

DELIVERING ON THE PROMISE

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

2019 - 2029



This beautiful and vast land draws us together..... where time slows - and as you relax, you connect with the people around you

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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:

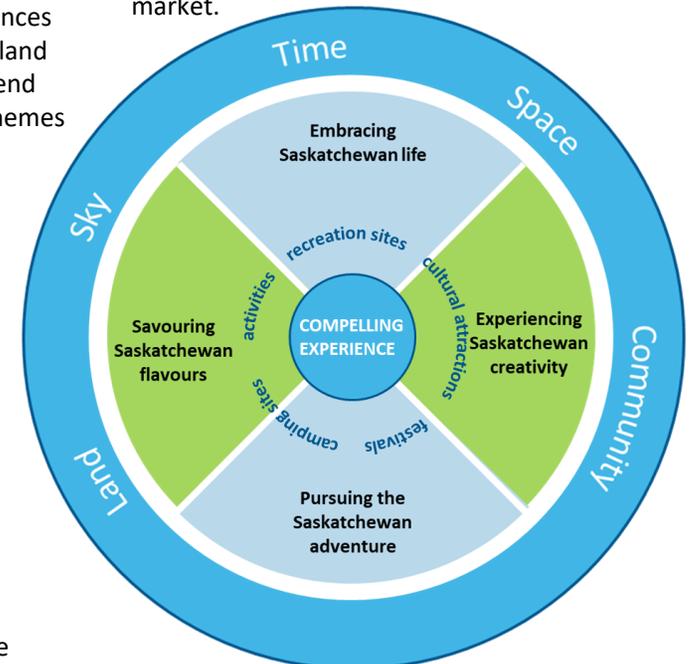
Move toward *new horizons* through adopting an experiential focus that brings the story of Saskatchewan to life, differentiates the province in a compelling way, and is underpinned by a commitment to addressing all aspects of the value chain that impact on the delivery of memorable Saskatchewan experiences. 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.



1. Introduction

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. The Strategy will strengthen product and destination competitiveness, and is based on:

- Deepening the understanding of the unique value proposition of Saskatchewan;
- Establishing recommendations on products and experiences that will ensure sustainable tourism growth;
- Identifying intervention mechanisms that will provide the most value in facilitating the growth and development of tourist products;
- Highlighting stakeholders and partners best positioned to provide leadership, vision and access to resources for strategy implementation.

The significance of tourism

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 and is the province's fourth largest exporter with sales to out-of-province visitors reaching \$608 million. The sector accounts for 67,000 related jobs, which represents over 10 per cent of the current working population in the province – more than twice as many people as the mining and oil and gas sectors combined, and almost twice as many as the manufacturing sector.

The revenues are generated across the province from over 4,200 attractions, events, and tourism-related businesses – businesses that include hotels, bed and breakfasts, restaurants, museums, art galleries, parks, fishing and hunting outfitters, nightclubs, casinos, sporting events, shopping malls, festivals, craft shops, golf courses and other endeavours. With many of these businesses being independently owned and operated and over 95% regarded as small- or medium-sized companies, the economic impact of tourism is felt throughout from smaller rural communities to the larger urban centres of Regina and Saskatoon.

The benefits of strategic growth

Tourism has become one of the world's largest and fastest growing economic drivers. Strong outbound tourism demand and increased spending from both emerging and advanced markets will drive growth in the years ahead. The United Nations World Tourism Organization projects an average 3% annual growth between now and 2030.

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.

Growth needs to be pursued strategically to deliver real and sustainable economic, cultural and environmental benefits. To this end, the Strategy sets forth an ambitious pathway for creating new products and experiences that will drive future tourism demand. It recognizes the need for a new way of looking at opportunities and a collaborative approach to implementation – one that will strengthen the inputs of capital, talent and innovation from government, tourism businesses, and communities alike. Working together, this Strategy can make the difference in moving towards *new horizons*.

2. 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.

The background research and the stakeholder consultation focused on understanding and assessing the following:

- The market and industry trends and factors that influence the growth of tourism in Saskatchewan.
- The current visitor markets and the performance of the industry.
- The competitiveness of the destination in terms of its strengths and opportunities for growth, and the underlying issues and constraints facing the tourism sector.
- The role of the government and industry in facilitating growth.

Taken together, this work which has been documented in the Background Report answers the key question: “Where are we now?”

Trends and factors influencing tourism in Saskatchewan

A wide range of trends and factors interact to influence the growth of tourism and the appeal of a destination. Identifying and understanding the relevant trends and factors is critical in meeting market expectations and positioning the industry to maximize new emerging opportunities.

- **The pervasive trend that is now impacting all forms of tourism is the ever-increasing demand for experiences and the growth in experiential travel.** This market trend shows no signs of slowing down and can be seen across all generations and all types of travel. It has firmly shifted into mainstream travel as visitors seek authentic and immersive ways to connect with a destination – its people, its culture, its very essence and personality.
- **Desire for achievement** – travellers are looking to move beyond these immersive experiences with the local community to feel a sense of achievement, and to accomplish something they have never done before. This is shifting the focus onto personal transformation.
- **Changing demographics** – generational trends continue to shape travel behaviour. While the large Baby-Boom cohort (born between the mid 1940s to mid 1960s) continue to take the most trips, the Millennials (born between the early 1980s to early 1990s) are driving demand for short getaways, weekend trips and add-on leisure trips to business travel. The 50+ demographic will continue to be a driving force in shaping travel as they seek more specialized and niche experiences. However, it is the Millennials that are redefining the concept of adventure travel, how visitors connect with locals, and the role of technology in travel.

I look around the place as I wait. The red-brick building that houses the café began its life in 1912 as a butcher shop, but it has also been a library and the town office. Now, it's a cozy restaurant (and liquor store) where (the) chef ... cooks Cajun food, while his wife serves guests, and their daughter uses a four-top table as her playroom. The kitchen serves Southern comfort such as Acadian pickerel, lentil gumbo and jambalaya. And the honey in the cornbread? It's from the apiary down the block.

Jenn Smith Nelson, "Small-town Saskatchewan serves up surprisingly exotic eating experience", The Globe and Mail, 2018



- **Niche sectors are evolving and growing** as travellers seek authentic, memorable and immersive experiences.
 - The interest in **culinary tourism** is one particular area that has seen remarkable growth. Food and drink have come to represent strong elements of a destination's intangible and tangible heritage – its landscape, its terroir, its ethnicity and cultural history, and many of the embedded values associated with the destination. It is this mix of culture, tradition, authenticity, and sustainability that is giving culinary experiences such a strong presence in many destinations, and a growing basis of differentiation. From opportunities to learn new skills and meet local producers to new forms of meal-sharing, this is an area of tourism that is set to expand.
 - **Adventure tourism** is undergoing similar growth as its definition shifts to be less about activity associated with risk and more towards learning, fulfilment and being in a natural environment. Developing an experience that combines activity, nature and culture while delivering on challenge, achievement and transformation, authenticity and novelty, and wellness is what is increasingly being sought by the market. In particular, interest in "microadventures" – small and affordable getaways – is seeing marked growth.
- **Winter tourism** is becoming a new peak season according to Intrepid – and it is now about much more than simply the traditional winter resort tourism. Rather, it is about experiencing winter festivals and elements of ordinary life in the winter season within the context of innovative packages and distinctive hotel and resort offerings.
- **Disruptive technologies** – digital advances and innovations are offering new solutions, and when paired with services that cater to the sharing economy and shifting societal values, the impact is significant. Travel disrupters such as Airbnb and Uber are changing the travel landscape and are creating more choice for accommodation, transportation and experience components of a trip. Similarly, new advances in Artificial Intelligence have implications for many areas of tourism from gaming and augmented reality experiences to robotics. The concept of driverless vehicles has yet to be fully explored as a factor impacting tourism.
- **Responsible tourism** – as iconic destinations face visitor management issues and issues of sustainability rise to the fore, the concept of responsible tourism has become front and centre of global discussions on growth. Destinations that can combine intriguing experiences within serene landscapes and pleasant bustling urbanscapes have a growing distinctive advantage.

Current markets and performance of the industry 2017



13.3 million domestic visitors

60% are day visitors, versus the national average of 32%



5.3 million domestic overnight visits

68.7% of these visits originate from within Saskatchewan
Length of stay average is 3.08 days



\$2.4 billion total traveller expenditure

\$1.88 billion domestic traveller expenditure

\$1.1 billion from domestic overnight stays and \$1.88 from total domestic
Average trip spend for overnight visits is \$210

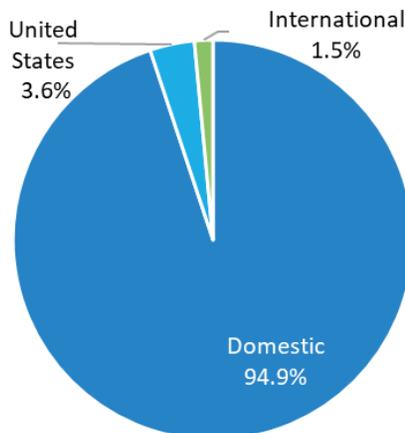


67,000 tourism-related jobs

This is over 10% of the working population

The industry has room to grow and improve.

- In 2014, Statistics Canada estimated that tourism's contribution to provincial GDP in Saskatchewan was 1.3% - one of the lowest contributions in Canada. The national average was 1.9%.
- Both US and international visitation as a share of total visitation rank as the second lowest in Canada.
- The province has a high dependence on short-haul, regional visitors with 90% originating from within Saskatchewan and its two neighbouring provinces – Alberta and Manitoba.
- While international visitation is low, the markets are diversified – the top three markets are China, France and the United Kingdom.



- **Hotel indicators** are subdued with the province having the country's lowest average daily rates and revenue per available room. Occupancy rates are second lowest, with Alberta slightly below. While these indicators are of significant concern, it is not merely a reflection of the tourism industry. Rather, the recent decline in the resource-based sector and associated business travel has brought the indicators from some of the highest levels for the country, to the lowest.
- **Air passenger volumes** are trailing the national growth trend – a 14% growth between 2011 and 2017, compared with a national average growth rate of 32%, and a notable under-performance in relation to Alberta (29%) and Manitoba (21%).
- **Saskatchewan is primarily an outdoor destination** with activities such as camping, spending time on the beach, boating, fishing, visiting national and provincial parks all significantly out-performing the national average. Hunting and fishing remain core to the activity participation of US visitors.

The product offering

Saskatchewan – its what memories are made of:

The scent of fresh morning air. The lake that seemed to go on forever. The family in the site next to yours, the ones you couldn't wait to see every summer. Nothing brings people closer together than camping in Saskatchewan.

Retrace the path of voyageurs. Rapids to shoot, lakes to cross, winding trails to traverse, all immersed in the stories that bring nature and history together.

(Tourism Saskatchewan)

Embrace the youthful vitality and cultural richness of Saskatoon and Regina and engage in the quintessential small town experience.



Saskatchewan's tourism product consists of approximately 4,200 facilities, events, attractions and tours that collectively contribute to the visitor experience. In addition, there are many community amenities, natural features and tertiary services that provide an important, supporting role in the tourism economy.

Products are distributed differently across the province – with fishing, hunting, outdoor adventure and camping predominate in the north; while hospitality services, events and meeting and convention facilities are more prevalent in the major urban areas.

The south west has the greatest diversity of products and services, while the central regions offer a mix of urban/rural activities. Regina and Saskatoon have a critical mass of accommodation facilities and hospitality services that create cluster conditions amenable to future product development.

Saskatchewan has a strong base of cultural assets with more than 200 museum, galleries and indoor venues that complement the small villages and towns that dot the Prairie landscape in the south and the boreal forests of the north.

The park system, including provincial, national and regional parks, is a critical product category. This is particularly true for the outdoor adventure and camping markets that often target parks as destinations and primary use areas.

Indigenous tourism is available in places and a number of communities have made great strides in building compelling destinations, but there is considerably more upside potential yet to be developed.

Gaps and opportunities for improvement have less to do with the province's core product capabilities than with their suitability for delivering new and exciting experiences. Many communities in Saskatchewan have interesting stories to tell and things to see, but most visitors will be unaware or have little opportunity to piece together individual activities and events into their own special experience. Packaging and tour opportunities are limited. The fact that many facilities and services are only open during peak summer visitation makes it very difficult to break out of the current seasonal business model. The major challenge for future product development will be to lower these barriers to new investment and innovation that will create the destination experiences of the future.

The brand

The essence of Saskatchewan has been effectively captured in the brand launched in 2015.

Brand Position: This beautiful and vast land draws us together

Brand Proposition: Time slows – and as you relax, you connect with the people around you

Brand Pillars: Land and Sky; Time and Space; Community

The elements of the brand were reaffirmed in the planning discussions and are regarded as fundamental to the development of product and visitor experiences that will stand out and offer compelling reasons to visit the province.

The **Brand Pillars** offer the basis of what differentiates Saskatchewan from elsewhere and what makes it distinctive as a province.

- **Land and Sky:** These basic building blocks of nature are at the heart of the Saskatchewan brand. From legendary southern badlands and rolling prairie to the majestic northern boreal forest that frames nearly 100,000 lakes – these are the spaces that define us, make us who we are and bring us closer together.
- **Time and Space:** In Saskatchewan, time is in no hurry. Like the magnificent skies above, space seems endless. There is room to breathe and to stretch the imagination. As you disconnect from the stress of a busy, crowded life, you connect with the people around you.
- **Community:** Saskatchewan hospitality runs deep and the spirit of community is a notable characteristic of our province. Visitors are immediately made to feel at home and part of the community – like a member of the family. No matter what part of Saskatchewan you visit, no matter how long you decide to stay, the essence of this place makes a memorable impression.

