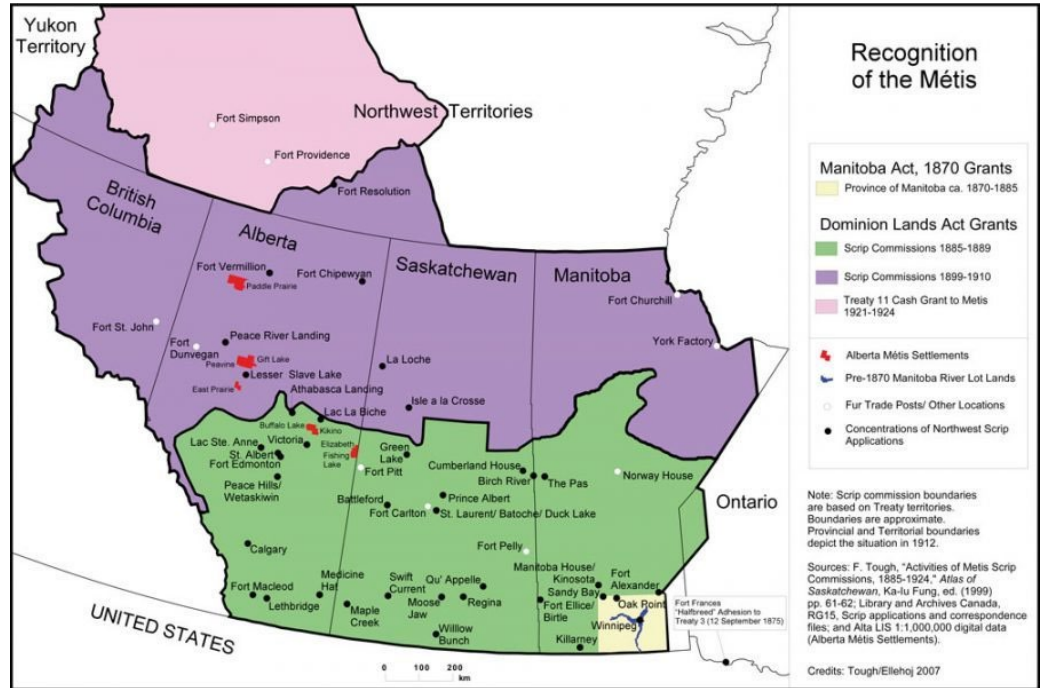
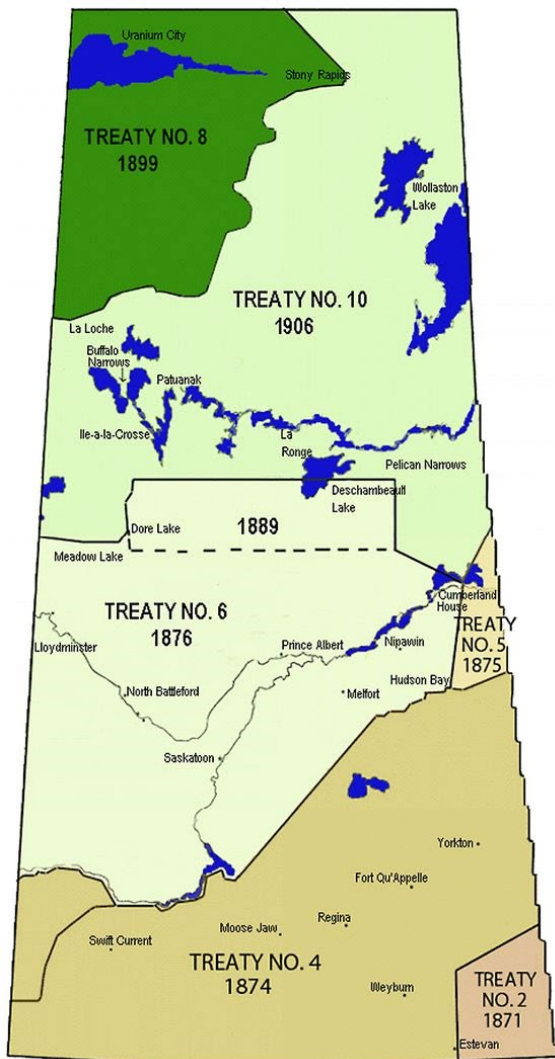




Tourism Saskatchewan
Opportunities in Times of Change
September 28th, 2021

Treaty territories and Métis homelands



Tourism is big business in Saskatchewan

\$2.24 B

in visitor
spending
annually

13 M

visits to and within
the province
annually

71,800

Saskatchewan
residents employed
in the tourism
sector (2019)

A strong, vibrant tourism sector . . .

