statements on responsible, sustainable and universally accessible tourism.

- Article 4 (1) "The understanding and promotion of ethical values common to humanity, with an attitude of tolerance and respect for the diversity of
 religious, philosophical and moral beliefs, are both the foundation and the consequence of responsible tourism . . ."
- Article 5 (1) "Tourism . . . is an irreplaceable factor of self-education, mutual tolerance and for learning about the legitimate differences between peoples and cultures and their diversity."
- Article 5 (2) "Tourism activities should respect the equality of men and women; they should promote human rights and, more particularly, the
 individual rights of the most vulnerable groups, notably children, the elderly, persons with disabilities, ethnic minorities and Indigenous peoples."

Sources:

World Travel & Tourism Council. Inclusion & Diversity Guidelines. 2020. https://wttc.org/Search-Results?search=inclusion%20and%20diversity%20guidelines UNWTO. Framework Convention on Tourism Ethics. 2020. https://www.e-unwto.org/doi/pdf/10.18111/9789284421671

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