The **planning discussions** on the province's distinctive attributes reaffirmed the pillars as the foundation and starting point for looking at product and visitor experience development. The comments to the right fit readily under the pillars and provide an overview of what needs to be elevated in a 10-year Strategy

- Land and sky
 - *Size of the sky is awe-inspiring*
 - *Sense of freedom*
 - *Living skies – the sunrise, the sunset, one of the largest Dark Skies Reserves in the world*
 - *Diversity of terrain and ecosystems*
 - *Four full seasons*
 - *The element of surprise*
- Time and space
 - *Life slows down – time is in no hurry*
 - *Room to breathe within endless uncrowded space*
 - *Impressive geology that speaks to the passing of time – the first discovery of dinosaurs in North America is a tangible connection to this endless past*
 - *Impact of space and time on community life and travel*
- Community
 - *Warmth of the people*
 - *Indigenous culture – the core of the province*
 - *Beginning of the West and emerging ethnic diversity from waves of settlers*
 - *Small town spirit – entrepreneurial and resilient / plains culture*
 - *Talent and innovation*
 - *Arts and sports*
 - *Festivals*

Strengths

In 2012 Tourism Saskatchewan was established as a Crown Corporation tasked with developing a vibrant tourism industry offering year-round compelling and memorable Saskatchewan experiences. Significant progress has been made in identifying the strengths and taking initial steps to leverage the potential opportunities.



The strengths of Saskatchewan as a destination:

- **The diversity of landscapes and the strong aesthetic appeal of its beauty** from the prairies of the south to the boreal forests of the north. This appeal remains untapped in many areas.
- Near-in market recognition of assets that provide an ideal setting for **outdoor recreation** and relaxation in the outdoors. The province has justifiable pride in offering **some of the best freshwater fishing in North America and exceptional opportunities for hunting** – serviced by 103 fishing outfitters and 98 hunting outfitters. These assets attract the fishing and hunting market from the US and from many parts of Canada.
- **The consumer branding** developed by Tourism Saskatchewan has captured the essence of the province and clearly resonates with industry and communities. The brand pillars, **‘land and sky’, ‘time and space’, and ‘community’** reflect the personality and attributes of Saskatchewan and help differentiate it from the rest of Canada – including the awe-inspiring panoramic viewscapes of land and sky, the sense that there is room to breathe and time to slow down, and the strong spirit of hospitality and welcome that is found throughout the province.
- **The wealth of stories** that can be found within every community. Stories that relate to the Indigenous people and their traditional and contemporary culture; the ethnic tapestry of lifestyles arising from waves of settlement through to today; the RCMP heritage; the accomplishments and global leadership in agricultural and industrial innovation, science and technology; the resilience of the entrepreneurial spirit through time; and the role of sport and arts in generating community pride.
- The natural and nature-based assets associated with Saskatchewan’s **national, provincial, and regional parks, and the trails systems** that have been developed for summer and winter outdoor activities.
- The **cultural assets – galleries and museums** – that highlight the significance of Saskatchewan as a destination for arts and culture, including the recently developed iconic Rемаi Modern.
- The emerging presence in **culinary tourism** and the growing vibe of **Saskatoon** as a destination within the province.
- The increasing commitment from the Indigenous communities to create new product and experiences, particularly in relation to the work associated with the **Wanuskewin Heritage Park Authority’s** application to become Saskatchewan’s first UNESCO World Heritage designated site.

Challenges to growth

The core strength of Saskatchewan – its physical setting, ironically is its core challenge, in terms of distance from markets, internal issues of access, and a terrain that is often misconstrued in the minds of the consumers who are unfamiliar with the province.

The challenges are varied and relate to all aspects of the destination and the industry.

- **Strong reliance on day visitation and visitation from within Saskatchewan.** A significant proportion of this visitation (26%) is from a segment known as 'Lakes and Locals' that have lower economic value, a high propensity for day trips and visiting friends and relatives, and are somewhat reluctant to try new activities. While this remains an important segment to many businesses, it is constraining growth on occupancy rates and overall accommodation revenues.
- **High level of seasonality** combined with a focus on traditional summer outdoor activities have resulted in a very short window of opportunity for businesses.
- **The location of Saskatchewan** adjacent to the sparsely populated US northern plain states and the absence of highway routes to the Arctic (something BC, Alberta and Manitoba all possess). This in turn reduces the volume and diversity of traffic and markets.
- **Declining air connectivity** and trans-border air traffic similarly reflects the geographic location of the province.
- **Rural-urban divide** – Regina and Saskatoon account for 50% of all visitor spending and lead the way in more sophisticated product and infrastructure. Outside of these two centres, hospitality services, attractions and supporting infrastructure are widely dispersed given the relative absence of mid-tier cities.

- **Under-investment in product**, particularly outside of the urban centres. The factors underlying this issue are varied:
 - The downturn in the resource economy and the associated decline in many industry metrics have placed a disincentive to invest in new operations and facilities;
 - The challenges managing seasonal cash flows;
 - Limited access to capital, especially in a risk adverse fiscal environment;
 - The perception by many in the accommodation and food service industries that they are less about leisure travel and more about business travel, and therefore not in need of providing a “visitor experience”;
 - The lack of market and export-readiness.The combination of these issues are particularly evident in **the prevalence of aging facilities and infrastructure in the North** often associated with the hunting and fishing experience, and the lack of adequate public infrastructure servicing many highway locations, including the **quality of road** and the nature of **signage** in certain areas.

Challenges to growth

When we're perceived outside the province we're seen as tired, conservative and boring, but we see ourselves as hidden gems. That's why we have a Saskatchewan pride movement going; our tech sector for example, punches well above our weight, other sectors often surprise our "adversaries"; and we often surprise our visitors as to how good the experience is.

Workshop Participant

- **Difficulties in sourcing and retaining an adequate supply of labour**, in part because of lower than average wage levels, and prevalence of semi-skilled and part-time positions. These systemic labour shortages compromise profitability and are making it that much harder to retain and deliver positive visitor experiences. Any resurgence of the resource economy will exacerbate this labour challenge.
- **The enabling context** – the whole-of-government strategic focus to building the competitiveness of Saskatchewan as a visitor destination has been rather limited. Tourism is not that well understood as an economic sector and there is insufficient awareness of the opportunities it offers for growth and diversification.
- The **consumer brand** resonates well with visitor markets, but its ethereal qualities have yet to be incorporated and interpreted at the individual product level.
- **Absence of a strategic and creative framework for product development.** Efforts have focused on developing new experiences, but the return on investment is low and the experiences generally do not stand out as sufficiently compelling for out-of-province markets.
- **Established Canadian and international destinations will outspend the Province** on new product development attracting higher value segments such as Affluent Families.

These **factors are conspiring together to suppress the economic benefits** that should flow from tourism. This is clearly evident in the expenditure patterns. The average trip spend in 2016 of \$141 for all visitors and \$210 for overnight visitors falls well behind Ontario (\$186 and \$364 respectively), BC (\$246, \$486) and Alberta (\$243, \$441).

Looking to the next ten years, addressing these challenges to growth and leveraging key strengths are of critical importance to building a competitive destination and a buoyant industry.

Where is the growth opportunity?

Holistic thinking will be needed to broaden the market appeal and generate growth in visitor revenue. The province has a strong tourism asset base, but building for the future will require a focus on creating new and compelling experiences in tandem with strengthening other aspects of the value chain.

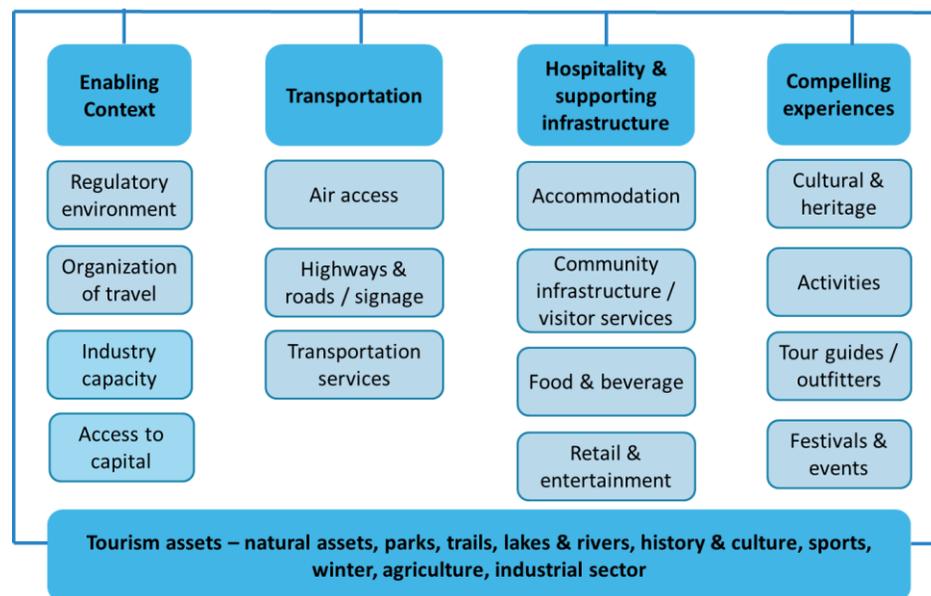
If Saskatchewan is to grow tourism visitation and expenditures, it will have to develop a much broader market appeal by making better use of its core strengths and strategic assets. The heavy dependence on the domestic market means the out-of-country market share of 5% is the lowest in the country. Almost three quarters of all overnight visitors coming from within the province, the hotel occupancy and room rates are among the lowest in Canada, and the movement of transborder air passengers has stalled in recent years. While this performance is attributable, in part, to the pullback in resource industry activity beginning in 2014, it is also a reflection of an over-reliance on the core Prairie visitor markets.

The real strengths of Saskatchewan lie in its outdoor product and in the interest in camping, fishing, boating, beach and park activities. However, few of these activities, outside of fishing and hunting, represent a competitive advantage for the province. Even though provincial park

attendance has been trending upward over the last decade, national park and historic site attendance in the province has lagged behind national averages. So although existing markets place a high priority on park experiences, this is not necessarily translating into greater attendance¹. This appears to highlight that Saskatchewan's natural attributes, however exceptional, are not in themselves sufficient to draw in new visitors. Rather, market trends would suggest that it is the opportunity to engage, experience and learn about the landscape, its geological and bio-physical features and the relationship with human activity

that is what will be needed to drive interest and demand in the future.

Looking at the longer-term, building compelling experiences is critical to generating growth, particularly if Saskatchewan is to attract higher-yield and longer-haul markets. Equally, this will need to be accompanied by a focus on all the associated elements of the **value chain** if visitors are to experience innovative and unique product offerings across the province. This will require looking at the enabling context, transportation, supporting infrastructure, and the overall readiness and capacity of industry.



The Tourism Value Chain

¹ The lone exception to this trend is the growing popularity of Grasslands National Park which has benefited from targeted advertising by Tourism Saskatchewan and active in-park programming by Parks Canada.

3. 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 will involve a new way of thinking, new ways of doing business, and a new approach to collaboration. It will involve encouraging everyone to embrace the vision and to work together to make a difference that can bring pride and a sense of achievement to all of us.

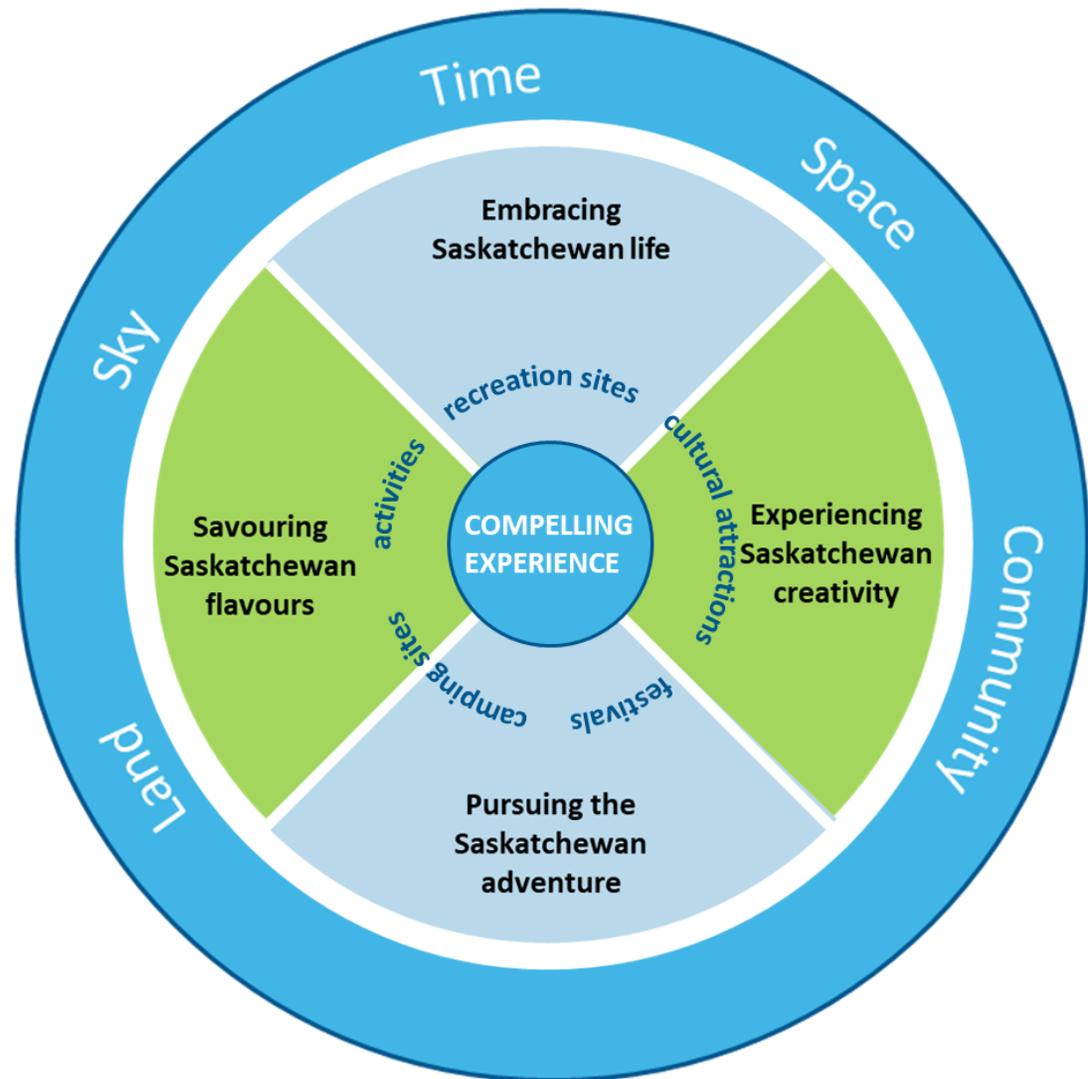
Tourism Saskatchewan is committed to leading the way and to acting as the custodian of the Strategy.