Supports local
businesses

95 per cent of tourism and tourism-related businesses are small- or medium-sized and many are independently owned or operated.

Creates jobs

Tourism makes up over **12 per cent** of total employment in the province. Three in five people working in the tourism sector are in full-time positions.

Stimulates economic
growth

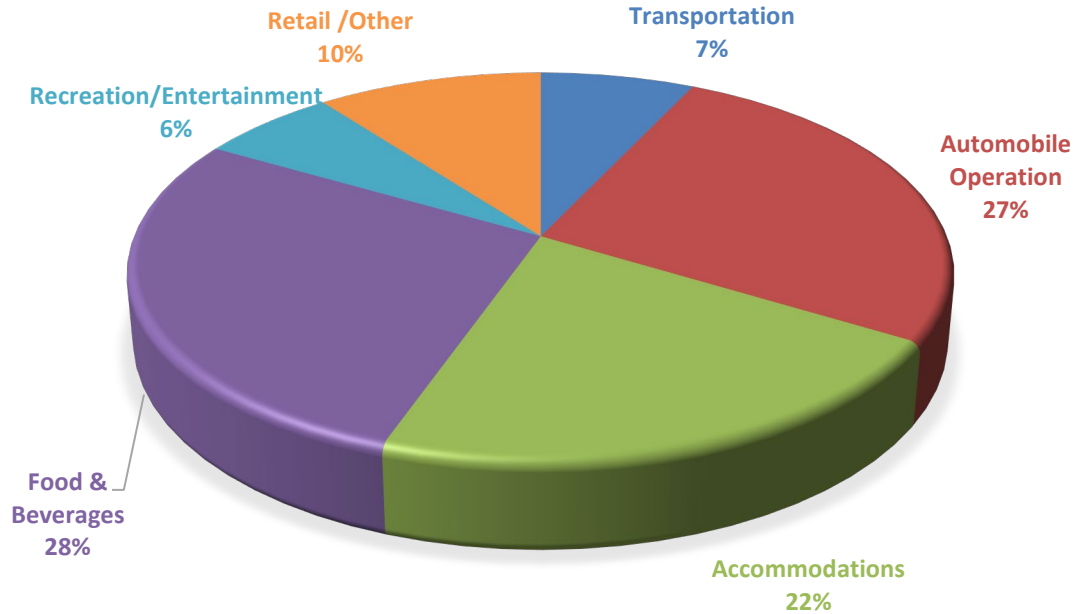
Tourism is an export industry, injecting **\$723 million** in export dollars annually into the local economy and stimulating growth throughout the province.

Preserves and
celebrates our history

With over **3,200** attractions, events and businesses, Saskatchewan's tourism industry showcases our history, culture and traditions to the world.

Visitor Expenditures by Category

2018 VISITOR EXPENDITURES BY CATEGORY



Areas of Concern

Areas particularly impacted by COVID-19:

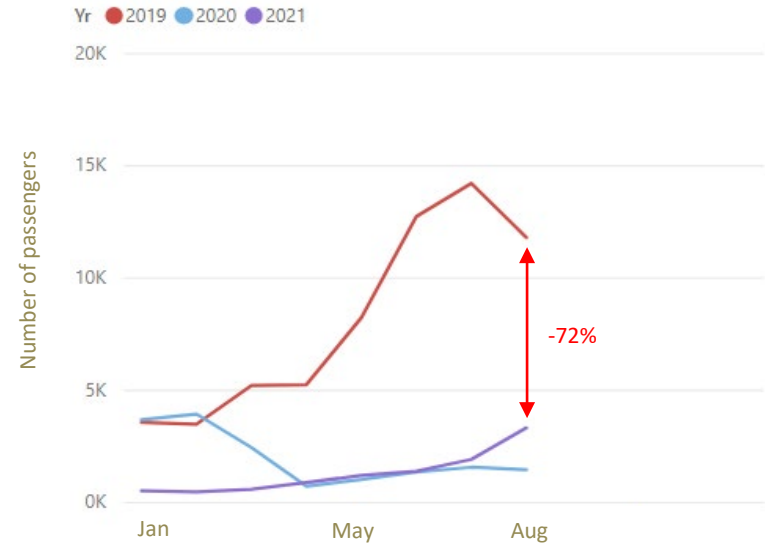
- Outfitting
- Hotels and hospitality
- Business travel
- Events and sports tourism
- Airports/air access



International Travel

- Visitation from overseas and the United States stalled in 2020 and most of 2021 due to travel restrictions.
- The Canada/US border re-opened to fully vaccinated travellers in August 2021.
- Canada opened to fully vaccinated overseas travellers in September. Data is pending.

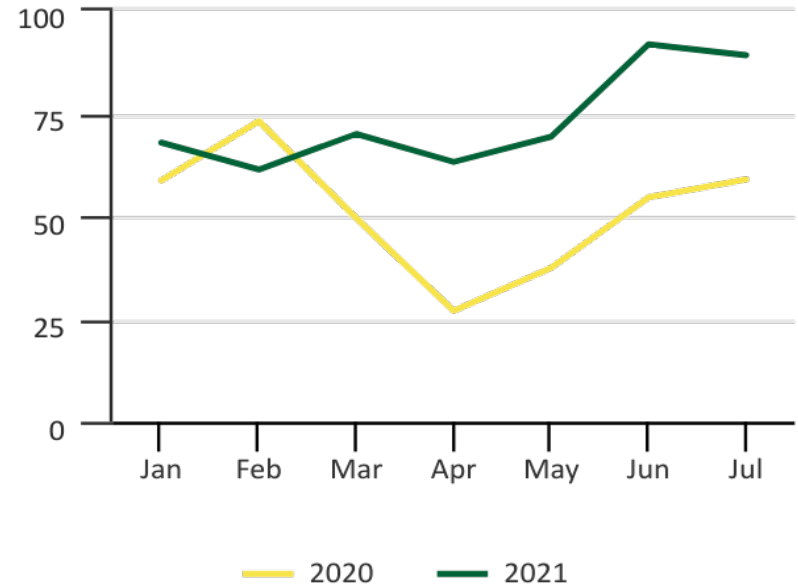
Saskatchewan Border Crossings in US-licensed Automobiles



Consumer Confidence

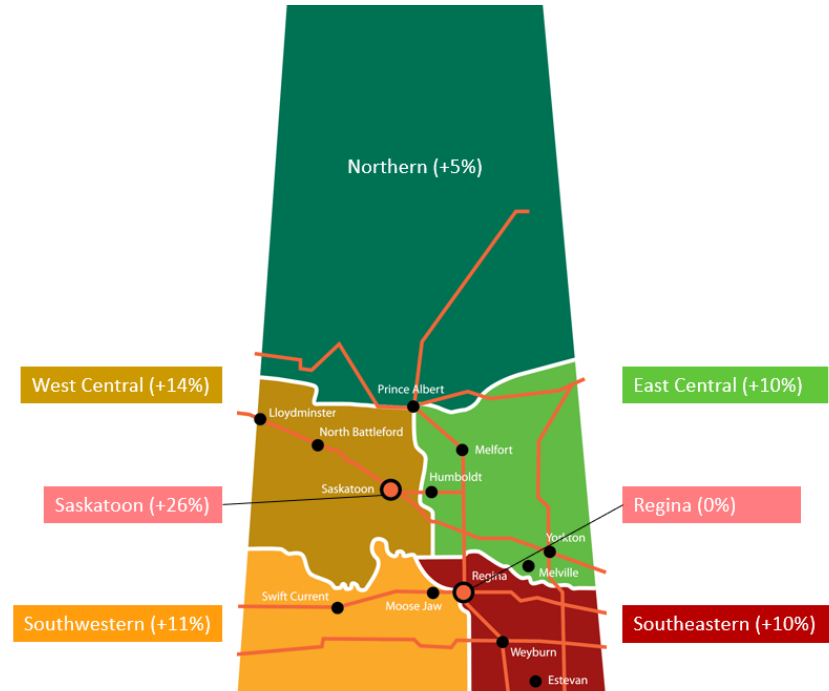
- Measures consumers' levels of optimism regarding current economic conditions.
- Consumer confidence steadily increased between April and June, coinciding with strong vaccination uptake and low case numbers.
- It is expected that consumer confidence will decline in the fall.

Index of Consumer Confidence



Regional Travel Trends

- Slow first quarter, followed by solid recovery in the second quarter.
- Domestic overnight visits in Saskatchewan increased by 10% from April – July 2021, compared April – July 2020.
- Strong summer will be tempered by the fourth wave in the fall.



Labour Market

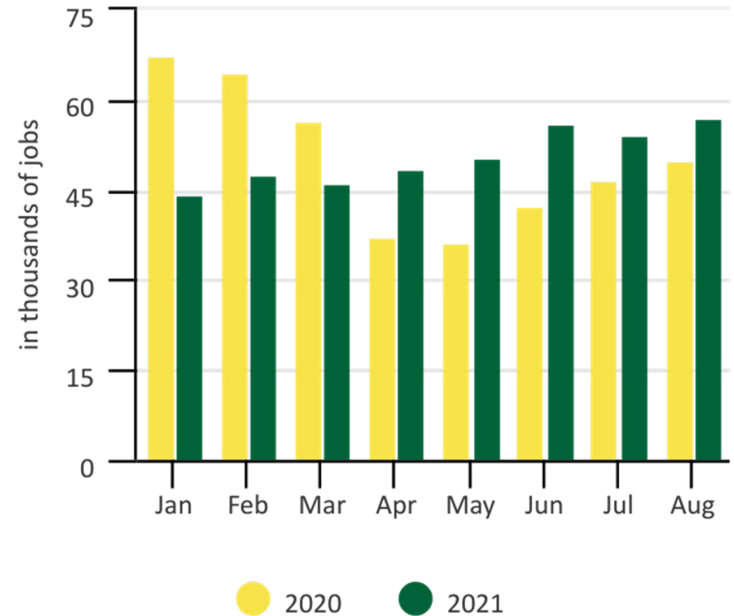
- The tourism sector was experiencing severe shortages of workers prior to COVID-19. In 2018, Tourism HR Canada predicted a labour shortage of almost 7,400 jobs left unfilled in Saskatchewan by 2035.
- Employment in the tourism sector will not return to 2019 levels until at least the year 2023.



Tourism Employment

- Tourism employment grew steadily between March and June
- Peak employment occurred in August, reaching 57,200 full- and part-time positions. This is an increase over 2020, but still 20% lower than 2019.

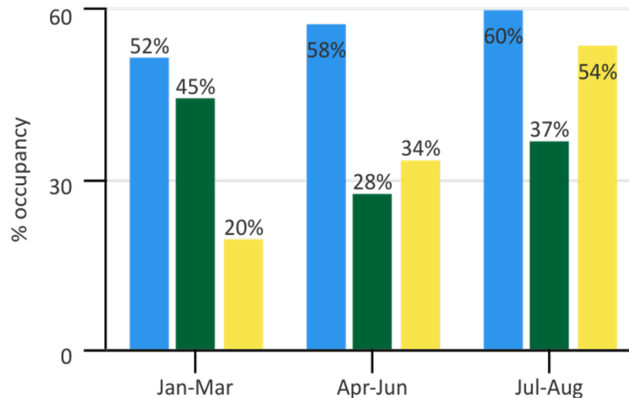
Full and Part-time Tourism-Related Employment