Developing an experiential focus

Today's visitors are looking to connect emotionally with a destination and its people. They are seeking experiences that will engage the senses, offer adventure, reveal the story and create lasting memories that they can talk about.

The brand pillars exemplify the essence of Saskatchewan and provide the context for the narrative. They lend themselves to supporting four experiential themes that together embody all the richness and diversity of landscape and culture that Saskatchewan has to offer. Themes, that when combined with the activities and tourism assets that the province already promotes, have the potential of strengthening the positioning and appeal of Saskatchewan for its target markets.



The experience elements



Embracing Saskatchewan life in our northern forests and on our prairie farms, ranches and homesteads; in our small towns and cities; by our lakes and rivers, and in our sports stadiums. A 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. A welcoming community woven together and impacting far afield through our farming, our innovation, our technologies, and a life that embodies the story of the west.

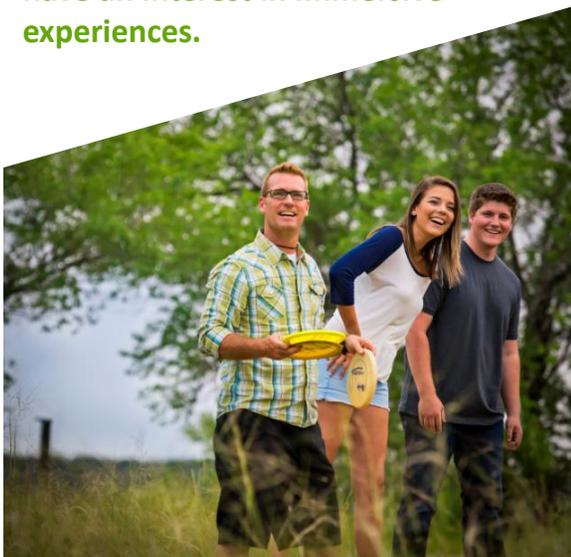
Pursuing the Saskatchewan adventure in a land that offers endless opportunity to enjoy the outdoors under the vast canopy of skies year round. The diversity of terrain and ecosystems, our range of parks and trails, and our wildlife provide a setting that promises both challenge and relaxation, solitude and a way of connecting with each other, while gaining a fresh perspective on how time and space have influenced life and landscapes all around us.

Savouring Saskatchewan flavours in our fusion of foods and drinks that reflect the diversity of our cultures and traditions, and our prairie bounty. Whether it is in small and eclectic urban neighbourhood restaurants or fine dining rooms, or whether it is enjoying freshly foraged Indigenous foods, suppers on the farm or tastings at our craft breweries – the experience and the story of our food and drink will add a distinctive and memorable element to time spent in Saskatchewan.

Experiencing Saskatchewan creativity in our urban areas and quintessential small towns. Creativity that has been inspired by our land and sky, time and space, and our community life. This is a land of artists and a province that celebrates the arts – from our modern galleries and digital technologies to our small-town boutiques and studios, and from our music and literary festivals to theatre and dance – the essence of Saskatchewan can be found in every element of its creativity.

The target markets

Considerable work has been undertaken by Tourism Saskatchewan in partnership with Environics Analytics to create a segmentation model for the province's domestic visitors and to analyse the profile of the US hunting and fishing market. These segments have been carefully appraised in terms of their growth potential and their market characteristics, and the insights gained will play a role in shaping recommendations for product and experience development. All segments have an interest in immersive experiences.



Three primary domestic markets are key to growth and have specific product needs:

- **Short-Haul Suburbanites** – represent 8.4% of the domestic market footprint, significantly over-indexes on preference for Saskatchewan and is a mid-scale segment in terms of economic value. The segment is well aligned to the province's core product offering of camping and fishing/hunting, and could be attracted in the winter for snowmobiling.
- **Minivans and Memories** – a midscale market with a smaller market footprint at 6.3%. The segment performs well in the preference index for Saskatchewan, but is attracted more to other outdoor Canadian destinations such as Alberta and BC. With strategic product development this market could be attracted in greater numbers for active holidays based around camping/RV trips and outdoor sports.
- **Affluent Families** – offers the greatest potential in terms of value and represents 11.9% of the market footprint. However, it is a highly competitive segment and currently under-indexes on preference for Saskatchewan. Affluent Families are more likely to visit Ontario, Quebec and PEI. The potential to attract this segment will lie in developing a new focus on upscale accommodations and resorts linked to easily accessible outdoor experiences and innovative quality products.

In the US there are two key segments with a high level of interest in hunting and fishing – again with specific product development needs:

- **Upscale Families** are status conscious and keen to show off their affluence through consumption.
- **Golden Years** show a preference for high quality / luxury holidays. In terms of product development this points to a need to focus on the quality of the wilderness experience and to offering high quality accommodation and facilities.

The overseas market in Saskatchewan remains small but has excellent potential for growth, particularly from **UK, Germany and China**. Destination Canada's ten core overseas markets are growing at twice the rate of its non-core markets but so far, Saskatchewan has not experienced this type of growth. Of note is the fact that the Asia-Pacific market has now overtaken Europe as Canada's largest overseas market. Attracting these markets requires strategic positioning not just for the consumer but for the travel trade as well, given that they play a critical role as product-market intermediaries.

In addition to targeting these markets for growth in overnight revenue, Saskatchewan will continue to attract **Lakes and Locals** – a domestic segment that will remain key to the viability of many businesses. As experiences are developed, the potential to generate additional revenue from this segment will increase, but likely not at the same level as other segments.

The planning framework

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.

This is an approach that highlights the need for new thinking and a willingness to be bold – to embrace ideas ‘outside of the box’ that will strategically elevate our strengths in an exciting and dynamic way.

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. The visitor is looking for the ‘wow’ factor – the compelling reasons to come year-round. An integrated approach based on these five priority areas of action will create an animated destination that will arouse new interest and will inspire new levels of visitation.



4. Driving Growth – The Core Priorities

Empowering partners

WHAT 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.

Growth will not occur without a cohesive partnership-based approach to the pursuit of a shared vision. **To be a strong and dynamic wealth creating sector, there needs to be an enhanced commitment to developing and empowering partners at all levels across the province.**

Government

The provincial government has a fundamental role to play in the delivery of this Strategy. There is significant long-term growth potential, but for that potential to be realised new measures will need to be put in place. Tourism is a notoriously cross-cutting sector that influences, and is influenced by many different policy areas. Robust coordination and delivery measures across government will be required to optimize the future potential. Through this approach, the tourism economy will not only benefit in its own right, but it will become a catalyst to advance other policy areas, including delivering growth to Indigenous communities, rural and northern development, and creating jobs.

However, optimizing potential and generating an impact on local economies requires fully understanding the opportunity and the way in which the various elements of government policy inter-relate to impact tourism growth and the competitiveness of the destination. This in turn requires an in-depth appreciation of the value of tourism to the Saskatchewan economy and its potential to enhance the cultural identity of the province.

The spectrum of provincial policies and programs that have the capacity to influence the tourism sector is significant. These range from air access and transportation policies, including highway infrastructure through to land-use policies, taxation and business regulations, and supporting policies relating to accessing capital and human resources. All of these elements need to be considered in relation to each other – emphasizing the importance of a holistic partnership-based approach facilitated by Tourism Saskatchewan. One that is structured in a way that ensures ongoing dialogue and assessment of policy opportunities relating to tourism development and the competitiveness of the province as a destination.

Similarly, at the local level of government, particularly in destination areas that are firmly committed to growing and developing tourism, there is a need to reflect this cross-cutting dialogue. Here again it is important to identify alignment and where supporting policies can be leveraged – such as those relating to parks and trails, arts, culture and heritage, and land use planning.

Collaboration and alignment of this nature will require a significant shift in perspective from current practices. It is a shift to one that fully recognizes and coordinates the interplay of the multiple roles and shared interests within government that are vital for the future prosperity and sustainability of the tourism economy.

Empowering partners

Indigenous community

A critical cornerstone to building and differentiating the Saskatchewan destination experience in the coming ten years is the Indigenous community. So much of the wider story revolves around their relations with the land through time and space. Encountering the true essence of Saskatchewan involves experiencing how the province's contemporary culture and elements of its economy, particularly in rural and northern areas reflect our dynamic Indigenous communities.

This strategy, with its focus on empowering partners, will seek to build on the new momentum that is growing within the Indigenous tourism sector. In 2018 the Indigenous Tourism Association of Canada (ITAC) formed a partnership with Western Economic Diversification Canada (WD) and Tourism Saskatchewan to assist with growing the Indigenous tourism industry in Saskatchewan and leveraging success of emerging Indigenous destination areas, such as the South Saskatchewan River Indigenous Tourism Corridor near Saskatoon and the Meadow Lake area. Federal investment into product development within these areas reinforces the importance of ensuring that there is a strong collaborative partnership with Indigenous leaders and communities to continue exploring ways of developing opportunities within this sector and strengthening other sectors through increased integration of experiences

Industry

Stimulating growth and development of tourism must also be driven by industry itself. With over 3,200 organizations offering over 4,200 attractions, events and tourism-related businesses, the enthusiasm and drive for progress is equally a shared responsibility of the various tourism stakeholders – individual businesses, sector associations, and supporting agencies. Ultimately everyone has a role to play in the success of tourism and in achieving the vision.

In addition to the need to work together to strengthen the destination through creating synergies in policy making and program development, it is also critical to recognize that there has been a fundamental shift in how industry is expected to do business. The future is increasingly about collaboration – it is about bringing together businesses to improve overall capacity to offer more connected, seamless experiences. It is about understanding the convergence that has taken place within the tourism ecosystem and the need for co-creation of value in meeting the needs and expectations of today's travellers.

To be successful, industry stakeholders will need to feel empowered and encouraged to think differently and to pursue new models of working together. Building trust and mutual respect is fundamental to the process, together with a firm focus on the customer and what they are looking for in a visit to Saskatchewan

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.**

The business case for tourism needs to be strengthened and its capacity to achieve multiple cross-sector objectives needs to be fully understood, particularly across government. This will assist in building a rationale for allocation of resources, investment attraction, and risk mitigation, and will demonstrate return on investment. While availability, quality and consistency of data can present challenges, it is already possible to bring together a range of existing data sources to develop provincial and regional profiles to significantly augment the current reporting of high-level 'tourism facts'.

- Define the scope of an impact assessment model.
- Collate existing provincial and regional data inputs on visitation, economic performance, markets of origin, air passenger volumes, employment and related indicators.

Empowering Partners

- Establish relevant new performance measurement tools that will inform an economic impact assessment, including non-financial criteria relating to sustainability and cultural values. Consider the UNWTO's Indicators of Sustainable Development for Tourism Destinations or the Sustainable Development Goals of the United Nations in assessing the broader range of sustainability issues.
- Develop the impact assessment model that will measure direct and indirect impacts of tourism; and, in addition to the Annual Report, prepare an annual publication on the current value and impact of tourism in Saskatchewan, including regional indicators and forecasts. The publication should highlight opportunities to use tourism to stimulate regional economic development, and its contribution to wider government policy priorities.

2. Highlight the government's commitment to tourism through working cross-government to amend the Province's high-level vision statement to include tourism.

A reworded vision statement could potentially read: *The best place in Canada – to live, to work, to visit, to start a business, to get an education, to raise a family and build a life.* The insertion of the phrase 'to visit' would assist in repositioning tourism from a political perspective, and would provide recognition for its contribution to the Province's key underlying goals outlined in the *Saskatchewan Plan for Growth*

3. Enhance opportunities for ongoing cross-ministry and government agency dialogue on tourism development.

This will facilitate a greater coordination of knowledge transfer and will ensure that different agencies can assess opportunities to impact and leverage tourism in their own policies and programs. In turn, this will create a stronger degree of alignment and a more integrated approach to the development of Saskatchewan as a competitive destination.

The dialogue should focus on strengthening the existing working relationships between Tourism Saskatchewan and two particular ministries where there are strong areas of common interest – namely the Ministry of Parks, Culture and Sport and the Ministry of Trade and Export Development – through regular meetings to discuss common agendas. On a periodic basis, discussions should be widened to be inclusive of all ministries with a shared interest – particularly the Ministries of Highway and Infrastructure, Environment, and Agriculture, together with relevant provincial agencies in arts, heritage and culture.