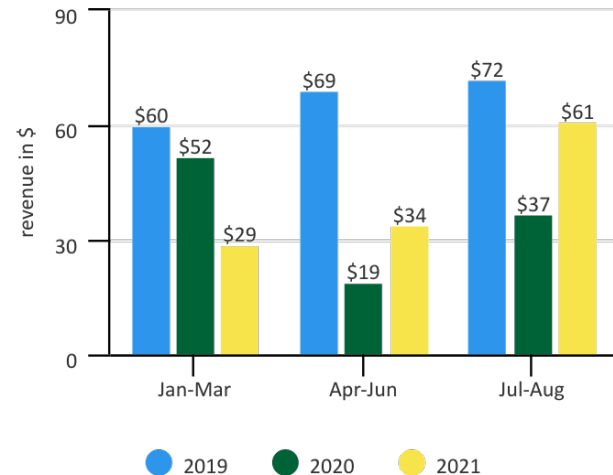
Accommodations Sector

- Average hotel occupancy increased to 54% in July and August, driven largely by restrictions lifting and the return of events.
- Despite large gains, hotel revenues continue to lag behind pre-pandemic levels.

Average Occupancy at Select Fixed Roof Accommodations



Hotel Revenue Per Available Room (RevPAR)

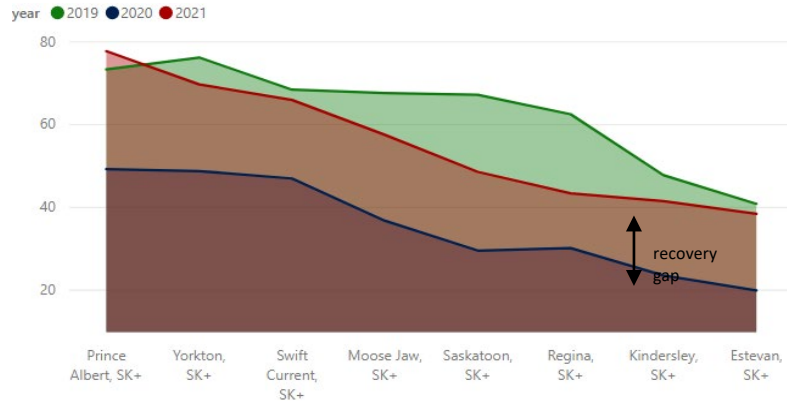


Regional Recovery

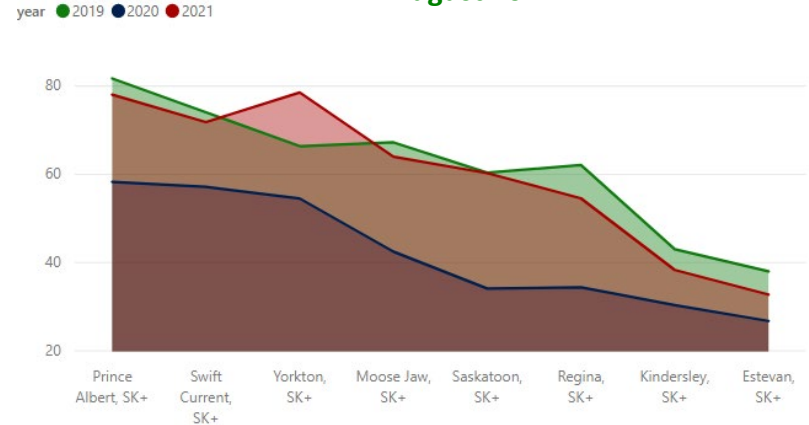
- Recovery across the province has been uneven.
- The return of events in August greatly assisted the recovery of Regina and Saskatoon.