- Map all ministries, crown corporations and provincial agencies in relation to specific government/provincial alignment opportunities with tourism development; areas of mutual interest that can be strengthened and advanced through ongoing cross-government policy engagement and/or direct discussions with

Tourism Saskatchewan; and areas where ministries and agencies can take a direct role in the implementation of this Strategy.

- Develop consensus on common priorities, activities and annual targets and establish relevant strategic agreements to work on these areas of shared interest. These agreements should consider longer-term strategic alignment of key policy areas; potential for the development of joint programs; annual tactical activities; and appropriate indicators of progress.
- Include regular reporting on the implementation of this Strategy within the discussions and an ongoing assessment of related issues and opportunities.
- Use the Strategy to identify key areas of planning and policy consideration on an annual basis, such as international air access, road infrastructure projects, transformational projects, foreign investment attraction, human resources, and funding of product development.

Empowering partners

4. Strengthen linkages with industry, including opportunities for dialogue, communications and networking initiatives.

An ongoing strategic emphasis on facilitating dialogue, collaboration and networking is essential to build a strong industry committed to playing a decisive developmental role in destination and product development. This will improve planning processes and will contribute to a greater level of uptake and follow through on development efforts than has traditionally been the case. Ongoing dialogue through strategic linkages provides an opportunity to continually assess implementation and identify programs that have the potential to accelerate growth, while elevating the profile of tourism as a key economic sector.

- Continue to utilize the Tourism Saskatchewan Board of Directors to engage in dialogue and provide advice on the implementation of this Strategy and areas of policy development.
- Provide capacity for setting up temporary working groups that can be tasked to look at select issues and opportunities, such as labour needs, provincial trails, infrastructural needs, or policies for generating growth within destination areas. It is anticipated that these working groups will play an important role in advising on pilot initiatives and transformational projects.

- Establish a regular schedule of meetings with tourism sectoral associations to review strategic priorities and assess optimal ways of taking initiatives forward and strengthening partnerships.
- Work collaboratively with the networks of community marketing organizations (CMOs) and destination marketing organizations (DMOs) to advance relevant priorities.
- Expand the Tourism Talks initiative which was launched in 2018. These are designed to foster industry relationships and partnerships; support growth through education and collaboration; and increase awareness of Saskatchewan tourism products and experiences.
- Investigate the feasibility of re-establishing Regional Boards, which were formerly funded by the Province. Consider assessing the benefits through selecting a pilot area for testing and proving a structure that is affordable, sustainable and capable of participating in partnership initiatives.

5. Support initiatives to strengthen Indigenous leadership within the tourism industry.

The growing involvement of Indigenous communities in the development of mainstream and Indigenous cultural tourism products and experiences has been strengthened through the exemplary tourism development work of certain First Nations, particularly the Whitecap Dakota First Nation, and the recent involvement of the Indigenous Tourism Association of Canada and Tourism Saskatchewan in supporting this sector. This supporting work has focused on facilitating engagement sessions aimed at developing strategic direction.

- Work with the Indigenous Tourism Association of Canada to maintain the Regional Coordinator position, and continue to support processes of engagement and dialogue that will highlight the economic benefits of Indigenous tourism and opportunities for development.
- Support Indigenous initiatives designed to formally or informally encourage networking and dialogue within the sector, including potentially establishing a provincial Indigenous tourism organization.

No matter how brilliant your mind or strategy, if you are playing a solo game, you'll always lose out to a team.

Reid Hoffman, co-founder of LinkedIn

Focusing on transformational projects

WHAT 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.

The nature of transformational projects

Large iconic projects are considered to be an important element of this product development Strategy. Transformational projects can include stand-alone visitor attractions, new accommodation concepts, or a major repositioning and redevelopment of existing assets to create a new type of demand.

The strategic use of major transformational projects can be seen within many destinations, including elsewhere in Canada. In Newfoundland, the development of the luxurious Fogo Island Inn was all about creating cultural and economic resilience of the island. The integration of very bold thinking, innovation, and passion from private entrepreneurial/philanthropic interests, together with support from the public sector have reinvigorated the local economy and created a new iconic landmark in Canada that offers *magic and enchantment in a stark and unforgiving wilderness*.

The rationale of these transformational projects is simple – the regeneration of urban and rural economies, a strengthening of local heritage, and a growth in the tourism economy. They are all based on bold thinking and they all represent significant capital investment into a development model that has proved to have a significant impact in transforming local communities.

Titanic Belfast – a case-study

The Titanic Belfast was conceived as a Signature Project to kick-start a new phase of tourism and change the visitor perception of Belfast as Northern Ireland continued to seek ways of regaining ground within the industry in the aftermath of The Troubles. £76m was invested into the project with the attraction becoming part of a larger regeneration project designed to create a maritime destination. In the first three years of operation following its opening in spring 2012, there were approximately 1.9 million admissions to the interpretive galleries, 150,000 conference delegates, and 100,000 visitors to special exhibitions such as Game of Thrones. Seventy-one per-cent of these visitors were out-of-state, with 22% from beyond the shores of Ireland and Britain. Titanic Belfast, with its global positioning, has proved to be an economic driver, providing jobs and prosperity. It has generated £105 million in additional tourism spend, and is sustaining around 893 jobs each year in the wider economy. In addition, it has played a major role in unlocking over £50 million of public and private investment in related maritime heritage assets.

Today, the focus is on continuing to develop the immediate area as a destination. A series of themed projects within the Titanic Quarter are being assessed as the basis of further strengthening the waterfront as a truly international and iconic experience – one that is ‘globally significant’, ‘regionally vital’ and ‘locally embraced’.

Focusing on transformational projects

Transformational projects generally require long-term political buy-in and financial support from both provincial and national governments as well as the support of a wide range of other interests, not least the communities in which they are placed. Typically, transformational projects take at least 10 years from concept through to delivery and are often championed by high profile individuals from both politics and business.

This Strategy sees transformational projects as potentially important to the long-term success of tourism in Saskatchewan given the challenges that have already been noted and the desirability of providing catalysts that can boost the awareness of the province and rapidly grow the tourism industry.

In the initial phase of implementation of the Strategy, the outline concepts that are introduced in the following pages can be developed into firmer detailed propositions that could then be assessed via a range of standard criteria, together with an estimate of economic impact.

Given the scale of transformational projects it is likely that only one major concept would be taken forward, although the review process should stimulate shorter-term initiatives that are less capital intensive.

A number of these ideas are not solely dependent on leisure visitors for their success. Rather, they also see business tourism as a driver that can be used to capitalize on a wider set of economic development goals that include innovation, export growth and job creation.

Saskatoon River Landing & Rемаi Modern

The concept of transformational projects is already clearly in evidence within Saskatchewan. The development of a new downtown hub along the South Saskatchewan River in Saskatoon was first promoted in 1978. Today the regeneration of the riverside public space, the opening of the Rемаi Modern (a \$85 million art gallery and home to the world's most comprehensive collection of Picasso linocuts), and the proposed \$300 million in office towers, a condominium project and a 12-storey hotel development will all have a significant impact on the city's skyline and economic well-being.

In the first year of its operation, the Rемаi Modern's total economic impact on GDP was \$21.3 million. Opening in October 2017, the attraction led either directly or indirectly to the creation of almost 200 full-time equivalent jobs in tourism alone. Analysis of year one shows that the facility contributed \$11.8 million in GDP within the tourism sector.

Clearly as a signature attraction for the city and the province, the art gallery is already demonstrating the value of a major transformational project that is collectively re-shaping the Saskatoon offering – its urban vibe and the culinary scene. As it positions itself as one of North America's most important art museums, Rемаi Modern is regarded as an excellent example of partnership between arts, entrepreneurship and business sectors.

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.

The concepts on the following pages have generated a preliminary level of interest with stakeholders and should be given further consideration.

- Undertake a preliminary feasibility analysis – estimate potential economic impact and assess how a select project will regenerate a destination area. Projects in destination areas will strengthen overall critical mass and may have a greater capacity to generate growth.
- Prepare a comprehensive development plan and a business plan for any selected project. This plan should include strategic directions for leveraging the transformational project within the wider destination area and for ensuring a strong degree of regional regeneration, particularly in rural areas.



Source: <https://remaimodern.org>

Transformational Concept – Dark Skies Observatory Resort

The concept

The interest in experiencing Dark Skies is growing. A variety of dark skies ‘preserves’, reserves and parks have developed in recent years under the auspices of the International Dark-Sky Association. Canada leads in this field with 18 preserves. Given the skies in Saskatchewan it is not surprising that the province has two designated areas – Cypress Hills Interprovincial Park (2004) and Grasslands National Park (2009). While Cypress Hills opened an observatory in 2011, the leisure market experience in many Dark Skies Preserves is generally under-developed and rarely presented as an integrated product offering. Mont Mégantic Observatory is a leader in Canada but its role is serious astronomy.

This presents Saskatchewan with an opportunity to develop an iconic leisure-focused tourism product that is built around a new destination hub – one that can complement the night-time experience with day time eco-tourism activities, spa and wellness, and high-end resort accommodation. A destination concept of this nature will:

- Leverage Canada’s existing lead in epic Dark Sky Preserves;
- Address a shortfall in rural-based resort destinations;
- Bring added value to other existing national/provincial designations and related experiences – that is assuming the concept is developed in either Grasslands National Park or Cypress Hills.

Visitor markets:

- Leisure tourists – it will be of interest to the target segments, particularly the Affluent Families
- Niche sectors with a specific interest in astronomy and astro-tourism – leisure visitors, and potentially academic markets, subject to technical standard of observatory, although such markets would likely seek mid-range accommodation options.
- MICE markets – subject to location and facilities

Comparables

There are very few clear comparables of a resort with a strong astro-tourism focus, although the online presence of dark skies activities is growing with guided activities and star gazing events.

- One that stands out is **&Beyond Sossusvlei Desert Lodge** located in the Namiband Nature Reserve within the Namib Desert. There is very little development in the Reserve and dark skies are guaranteed. The lodge offers sheer silence, total tranquillity and romantic luxury. From stargazing to intimate picnics in the desert, this is an extraordinary desert wilderness. With stargazing from a sophisticated observatory under the guidance of a resident astronomer, guided after-dinner walks under the constellations, bedrooms with skylights and a range of ecoadventure during the day – this is highlighted as one of the top stargazing retreats in the world.
- **Pure Pods, New Zealand** – offers a unique ‘outside the box’ glamping experience in six locations within New Zealand. These total surround glass pods (roof and floor) are designed to give an intensely personal immersive experience into Pure New Zealand – one that allows the visitor to *experience nature’s show vividly*. They are not associated with dark sky preserves per se, but they offer visitors the opportunity to sleep with the Southern Cross and millions of stars above.



Source: www.andbeyond.com



Source: www.purepods.com

Transformational Concept – Global Geopark Designation

The concept

UNESCO recognition for the internationally significant geology and palaeontology of Grasslands National Park and Cypress Hills Interprovincial Park through Global Geopark designation.

The East block of the National Park is one of a small number of places around the world that reveals the Cretaceous-Tertiary Boundary – a thin, white, chalky layer in the soil, separating the age of dinosaurs from mammals and is one of the richest resources for dinosaur fossils in Canada, and the site of a recently discovered new species of prehistoric birds called the *Brodavis Americanus*. Cypress Hills adds further unique value as a striking anomaly on the flat plains which does not owe its existence to faulting, folding or any form of uplift. Rather, it was formed by millions of years of sedimentary deposition which began when the area was covered by the warm shallow Bearpaw Sea 70 million years ago, and an equally long period of erosion, accentuated by the action of the southward flowing glaciers of the Ice Age that never completely engulfed the higher elevations. Today these hills form an erosional plateau which exposes a unique cross-section of geological history found nowhere else in western Canada.

Global Geopark status would raise the significance of the “land”, “time” and “space” elements of the brand and would complement the Dark Skies theme, while also adding value to the existing park designations and the work of the T.rex Discovery Centre. Furthermore, there is potential to link with other palaeontological sites in western Canada, including the recently designated Tumble Ridge Global Geopark in BC, to create a pan western attraction.

Visitor markets:

- Leisure tourists – the European and Chinese markets in particular have a high level of awareness and interest in this designation
- Education market – schools and higher education
- Local community / visiting friends and family market (VFR)

Comparable

- **Tumbler Ridge Global Geopark, BC** – in 2014 this area in northern BC was officially designated as the second UNESCO Global Geopark in North America in recognition of its Cretaceous dinosaur tracks and palaeontological resources. The Geopark has now become core to the community’s tourism offering, with its geosites not only highlighting opportunities to explore its rich geological heritage, but also promoting its wealth of year-round ecotourism activities, areas of scenic beauty and cultural heritage. The process of pursuing designation galvanised the community around a clear goal that has continued to motivate stakeholders to leverage the opportunity for further growth.



Source: <https://www.tumblerridgegeopark.ca>

The Geopark concept is based on a three-pronged approach that combines conservation, education and geotourism. With a strong underlying focus on sustainable development, a Geopark has the potential to become a significant catalyst for economic development through attracting new markets and longer-stay visitors to a destination.

The designation offers an enhanced ability to leverage the global growth in geotourism and the international prestige associated with the UNESCO designation. It would also create new opportunities to attract public and private investment for supporting infrastructure.

Designation would have the additional benefit of complementing the work of Wanuskewin Heritage Park. The Park is now on the UNESCO Tentative List of World Heritage Sites. With its archaeological sites that tell an Indigenous story of cultural development spanning six millennia, two areas of recognized global significance would provide anchor attractions for new international markets, with each providing a unique and different perspective on Saskatchewan through time and space.

Transformational Concept – Protein Museum

The concept

An experiential museum aligned to the development of the federal government's protein industries super-cluster in Saskatchewan. This new experience has the potential to showcase the province's world class agriculture, highlight how Saskatchewan has been shaped by the food and farming industries, and focus on new innovations now at the forefront of farming practice today in Saskatchewan. A facility of this nature will complement the Canada Agriculture and Food Museum in Ottawa, but will differ in its capacity to target more specialist audiences, with the significant added advantage of being in-location.

The super-cluster is one of five in Canada and involves more than 120 corporate, industry and post-secondary partners from the Prairies, with total cash, in-kind commitments and venture capital investment from partners of \$400 million. Working with one of the principal program partners, such as the University of Saskatchewan, the development would present the theme of innovation using state-of-the-art technology to bring the story and its futuristic elements to life in a vibrant manner. It should provide virtual opportunities and dynamic simulations to engage hands-on in the scientific and operational elements of farming, and in exploring the province's contribution to the world.

Given the potential wide range of visitor markets, the development should include high quality business conference and accommodation facilities. A focus on its wider role in business tourism will reduce the risk of developing a stand-alone business attraction.

Visitor markets:

- Food and farming specialist study groups – these will be national and international and will have a range of academic and scientific interests
- Broader based business visitors – MICE market
- Education market – schools and higher education
- Leisure tourists
- Local community / visiting friends and family market (VFR)

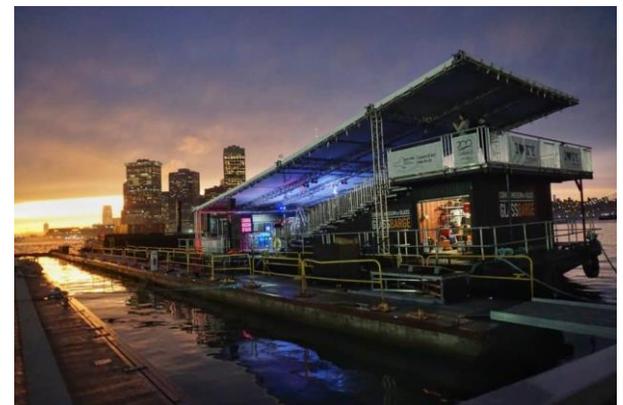
Comparable

- **Corning Museum of Glass** – the world's most comprehensive collection of glass includes an Innovation Centre based around state-of-the-art, interactive science and technology exhibits. The Centre provides an opportunity to meet inventors whose ideas changed the world and to engage with glass chemistry or explore the power of optical fibre in the future. The Scientific Research Department at the Museum is an international resource for scientific and technical knowledge of glass, its composition and structure, and its uses throughout history, in the modern world, and into the future. The department conducts original research on glass science and technology, to advance the art and craft of glassmaking, and to disseminate that learning to makers worldwide. The Museum continues its support of the examination of historical glass artifacts and the study of the history of glassmaking by collaborating with archaeologists and scientists from all over the world. The Museum offers hands-on classes in addition to its series of galleries.

The Museum is working on turning a 30 by 80 foot flat deck barge into a floating venue for glass-blowing demonstrations and a unique new setting to tell the story of 150 years of glass innovation in Corning.



Source: <https://www.cmog.org/photo/innovation-center-optics-gallery>



Source: <https://www.mgmclaren.com/news/press-releases/mclaren-engineering-group-completes-design-of-the-corning-museum-of-glass-touring-glassbarge/>

Transformational Concept – Iconic Multi-Day Winter Snowmobile Tour

The concept

An iconic long-distance snowmobile trail in southern and mid Saskatchewan that builds on existing trails and hub networks, to be developed as a recognized international experience. The concept needs to be based on a multi-day snowmobile tour that would link to other winter activities and local communities, and would include the option of higher-end accommodation to attract new markets.

There are numerous areas already known for snowmobiling such as La Ronge, Nipawin, North Battleford, Duck Lake, Moose Mountain and Greenwater Lake. However current demand tends to be regional and focused on local trail systems, and availability of full outfitting services and higher-end accommodation is limited. As such, it is not on the radar of longer-distance markets.

Moving forward with the concept will require looking at issues of connectivity between trail systems, improving the experience through the development of complementary winter activities and related infrastructure, and addressing the need for increased accommodation options.

In more northern areas, there is the potential to involve Indigenous communities in developing an experience that has a strong Indigenous theme based on their traditional knowledge and use of the land in winter.

Opportunities exist to work with the ministry of Parks, Culture and Sports in the development of support facilities in parks through their business development framework.

Visitor markets:

- Leisure and outdoor adventure markets
- Short-haul Suburbanites
- Affluent Families
- Long-haul prospects

Considerations:

Trail-based tourism is a growing world-wide phenomenon and would be well suited for Saskatchewan as it allows visitors to move around the landscape in ways that are more exploratory and engaging than road and highway corridors – and, it brings the brand to life in a dynamic way.

However, the more northern areas will have to address transportation issues as conditions on many northern highways are less favourable. Other concerns to be addressed will include the management of Woodland Caribou as an endangered species and the need to acquire a Crown land lease for any physical developments.

Comparables

The St. Lawrence Tour, Quebec – 5 days over 680 kms. This is a self-guided itinerary with accommodation recommendations, eating places and activities suggested for each day. The full trip involves a ferry ride through the ice floes.

Algonquin Park Snowmobile Safari, Ontario – 850 km circular expedition exploring the park on an extensive network of trails and logging roads. Includes motel accommodation, partial board, winter clothing, snowmobile and services of a guide.

Snowmobiling in Lapland – a series of themed packaged and partially guided tours for both beginners and experienced riders with all details and planning sorted out for the visitor. Tours can

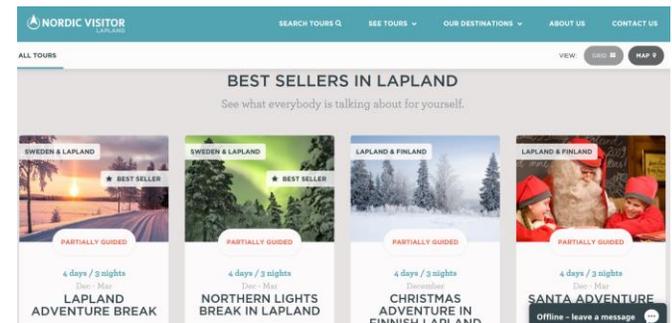
include the northern lights together with activities such as learning how to drive a dog sled, visiting a traditional Sami reindeer farm, staying in the ICEHOTEL, exploring local communities, gourmet local cuisine, or even a Santa adventure.

Harriniva Safari Tours, Finland – a five day snowmobile adventure. Includes air fares, winter clothing, accommodation, full-board, snow mobiles and a wilderness guide. The tour traverses 640 kms of trails.

The Harriniva area offers a range of winter adventures that are distinctive including winter glamping to view the northern lights.



Source: <https://www.harriniva.fi/en/destinations/torassieppi/aurora-glamping>



Source: <https://lapland.nordicvisitor.com/travel-deals/top-sellers/>

Leveraging momentum

WHAT 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.

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.

The tourism offer in Saskatchewan is diverse in terms of geography, activity and accommodation options, quality, access to infrastructure and overall market readiness. The level of industry cohesion, that is, the extent to which individual businesses network and collaborate to pursue higher level outcomes, can vary widely from strong to virtually non-existent. Local government support can range from the enthusiastic to the lukewarm, which is understandable given that the approximately 800 mostly-small communities in the province have limited resources and many service challenges and priorities.

Historically, tourism programs have laboured under limited local up-take and follow-through, which then leads to a sense of frustration and reluctance to support subsequent action.

Marketing is the one activity where progress has been made by destination area DMOs, but even then not all of them have achieved the same level of traction and success, and certainly not all are equally prepared to undertake more complex tourism development tasks. If it is accepted that a functional, receptive local environment is important, then identifying such local environments and working to create a pathway

of communication and collaboration that will further unlock this potential of product and destination development are needed for these geographic areas.

The existence of destination areas such as Cypress Hills and Waskesiu, in addition to Regina, Saskatoon and smaller cities such as Moose Jaw are areas that exemplify the potential to create progress and growth through cooperation and working together toward a common vision. These existing destination areas demonstrate that development does not occur organically or evenly across the province, and that it requires a sufficient concentration of facilities, attractions and stakeholder involvement for growth to begin to occur. Continuing to focus on these identifiable destination areas as a strategic priority, alongside potential new areas that show an interest in building a stronger regional cluster, will be more effective in generating growth than attempting to implement pan-provincial policies.

Gaining traction and implementing policies that are designed to have a catalyst effect, have a greater likelihood of being successful in these ‘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. This will result in a more geographically focused approach – one where existing momentum can be leveraged and where the impact of initiatives can be tested and refined.

Leveraging momentum

Similarly, working toward rolling out new programs and services needs to be undertaken with strategic regard for return on investment. A pragmatic approach to launching new initiatives through selective piloting and refinement is more likely to produce success and take-up of programs in the longer term, and will encourage a proof of concept approach to the development of new programs and services.

With this emphasis on destination areas and a piloting approach, an acceleration of sustainable growth and overall development of the industry is more likely to occur, and the destination can anticipate a stronger profile in the long haul market place.

Newry, Mourne & Down, N. Ireland

Newry Mourne and Down is a local government district (1,633 km²) in Northern Ireland that was created in 2015 through merging pre-existing districts following the reform of local government. In 2016 the District Council, with new roles and responsibilities in tourism development, embarked on developing a tourism strategy for the new jurisdiction. The area was characterised by a predominantly rural economy, a fragmented tourism offering and limited collaboration between stakeholders. Traditionally the area was successful in generating domestic demand, with the highest proportion of domestic visitors in the country, together with a high level of day visitation and peaked seasonality –

creating one of the lowest spend per trip ratios in N. Ireland and correspondingly low occupancy rates.

The strategy focused on repositioning the area to highlight its 'headline' offering: *Mountains, Myths and Maritime*. The emphasis was on building on the strengths of three key areas that were already recognized as destinations in their own right. The planning process identified a range of catalyst projects and critical infrastructure that would strengthen the destination experience, together with a series of initiatives that would further animate these areas. Subsequent work on developing a visitor experience development plan and building on the cluster/destination approach created a new sense of cohesion within each clustered area and a stronger framework for dispersing and moving visitors around the wider region. Through creating a narrative designed to bring the concept of *Mountains, Myths and Maritime* to life, and through an ongoing focus on establishing a new cluster support program, creating new events and experiences, and assistance with market testing, the three destination areas are making a significant impact on the overall regional tourism economy.

Local government district statistics for tourism released in July 2018, highlights the impact that is being made. Newry, Mourne & Down posted a 58% increase in overnight stays for the period 2015-2017, and an 88% increase in visitor spend – the highest in the country. Clearly, leveraging existing momentum has had a role to play in this success.

ACTIONS:

7. Prepare and maintain a list of destination areas that are currently poised to take on destination and product development projects.

- Establish clear criteria for what constitutes readiness. For example, areas that demonstrate good cluster and value chain characteristics, in addition to local networking and cooperation, are preferred. These areas should be potential candidates for any local rollout of programs and initiatives outlined in this Strategy.
- Communicate readiness criteria and an accreditation pathway so any aspiring region, area or community is able to participate in Strategy initiatives. Encourage candidates to self-identify so there is a "cluster of the willing".

8. Refresh existing and develop new planning resources that assist DMOs in undertaking product and destination development.

A current constraint to growth is the extent to which certain DMOs struggle with management, planning and operational tasks and issues. Maintaining membership is an ongoing challenge for many. A recent needs analysis noted that few engage in strategic planning, four in five had no formal marketing plan and nine in ten did not use market segmentation research such as Explorer Quotient.

Leveraging momentum

- Use the work on the economic impact analysis of tourism to demonstrate the value of a cluster-based approach to product development, while clearly recognizing and planning for the challenges. Demonstrate the benefits to be gained from strengthening the strategic focus on tourism within areas that have already established a degree of momentum.

- Develop new tools and resources for capacity building.

Good governance and planning direction will only yield results if destination areas have the resources for pursuing and implementing projects. Critical inputs are funding and human resources. The latter in particular is essential, as without it even access to funding will have a more limited impact. Entrepreneurship, economic development, volunteerism, and youth and Indigenous involvement practices all have the potential to be enhanced.

- Work with other ministries, agencies and service providers to help DMOs in building new partnerships that will assist in supporting implementation of this Strategy.

9. Develop a pilot project approach to launching major new initiatives.

The pilot project concept can blend risk management and return on investment considerations with the genuine need to “do business differently”, by pursuing innovative and ground-breaking projects that are going to make a difference in tourism development. Potential steps for moving forward could include:

- Host an annual competition for existing and potential destination areas for pilot project ideas that meet transformational and inspirational tourism development criteria.
- Compile and promote a compendium of minimum requirements, smart practices, pre-feasibility assessments and demonstration projects that destination areas and communities can use to develop their own projects.
- Create a pilot project implementation network of government agencies who could be called upon to broker access to their support programs and services.
- Develop work plan templates that can be used to initiate and track pilot projects with industry and community partners.
- Establish an understanding of return on investment and determine an appropriate strategy for a wider roll-out of pilot projects.

Advancing experience development

WHAT 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.

This is the core of the Strategy – whether it is in relation to the transformational projects, or whether it is about the development work that needs to be undertaken within existing destination areas and businesses across the province. It is fundamental to strengthening the market appeal of Saskatchewan. It has also been the central thrust of work undertaken by Tourism Saskatchewan’s Product Development team, particularly through the preliminary roll-out of the *AWEshop* program.

In other words, working towards *new horizons* will not mean a deviation from this strategic direction. Rather, this section of the Strategy seeks to build on the foundational work and the successes to date, through amplifying the emphasis on experience development and recommending new approaches that are in line with international best practices and will generate greater levels of return than has currently been evident.