Hotel Occupancy by City

July 2021

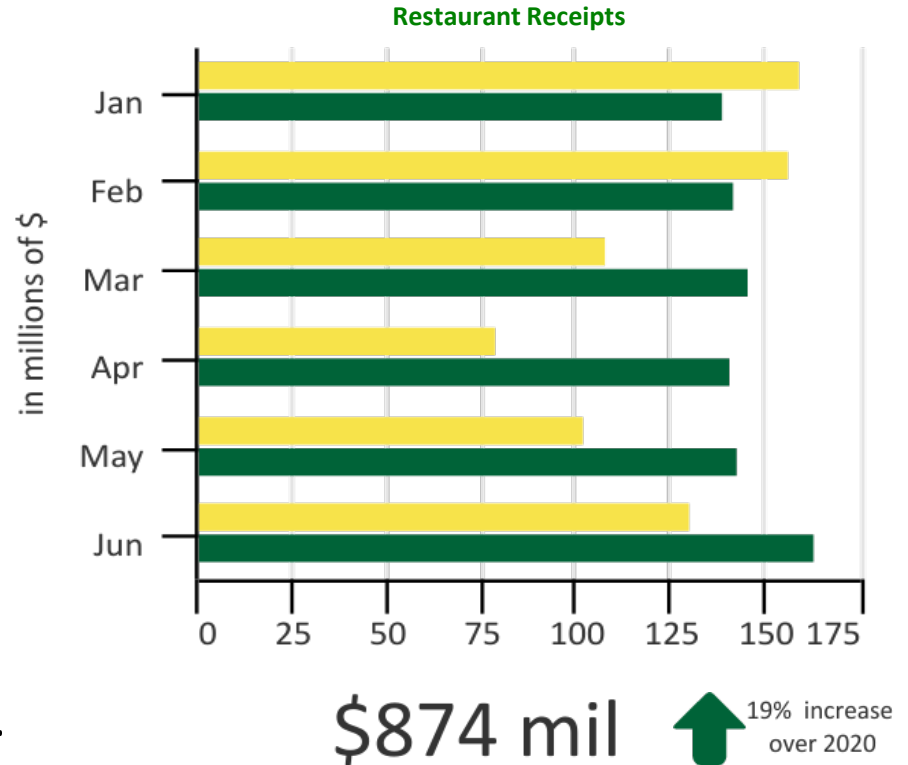


August 2021



Food and Beverage Sector

- The food and beverage sector experienced stronger recovery compared to other tourism sectors.
- Many restaurants were able to pivot their operations, offering take-out or outdoor dining options.
- Even with capacity restrictions lifted, many businesses continue to offer COVID-friendly dining options.



Consumer Trends

- Post-pandemic travel has evolved. There is a growing demand for deeper, transformative experiences that change travellers for the better.
- A sample of opportunities includes:
 - Indigenous tourism
 - Nature-based learning
 - Culinary tourism



Consumer Trends

- Due to COVID-19, there has been a rapid acceleration of digital innovation, compressing years' worth of technological advancements into a few months.
- Some outcomes include:
 - Widespread adoption of video conferencing/hybrid conferences
 - Increased expectations for seamless, frictionless booking and travel

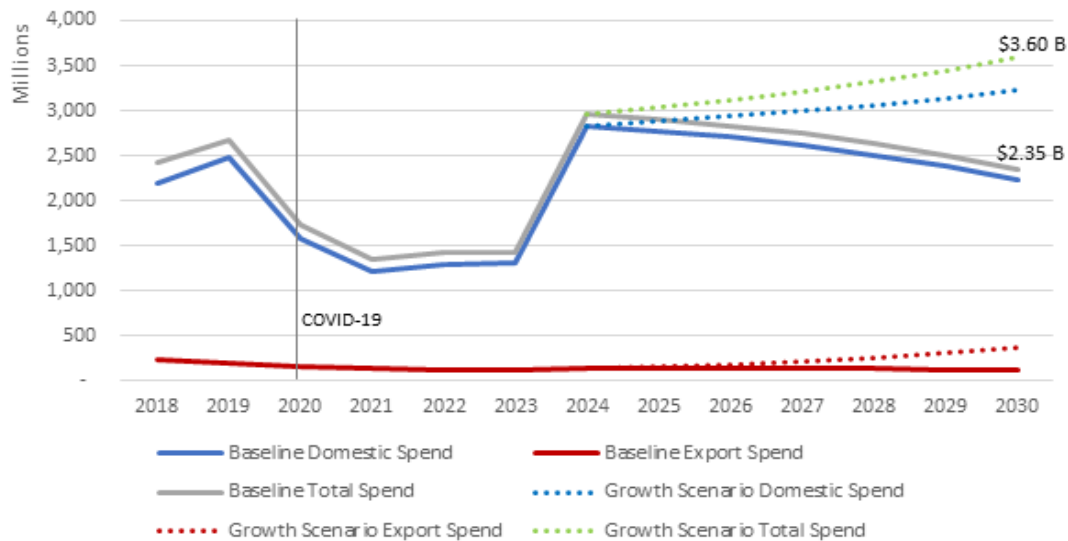


Saskatchewan's Growth Plan

- Target: \$3.6B in visitor expenditures by 2030
- Saskatchewan market is mature – growth opportunities primarily in shoulder seasons
- Other Canadian markets and export markets (U.S. and overseas) will drive growth