ACTIONS:

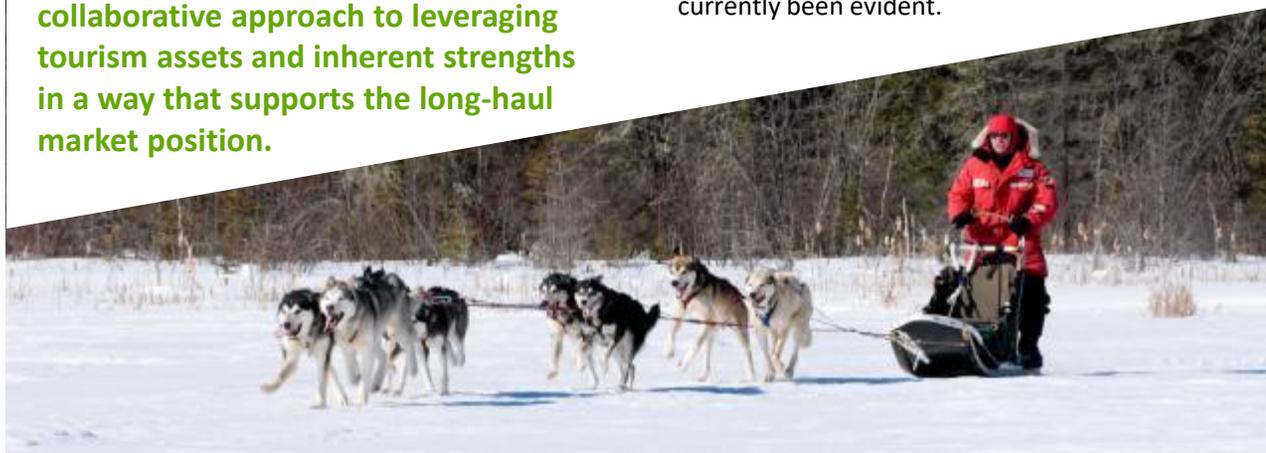
- 10. Build a strong positioning narrative that will animate the brand and its three pillars (land & sky, time & space, and community), and use this narrative to establish an experience development framework for the province.**

This Strategy has taken initial steps at articulating a narrative for the province as a whole. Four central themes or experience elements have been identified as the basis of summarizing the essence and key strengths of Saskatchewan:

- Embracing Saskatchewan life;
- Pursuing Saskatchewan adventure;
- Savouring Saskatchewan flavours;
- Experiencing Saskatchewan creativity.

As they stand, these experience elements may not appear to be entirely distinctive. However, they represent the province’s key opportunities for the future and now need to be used as a framework to build regional differentiation and identify the experiences that truly embody the essence and personality of Saskatchewan.

If done effectively, these elements will have significant capacity to create market presence. Developing and building experiences in the future, therefore, needs to be undertaken in a strategic context – one designed to enhance the brand, highlight the unique, bring the experience elements to life in a way that differentiates the regions, and provide the framework for pursuing selected transformational projects.



Advancing experience development

- Continue to work on the positioning narrative for the province as a whole with a focus on the four experience elements.

This task will involve Tourism Saskatchewan in a creative process that is cross-divisional. Developing a dynamic narrative is an extension of the branding process and will ultimately underpin the marketing message and related visuals.

11. Begin a process of visitor experience development planning – select a cluster-based destination area and initiate the work on a pilot basis.

- Develop a regional experience development framework and use it to identify potential and existing compelling experiences.

This planning process will identify a regional narrative that supports the provincial narrative. It will highlight key stories and underlying themes, and will provide a creative structure for building new compelling experiences and identifying ways of strengthening sense of place. An approach of this nature is less about the individual businesses and more about coming together as partners to create broader and more encompassing experiences that celebrate the unique characteristics of the region. Experiences that are ‘signature’ to the destination will elevate the region and will have a much stronger capacity to attract longer-haul markets.

At the same time, this planning and development process provides a deeper understanding of the four themes and the unique aspects of the regional destination for supporting businesses. These businesses in turn can reflect and add value to the key destination attributes. Best practice elsewhere demonstrates that this themed approach to developing destination experiences has a number of significant benefits, including creating a more cohesive destination, assisting with dispersal of visitors, lengthening the stay, extending the season, and developing new seasonal markets.

- Use the planning process to identify infrastructural gaps that will impact the quality and delivery of destination experiences, particularly in relation to accommodation and hospitality services. Include an assessment of sense of place. Highlight the implications of gaps and what is required to address these gaps together with any sense of place related issues.
 - Accommodation is known to be a key constraint. Identifying and prioritising specific gaps in relation to the delivery of compelling experiences within the province is an important task. This work will need to be followed up with partnership efforts to address the gaps and to attract the necessary investment through working with regional economic development agencies and the Provincial Government.

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.

There are many stories that make Saskatchewan a potential standout among visitor markets – from its Indigenous culture and its settlement and fur trade heritage, to its leadership position as a cutting-edge producer of agricultural products. The province played a vital role in opening up Canada’s west with historical resources that relate fascinating tales of survival and adaptation in a harsh landscape; of warfare, resistance and reconciliation; of industrial development; and of communities built around collectivism, ingenuity and a long list of captivating characters and events.

Some stories such as the Trails of 1885 and the Northwest Rebellion, and the birthplace of Canada’s universal health care system are familiar to Canadians, but many more are untold or unknown beyond the custodians of the museums, archives and historical societies who manage to keep these memories alive. These stories are the bedrock for the experience development program and have exceptional potential for turning undifferentiated visitor products into experiences that are unique to Saskatchewan. They are key to how Tourism Saskatchewan promotes the brand to travel influencers, media and trade, and have the capacity to

Advancing experience development

strengthen existing itineraries as well as providing the basis for regional differentiation. Identifying and beginning a more strategic focus on curation of stories will set the stage for rolling out wider experience development planning and supporting programs following initial pilot testing, while providing content to assist local entrepreneurs and communities with enhancing experiences and animating small towns outside of any pilot work.

- Initiate a Story Project that entails collecting and composing historical, natural and economic snapshots or narratives that would be made available to industry and communities for product and experience development. This is more than a simple, static inventory of stories, but instead should be regarded as a living, organic repository that is curated over time with copy and audio-visual resources that align with Saskatchewan's target segments.
- Seek out early-stage partnerships. Saskatchewan Heritage Foundation, SaskCulture and educational institutions, historical societies and various community and industry groups all have potential roles to play as information and story curators.
- Investigate how user-generated content (UGC) technology can play a role in making the Project relevant and accessible for all potential contributors. Destination Canada's use of a UGC Partner Network powered by CrowdRiff may be worth exploring.
- Identify and roll out the Project in one or two pilot areas where there is an existing level of buy-in, critical mass and leadership to ensure local support. Ideally the piloting will take place in a destination that is also being used to pilot the visitor experience development planning process, as this is a complementary support program.
- Following the identification of theme-based experiences, promote uptake and use of story content to industry and operators to improve their ability to build brand and regional themes into their own destination, product and market development.
- Use the Project to support the narrative associated with transformational projects. With the Protein Museum concept, for example, there is a need to research and highlight stories that will make the concept relevant and dynamic to the various audiences and will allow it to leverage existing attractions and experiences. Themes and stories to explore include:
 - The evolution of technology in farming – why, where and how, together with a spatial mapping of these stories and sites of related experiences on the ground. This will allow for linkages and cross-selling through connecting with related visitor products.
 - Saskatchewan's global position in the production of pulses – the story of modern production.

- The role of ethnic cultures in developing this agricultural supremacy – including building linkages with and strengthening the profile of existing farms and farm systems that have a strong cultural component – for example, the Hutterite farms.
- The emergence of local flavours associated with the province's specialism in agriculture and the cross-over between this transformational project and local foods – again using the theme to bring existing product to the forefront and to provide a basis for elevating current community activities as intriguing visitor experiences, such as the Blackfox Pumpkin Festival.

In a similar manner, the Geopark initiative can provide the basis for bringing related themes to the fore elsewhere in the province – the story of 'land' and 'time' – the geological heritage and how this has shaped today's landscape and ecosystems, and how Indigenous and European settler 'community' life and culture over the centuries can only be fully understood in the geological context. Here again, a transformational project can create strong linkages with disparate offerings such as Manitou Lake, the Big Bert fossil site near Carrot River, and wider pan-Western product.

Advancing experience development

- In developing the Story Project, explore the potential role of gaming technology as a content purveyor.
- Develop an awareness program (familiarization tours, workshops and/or webinars) to support the Story Project in terms of collecting and curating content, and in its use in developing experiences and marketing destinations.

13. Restructure the *AWEshop* program to support the implementation of the Visitor Experience Development Plan(s).

The *AWEshop* program has begun the process of raising industry's awareness on developing new experiential tourism products through workshops and individualized support for businesses. This program provides the basis for building a more targeted approach to creating experiences at the regional destination level – theme-based experiences that are integrated and promote the unique stories and elements of the destination. This approach brings businesses together to work in offering a stronger and more compelling 'packaged' product that is authentic, immersive and allows the visitor to truly connect with the essence of place, culture and lifestyle.

- Restructure and reposition the program as a cluster support program and pilot it within a destination that has completed a visitor experience develop plan.

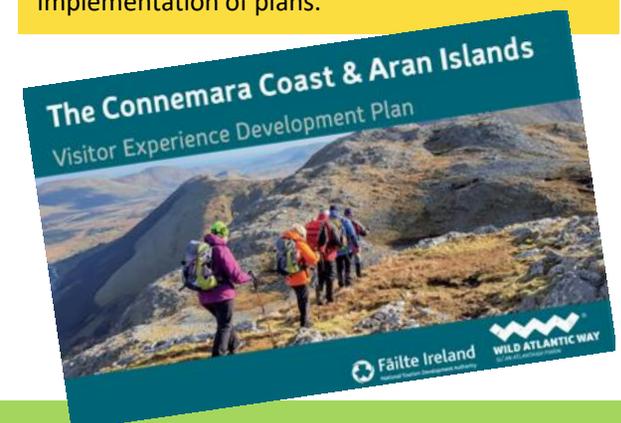
The plan will have identified preliminary 'signature' and supporting experiences, and these will now need to be nurtured to full market and export readiness. Clusters are likely to vary in their needs, and each cluster of businesses will need to be supported according to these needs. The program should offer mentorship in pricing, sales and marketing, digital and social media strategies, market segmentation, cross-selling, travel trade engagement, and content development.

- Develop a supporting program within Tourism Saskatchewan to assist in market testing the emerging concepts.

The Wild Atlantic Way – Visitor Experience Development Plans

Fáilte Ireland has developed a series of four regional experiential brands to strengthen the positioning of the Republic of Ireland in the overseas market and to assist in creating a narrative for the country. The work on bringing the Wild Atlantic Way to life as a brand through creating a series of visitor experience development plans has led the way in this strategic approach to marketing and developing what Ireland has to offer. The route is 2,600 kms in length and is a branding and repositioning of what was already there – roads, towns and villages, existing sites and attractions, spectacular coastal scenery, and outdoor activities. However, given its length, there was a need to develop

brand aligned local destination experiences which would differentiate regional stretches of the route and provide compelling reasons to stay longer to explore the area at a more granular level. Businesses and supporting agencies work together to create a regional theme-based narrative which is then used as a framework to develop a series of new 'hero' experiences and enhance existing hero products, while also strengthening the businesses that support these hero themes. The planning process provides a new perspective and a fresh way of looking at what destinations have to offer. Together with the follow-up mentorship activities, the program plays a key role in bringing new and sometimes non-traditional partners together, and it is proving to be a catalyst for the development of new businesses. At the same time it creates cohesion to the work of supporting economic development and cultural heritage agencies, local government, and national partners – all of which are involved in steering the projects and in the implementation of plans.



Advancing experience development

14. Work with partners to establish a strategic high-level approach to developing cluster-based experiences that will highlight the four experience elements.

This work complements the destination-focused visitor experience development planning. A wide range of activity or theme-based concepts were brought forward in the planning process and this section seeks to highlight the key opportunities. Pursuing a thematic opportunity is an approach that is likely to be particularly applicable to areas outside of recognized destinations with visitor experience development plans in place, and provides an alternative context for exploring product development potential.

The four experience elements together represent what makes Saskatchewan distinctive and potentially intriguing as a destination to visit. The assets are largely in place – the physical landscape, the parks systems, the community events and festivals (including Indigenous activities), local attractions, outfitters, the renowned fishing and hunting activities, trails and related activities (particularly snowmobiling), local restaurants, the farmscapes, culture and heritage sites, and the province's arts and craft product including visual and performing arts. Clearly, the 'pieces' are in place, but the present offering is fragmented and does not stand out from the crowd.

Winter, for example, has much to offer the visitor, but understanding the nature of the experience, finding it, or being inspired by the supporting infrastructure and accommodation options are challenging and essentially curtails the growth of this sector and prevents it from being visible to the longer-haul markets.

- Consult with industry champions possessing field-proven knowledge and pursue ongoing discussions to identify strategic development priorities, commencing initially with the opportunities identified in the remainder of this sub-section.

These discussions and related initiatives will complement the development of visitor experience development plans and vice versa. It will be important to ensure that the identification of opportunities aligns with emerging market trends, such as the growing interest in micro-adventures that combine nature, culture and activity to create a multi-faceted experience offering a range of benefits – challenge, personal transformation, authentic connection, the novel and unique, and a sense of well-being. In the absence of regional visitor experience development plans, this work will be important to strengthening the four experience themes and associated narrative across the province.

- Meetings can be facilitated online to increase the geographic spread of representation and discussion.
- Identify cluster-based opportunities and support further development of these clusters through a customized AWEshop support program.
- Identify synergies between initiatives – accommodation, for example, is referenced in relation to a number of opportunities. Its development in the context of one opportunity may open up potential for further cluster-based development of complementary activities.
- Develop a series of short working plans based on the opportunities outlined for the following areas (see pages 42-47), ensuring that the plans align with the four experience elements:
 - Life in the north
 - Winter in Saskatchewan
 - Food and farming
 - Indigenous tourism
 - Creative and cultural heritage sector.

Advancing experience development

Areas of experience development opportunity

The following areas of opportunity for experience development were identified in the planning discussions. All of them represent concepts and niche experiences that could strengthen the differentiation of Saskatchewan as a destination. Equally, all of them are areas where substantial product and experience development is required to create sufficient profile and the critical mass needed to attract new markets.

LIFE IN THE NORTH

The North offers the potential to create bespoke and intimate cultural and adventure experiences that will appeal to ‘cultural explorers’ and ‘authentic experiencers’ from the overseas and longer-haul markets. These experiences should tell the story of life in the north – what shapes the local lifestyle and economy? How has the local culture evolved? Why is the landscape distinctive with its one hundred thousand lakes and its boreal forest? The cost of travelling to the north will remain a constraint. It will therefore be imperative to create experiences that are perceived as having sufficient value to counter the distance factor.

- Identify and map existing and potential activities and experiences that highlight the life of locals, including local events and festivals. How many operators exist? What are their services? How market ready are they? This inventory needs to be verified and maintained at the local/regional level.

- Work with local business operators to determine how existing experiences could be further enriched with new activities, and identify key constraints that can be addressed in the short term. Areas of consideration include:
 - Working with the Denesuliné people to develop a **Dene cultural experience** that captures the story of their life in northern Saskatchewan for well over eight thousand years, their spiritual connection to animals, their involvement with early Europeans, and their current lifestyle. Consider providing accommodation in a traditional log cabin.
 - Developing a northern trapping experience.
 - Creating opportunities to get involved in local community sports – curling, cross-country skiing and trails related activities.
 - Offering a truly immersive experience living with an Indigenous family for 2 to 3 days as part of a broader northern experience.

The individual activities are not necessarily unique in themselves. The difference will be made in bringing a number of these together into a compelling experience. The quality of the experience, its seamless nature, the storytelling and guiding elements, and provision of equipment and appropriate clothing, and suitable or distinctive accommodation are all important elements in creating an experience that will stand out in the marketplace. Bringing these elements together is not necessarily intuitive – rather the

focus will need to be on developing mentorship programs that can be customised and delivered to meet the needs of a potential cluster.

Again undertaking work on a pilot basis will minimize risks associated with investing in new programs. Partnerships between all levels and types of stakeholders will be fundamental to making things happen and to being successful in taking new experiences to market. Developing appropriate accommodation, packaging effectively and working with a tour operator have the potential of opening this experience up to new Asian markets.

Airship tours to the Athabasca Sand Dunes

represents a particular iconic opportunity to consider developing over time. These are the northern most dune system in the world and are only accessible by air or boat. Local Denesuliné lore provides interesting stories and mythology on the formation of these dunes, while the geological explanation ties the formation back to the last glacial period, and again highlights the significance of Saskatchewan’s geological heritage as a tourism asset. Developing exclusive tour packages to this area would offer a very compelling product to overseas markets.

- Leverage the discussions that are currently underway on looking at the opportunity hybrid airships offer on accessing the north and transporting commercial goods and foodstuffs, equipment and people to areas that are otherwise exceptionally difficult to reach.

Advancing experience development

Maintain dialogue with all government ministries that have a vested interest in airship access to the north and highlight the tourism perspective when appropriate.

- As progress is made, consideration will need to be given to the support services and related infrastructure, including guiding services and accommodation. Exclusive glamping or yurt options would align well with this type of travel experience.

WINTER IN SASKATCHEWAN

Winter remains a largely untapped opportunity in the province, particularly at a time when Canada as a whole is seeking to draw attention to winter in a new and more dynamic way, which is in line with an emerging interest in winter getaways within winter climates.

Snowmobiling – the province has a rich, well connected, trails asset base for snowmobiling with electronic live mapping, good signage, good grooming and maintenance, and supporting infrastructure (insulated safety shelters with stoves, fire pits and stocked with wood). While this activity is popular for local Saskatchewan residents, the opportunity lies in strengthening it as a demand generator for out-of-province visitors. The following tactics highlight immediate priorities for building snowmobiling as a compelling market-ready experience, and will complement work undertaken on the iconic snowmobile trail transformational project.

- Identify areas with the strongest potential to develop a compelling snowmobiling experience. Consider developing the multi-day winter tour snowmobile transformational project concept and undertake a comprehensive assessment of the asset base. The key gaps are likely to relate to lack of rental opportunities, insufficient number of guiding operators, and insufficient availability of quality accommodation along the trail(s) that would be particularly appealing to longer-haul markets.
- Work with businesses and local and regional agencies to identify ways of growing the spectrum of supporting businesses and develop the types of partners that will be needed in this cluster initiative. Establishing a network of rental outfitters will be critical in developing this opportunity.
- Identify accommodation requirements to complement what already exists (for example, Elk Ridge Resort, and accommodation in communities such as Nipawin and Carrot River). Assess the opportunities to develop innovative accommodation (fixed roof and glamping) that would add to the overall appeal and unique quality of the experience.
- Assess opportunities to add value to the trail riding experience through incorporating a range of complementary activities within an experience package – such as northern lights, Indigenous activities, winter camping, ice fishing, and sledding.

Winter ecotourism in the boreal north. The boreal forests offer an invigorating setting in winter that could be further utilized as a backdrop for new ecotourism experiences.

- Select a pilot destination area and work with local businesses to define and analyse the business opportunity for developing a boreal forest winter ecotourism adventure.
- Assess accommodation requirements. Here again, the lack of distinctive higher-end accommodation is likely to be a constraint on promoting a unique and compelling experience. If necessary, build a preliminary business case for new accommodation resort facilities that would support the expectations of longer-haul ecotourism markets. Focus on smaller-scale to provide the intimate feel that many guests are seeking in this type of experience.
- Develop complementary activities such as winter photography and dark skies activities. Combine these activities with ‘cosy’ and ‘intimate’ winter experiences – either indoors or outdoors. Storytelling will be a key component and offers the occasion to add a winter perspective to stories generally recounted in summer months.

Advancing experience development

Winter cultural festivities offer the potential to celebrate the way in which art and music have traditionally been ‘back-bone’ activities to the people of Saskatchewan during the long winter evenings. Festivals and events in winter can play a key role in highlighting the winter theme and extending the conventional visitor season.

- Develop an inventory of existing winter cultural events.
- Identify events with the potential to expand and strengthen.
 - Focus on strengthening the winter music festival in Moose Jaw to create a signature cultural winter event. Use the event to create packages of incremental activities such as snowshoeing tours, that will encourage extended stays.
 - Review similar events elsewhere to identify opportunities for growth and event development.

Jasper in January

A three-week party in January. This is how the town’s premiere festival of adventure, food and the arts is positioned – an event that has been hosted for almost 30 years. With a mix of programming – free and ticketed – and a range of activities that will ensure wide market appeal, this festival is all about celebrating winter. With themed events from dark sky snowshoeing to brewery tours, and unique activities such as a 20-hour medieval sword-fighting course, the festival is very successful at animating the town and national park and generating a high level of visitation in winter.

Calgary’s winter festivals

If music festivals can be a significant draw in summer, why not in winter? In the dead of winter, Calgary hosts the Big Winter Classic. With over 80 bands, the event is regarded as “the weirdest, most diverse and inclusive arts festival” in the city. The collaborative event highlights the local breweries and the combination of music, art and beer is designed to “drive people from their homes in the dead of winter to dance, mingle and share in a collective experience” (Festival founder).

Building on the success of this event in January, the city now offers a new event in February – the Block Heater Festival – again showing that winter is a time to take a break, have fun and celebrate. Block Heater brings an entire neighbourhood to life and promotes a range of genres including a series of Indigenous events.

FOOD AND FARMING

Currently this leading economic sector has limited involvement in tourism. Unlike many other provinces, the concept of farm tourism and the drive to diversify farm incomes have not been a priority. This reflects the sector’s focus on highly modernized and mechanized practices where the concept of a visitor experience is generally not considered a relevant opportunity or priority. However, given Saskatchewan’s world leadership in many aspects of farming, the province’s growing profile in culinary tourism, and the potential to create new linkages between the culinary experience and the farming economy, this is an area where distinctive visitor experiences for both specialised tours and leisure visitors could be developed. Such experiences have the potential to both diversify farming where there is a relevant opportunity, while also meeting the Ministry of Agriculture’s objective to *improve society’s trust in, and acceptance of, modern agriculture*. In turn, promoting an awareness of the farming sector, will support the growing significance of the culinary sector.

In addition, raising the profile of farming will directly support the concept of the Protein Museum transformational project and, taken together, have the capacity to be of particular interest to specialised out-of-province study groups.

Advancing experience development

Farm tourism

- Develop an inventory of existing farm experiences and community related events such as fall suppers. Identify farming themes that are being promoted and undertake SWOT and gap analyses of these experiences.
- Include Ministry of Agriculture regional staff in the destination area visitor experience development planning processes, and assess the potential for developing farm experiences aligned to the narrative framework. Similarly, include regional staff in any other related discussions.
 - Work with the ministry to refresh the Ag Awareness initiative to ensure that development tools and resources are fully positioned to support the development of new or enhancement of existing farm-based experiences. The type of experience will need to be carefully matched to the targeted audience. Experiences for specialized markets may be distinctly different to experiences for the leisure market – specialized groups travel year-round and study-based experiences should be developed for all seasons.
 - Implement a partnership-based pilot mentorship program to support new diversification initiatives and to assist with messaging and storytelling in this context, recognizing that the farm sector is generally unfamiliar with the needs and expectations of visitors.

- Review Agribition, Ag in Motion and the Farm Progress Show from the perspective of special interest visitors. Identify new opportunities to extend the visitor stay through add-on theme-based site visits that are packaged with quality accommodation, local food experiences and local cultural entertainment. Work with a specialized tour operator to market these packages to targeted audiences.

Culinary tourism

The culinary sector is a niche sector in its own right, although it also has the potential to be used as a means of strengthening farm tourism. Saskatchewan's strengths in food and artisan drinks have grown significantly, and there is potential to leverage these further through a more focused approach to its ongoing development. In addition, food can be used as a theme to encourage people to move around the province to experience its array of flavours that reflect 'land and sky', 'time and space,' and 'community'.

- Develop an inventory of all culinary events and assess their strengths. Work with partners to continue building Taste of Saskatchewan as the signature culinary event, and consider developing regional versions of this event in different seasons and locations.
- Involve partners that can review the implications of health and safety legislation to ensure that the legislation does not constrain the growth of this sector unnecessarily. This may require research on practices in other jurisdictions.

Okanagan Wine Festivals, BC

The Okanagan Wine Festivals have evolved into four signature events for the wine sector in the Thompson Okanagan – one for every season. Each festival is spread over the region, with the Fall Wine Festival now entering its 40th year and featuring 165 events over 10 days. This festival, with its mix of arts, culture, food and wine, attracts 60,000 consumer visits – many are out-of-country wine tourists – and generates \$4.8 million in direct economic activity. The Spring Festival acts as the launch of the main wine season, and attracts 30,000 unique consumer visits while generating \$1.9 million in direct economic activity.

Feast of Fields, BC

Feast of Field events are held annually in the Okanagan Valley, Southern Vancouver Island and Metro Vancouver regions. They are designed to celebrate local food and showcase local, sustainable food systems across BC. It is a gourmet food festival which aims to create meaningful interactions between food producers and makers, and the guests. Held on local farms, in orchards and at heritage sites, Feasts of Fields have been growing in popularity over their 24 years of operation. The events are the main means of fund raising for FarmFolk CityFolk, a charitable organization which advocates for sustainable agriculture, and supports building strong linkages between farm and city, and producer and consumer, while providing a highly popular tourism event.

Advancing experience development

- Encourage the culinary sector to build strong internal linkages within the supply chain that improves accessibility to local produce and strengthens the concept of provenance. This can be achieved through elevating the profile of local producers and associated stories, and developing innovative regional farm to fork events in farm settings.
 - Support the establishment of a Saskatchewan Culinary Association if there is sufficient interest.
- Continue to use culinary tourism to support the development of Saskatoon and Regina as destinations.
 - Support initiatives that incorporate food elements and continue to emphasise the need for local foods, authenticity and quality from all food outlets – from food trucks through to eclectic restaurants and cafés.
 - Explore how food can be used to further animate gathering spaces and create micro destinations. Use the food story to promote interest in rural destinations.

INDIGENOUS TOURISM

Indigenous tourism in Saskatchewan has the potential to be a product and destination differentiator with demand and supply conditions trending upward. ITAC research indicates that more than one in three international visitors to Canada are interested in Indigenous tourism experiences, with major in-bound markets from Europe, USA and Asia all represented. In response, the Indigenous tourism sector in Canada has grown substantially over the last decade, with significant investment in travel services, retail, gaming, accommodation and outdoor recreation. Indigenous communities in Ontario, BC and Quebec have been leading the way, attracting investment to community and business projects that bring in new visitors, new spending and much needed community economic benefits. Saskatchewan has also had its successes, for example Dakota Dunes and Wanuskewin, yet the Indigenous share of the province's population (second only to Manitoba among Canadian provinces) suggests the upside potential is largely untapped.