Visitor Expenditure Forecast (2018-2030)



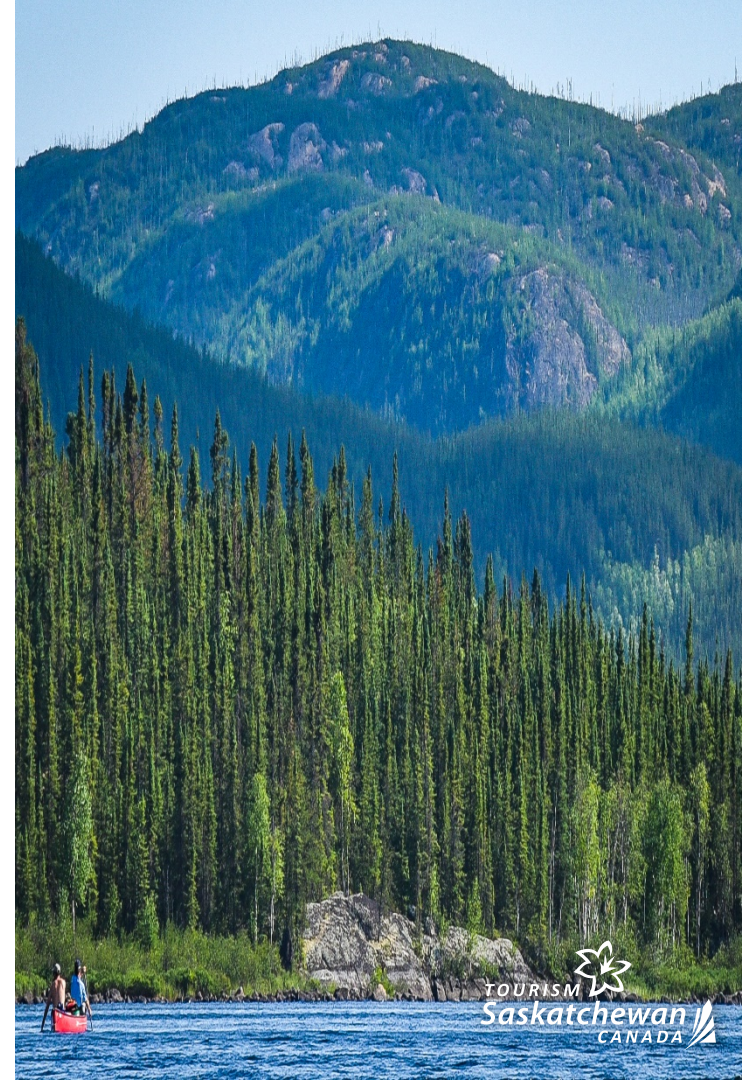
Growth Plan Opportunities

- Invest in capital improvements in provincial parks
- Support Wanuskewin's UNESCO World Heritage Site bid
- Develop Indigenous tourism in partnership with the Indigenous Tourism Association of Canada.
- Facilitate sustainable destination area development



Growth Plan Opportunities - continued

- Support event attraction – business, cultural, and sporting
- Build industry readiness for export markets through education, training, market intelligence, and in-market support
- Build a strong workforce to meet current and projected needs



Growth Plan Opportunities - continued

- Target tourism marketing to increase visitation in growth markets
 - Restart Marketing Strategy
 - Market segment refresh
 - Niche market research and identification



A few takeaways

- Continue to build customer loyalty now
- Partner with surrounding attractions/be creative
- Make the purchase experience simple
- Take advantage of programs



Tourism Saskatchewan Business Hub



Dig Deeper

- Niche and passionate markets
- Identifying local talent to diversify tourism potential
- Best practices in content marketing
- Building your business (funding and training programs)



Comments and questions