The challenges facing Indigenous tourism business development mirror those facing the industry as a whole. Approximately only one in four Indigenous tourism businesses in Saskatchewan is thought to be market-ready and very few are export-ready. Access to infrastructure, a qualified labour force, business and capital support, and, importantly, a lack of community support, are holding back aspiring entrepreneurs, despite many examples of strong

interest in and commitment to bringing new visitor experiences to market. Perhaps unique to the Indigenous agenda are the challenges reconciling and fitting authentic experiences into the broader context of socio-community development.

Rejuvenating languages and sharing social traditions are aspects of business development non-Indigenous businesses rarely have to deal with.

ITAC has laid the groundwork for expanding Indigenous tourism in Saskatchewan by focusing on partnerships and product development as one of its four strategic pillars. It has acknowledged the need for a fresh strategic direction for leadership and growth within the province, and is taking steps to facilitate multi-stakeholder support to that end.

- Utilize the resources that already exist within ITAC and other organizations to help Saskatchewan product and destination development prosper.
- As recommended in Action 5, work with ITAC to help establish an Indigenous Tourism Association of Saskatchewan.

The need for an organized group of Indigenous tourism businesses was identified at the 2018 ITAC International Indigenous Tourism Conference in Saskatoon. An accessible and dynamic environment for enterprise facilitation would get more Indigenous entrepreneurs involved in developing tourism business communities while helping communities improve and expand their economic potential.

Advancing experience development

- Grow the number of experiences to market in the following key areas:
 - Lifestyle experiences – including the traditional use of plants in daily life and medicine, creative activities, and cultural practices.
 - Outdoor recreation based on traditional activities, including interactions with the fur traders.
 - Iconic accommodation.
 - Culinary experiences and traditional approaches to curing and preserving foodstuff.

Indigenous culinary experiences provide the potential to develop additional elements to both the more mainstream culinary sector and the Indigenous tourism sector.

- Assist Indigenous stakeholders in developing culinary experiences as stand-alone activities or as ways of strengthening wider cultural experiences. Highlight unique elements such as foraging and how to use wild ingredients in traditional dishes, and combine with storytelling and other appropriate cultural elements such as music.
 - Encourage asset mapping by season, place and people.
 - Explore opportunities to promote the theme of culinary fusion and the interplay of different cultures in today's cuisine.

Wanuskewin Heritage Park – Saskatchewan has a unique opportunity to gain stature in Indigenous tourism through the proposed Wanuskewin World Heritage Site (currently on the UNESCO tentative list) – both as a destination in its own right and as an attraction that raises interest in other Indigenous cultural attractions and experiences. Wanuskewin should be regarded as the **flagship experience** in Indigenous tourism.

- Consider selecting Wanuskewin as a destination area for a pilot visitor experience development plan and work with partners to build a strong narrative framework for destination experiences. Identify and strengthen experiences in the wider area to complement the Wanuskewin experience and to create interest in Indigenous cultural tourism elsewhere in Saskatchewan.

CREATIVE AND CULTURAL HERITAGE SECTOR

The province has already established a strong position in the creative and cultural heritage sector, enhanced through the addition of the Remai Modern and attractions such as the RCMP Heritage Centre, and through the award-winning status of many artists and artisans.

This is a sector that has considerable potential to be further developed in a strategic way that brings communities to life and animates the four experience elements. The creative and cultural heritage sector can stand on its own with its range of existing attractions and activities, but equally there are opportunities to develop more integrated experiences that absorb aspects of this sector into

experiences offering adventure and insights on local Saskatchewan life. Again, working collaboratively will be key to building new opportunities. In particular, undertaking this work within the context of visitor experience development plans will provide a structure and narrative framework for the development work.

Areas of consideration for the development of new experiences and the enhancement of existing creative activities:

- Work collaboratively to develop an authentic **'cowboy and western' experience**:
 - Partner with farms that can offer host ranches and bunk houses, ensuring that the quality to be offered is high.
 - Integrate existing community activities such as rodeos and cattle round-ups into an experience that is inclusive of quality farm/ranch-based accommodation and local food.
 - Work with near-by businesses to strengthen and enhance the overall cowboy and western theme.
- Work with the **visual and performing arts sector** to identify new approaches to highlighting the work of Saskatchewan artists to the visitor. This activity should be integrated into the visitor experience development process recommended for destination areas, where the connectivity between tourism and the arts can be more readily understood – particularly within the context of a themed narrative.

Strengthening enablers

WHAT 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.

Business development

The need for a comprehensive and multi-faceted business development program was a recurring theme throughout the consultation phase. The needs are diverse and range from succession planning to developing entrepreneurial skills in all areas of the tourism industry.

ACTIONS:

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.

- Coordinate and strengthen diagnostic and planning tools that can be used to complement direct, one-on-one facilitation services offered by Tourism Saskatchewan and its partners. This initiative should be designed to enhance outreach and provide more targeted assistance and mentorship to potential business clients, and ideally should not be positioned as a series of self-help tools.
 - Develop ‘toolkits’ around three dimensions: specific product niches (e.g. winter tourism), functional needs (e.g. becoming market ready) and target destination areas. By linking these dimensions together, the toolkits will be sufficiently granular to be relevant to

communities and small businesses. A modular approach will allow flexibility in meeting the changing needs of different destination areas – particularly where transformational projects are under consideration or being developed – and can be expanded over time to ensure that the toolkits offer maximum flexibility in their use as business development tools.

- Work through existing tourism, economic and community development agencies and programs to scope, scale and deliver the toolkits, identifying expected targets and outcomes.

By structuring business development services and the content of tool-kits around the specifics of a destination area or transformational project, the programming and the expectations set for participating businesses can be tied to destination-level outcomes. Rather than focusing on generic objectives, businesses will be encouraged to pursue mutually supportive development objectives that will facilitate growth and development of the immediate destination and/or transformational project. Experience development, for example, will be supported within a wider thematic context where the growth and development of experiences elevate the entire destination rather than the single business entity.

Strengthening enablers

It is anticipated that this will make it easier to generate awareness of business development services and will increase their uptake by tourism businesses, while filtering out those businesses that are unable or unprepared to go to the next level in their visitor offer.

- Investigate establishing a tourism incubator as a successor program to the toolkits initiative.

Paris was the first city in the world to open a specialised tourism innovation incubator centre and is now developing an International Tourism Incubator Network with one partner to date in Canada – MT Lab in Montreal. Whether as part of this network or a Saskatchewan-based approach with a similar focus (on incubation of start-ups and young entrepreneurs, the identification of and experimentation with innovative solutions, and the attraction of inward investment), a tourism incubator within the province could address many of the deep-rooted business planning, succession and investment constraints facing the tourism sector today. The program should have a particular emphasis on niche areas that hold potential for future growth, including winter tourism, Indigenous tourism, and agricultural and manufacturing related tourism to assist in creating a more clearly defined development path for

aspiring entrepreneurs. The incubator could be partnered with organizations like SEDA, STEC, Community Futures and Square One that already have expertise in the field.

- Work with ITAC and Indigenous partners to customize the toolkits and incubator services to meet the unique needs of Indigenous entrepreneurs. There are transformational projects and destination area that will be Indigenous-led initiatives, and the business development services will need to incorporate additional elements such as community and elder involvement, cultural sensitivity, social licence and best practices for traditional Indigenous entrepreneurship.

Paris&Co – Welcome City Lab

Welcome City Lab established in 2013 is a first of its kind. It is dedicated to assisting young entrepreneurs, initially in Paris, to assimilate innovation and to open new doors for them within the broader tourism industry. Its focus is on inward investment attraction, incubation of start-ups, experimentation of innovative solutions, and animation of the Parisian ecosystem. It aims at identifying and testing new innovative solutions, and working with young entrepreneurs to go further and faster through integrating these solutions. It provides economic intelligence through identifying innovative trends across the world and monitoring the impact of these trends. Participation is based on an annual application process. Between 2013 and 2017, Welcome City Lab had incubated 70 start-ups, established 80 new collaborative partnerships between entrepreneurs and funding partners, which together and in turn resulted in the creation of 400 new jobs. Funding options include subsidies and loans based on zero percentage interest rates through key financial partners.

Welcome City Lab is now spearheading the growth of the concept as an international network of similar centres and as a national network of incubation centres within France – creating opportunities for the international exchange of mentorship and insights in new markets.

Strengthening enablers

Investment attraction

Tourism is the fourth largest sector contributor to provincial GDP with excellent potential for growing visitor spending and for increasing contributions to the export economy through growing demand from elsewhere in Canada, the United States and overseas markets. However, to leverage business development efforts, Saskatchewan will need a focussed and proactive approach to attract new domestic and foreign investment to the tourism industry.

ACTIONS:

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

- Develop a risk-return rationale and a foundational message to build an understanding of and interest in Saskatchewan tourism as an investment destination.

Work with the Ministry of Trade and Export Development (TED) to raise the profile of tourism as an investment target and integrate it into its trade development programs, including developing an online presence of the message. The opportunity for tourism job growth and export development will contribute to the government's economic objectives. TED's cooperation could strengthen tourism awareness and consideration in regulatory, financing and policy matters. With an

increased emphasis on documenting the value of tourism (Action 1) it will be easier to promote its economic contribution to the provincial economy and further raise the industry's profile among senior managers across government, regional tourism organizations, and local government.

- Leverage government programs to support projects that encourage or facilitate product development, including any new capital fund program.
 - Explore potential incentives that target tourism as a non-traditional sector to assist in promoting the development of tourism infrastructure, innovation and products designed to promote economic diversification and job creation.
- Identify provincial infrastructure and assets that can be leveraged for investment attraction and develop partnerships specifically in support of transformational projects, destination cluster areas and pilot initiatives.
- Develop an investor outreach program that supports projects identified in destination cluster areas, including potential transformational projects, through initiatives such as working with TED to host site familiarization trips in the province.

Capital funding opportunities

There is a strong case for establishing a new funding program that will support grass-roots development and initiatives aligned to this Strategy. Looking elsewhere, a focus on product and experience development has often resulted in new grant schemes which are regarded as a critical inputs in supporting economic development and tourism growth outcomes. In Alberta, for example, the Tourism Growth Innovation Fund is a project-based funding initiative designed to support both destination development and product development.

Currently Western Economic Diversification is one of the few sources of potential funds, but this can be difficult to access on a wider basis within any given province, although funds have recently been made available for two Indigenous tourism projects in Saskatchewan.

ACTIONS:

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.

- Identify the key objectives of a selective capital grants scheme and highlight the way in which these objectives support the *Saskatchewan Plan for Growth*.

Strengthening enablers

- Determine criteria and related preferences and use the program to facilitate development that is likely to have significant regional or provincial economic impact. Supporting the growth of winter tourism, for example, can be prioritized as the province seeks to build stronger recognition for winter-related experiences. Equally, improving quality needs to be built into the criteria.

In the early stages of such a fund, ensuring that it supports development within recognized destination areas or initiatives related to transformational projects will assist in leveraging existing momentum. Seeking matching or partially matching funds will also add value to the process.

Fáilte Ireland: Grants Scheme for Large Tourism Projects

This scheme was launched in 2016 by the national tourism development authority and provides capital grants above €200,000. It is specifically aimed at stimulating innovation and improving international competitiveness through supporting the development of world-class visitor experiences and regional economic development. **A parallel program for small tourism innovation projects** has also been established to support smaller complementary initiatives. The fund is based on an outcome led approach to financial support and is intended to promote the

involvement of diverse public, private and community sector parties in the achievement of a set of outcomes for Irish tourism. Proposed projects have to demonstrate their capacity to deliver against the set of outcomes that include:

- Increasing visitor spend and length of stay, and stimulating international demand
- Creating employment opportunities
- Leveraging public and private sector investments in the visitor experience
- Financial sustainability
- Innovation and new tourism product development, including improving storytelling and revealing hidden gems
- Improving the experience in attractions and historic towns important in their own right
- Community engagement

The proposed projects are expected to support key tourism brands such as the Wild Atlantic Way and Ireland's Ancient East, and align with related visitor experience development plans where these exist. A total of €65 million is available for the large projects for the first five years, with the maximum grant that a project may receive being €5 million, although larger grants may be awarded in exceptional circumstances. In 2018 Fáilte Ireland was working on over 75 capital projects across the country.

Human resources

Tourism sector associations in Canada have consistently identified labour and skills shortages as a top priority need moving forward. Tourism HR Canada has indicated that the country's projected deficit of 64,000 tourism jobs within the next decade will occur in all major tourism industries, including food services, accommodation and transportation, and will have major adverse effects in the form of hampered growth, foregone investment and higher operating costs¹. According to the Conference Board of Canada, Saskatchewan tourism labour demand will increase more than 30% between 2018 and 2035, while total labour force growth will only be two-thirds of that². Expected tourism demand in Saskatoon and Regina will be even greater, so the issue is not isolated to rural areas but to the entire province. Interestingly, tourism labour demand growth in Saskatchewan will be the highest amongst all Canadian provinces through to 2035.

¹ Tourism HR Canada, June 2018, Presentation STEC Employer of Choice Networking Breakfast

² Tourism HR Canada and Conference Board of Canada, 2016, *Bottom Line: Labour Challenges Threaten Tourism's Growth*.

Strengthening enablers

ACTIONS:

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.

- Continue to implement the Tourism Saskatchewan labour strategy with its focus on:
 - Working with the tourism industry to implement effective human resource practices;
 - Increasing participation and advancement of under-represented groups in the tourism workforce;
 - Increasing awareness of the benefits of working in the tourism sector.

These efforts can be expanded through industry advocating for a tourism sector Temporary Foreign Worker program that has a built-in pathway for residency status and involves job sharing among businesses to make it more amenable to rural and SME needs.

In addition:

- Work with partners to leverage potential new sources of labour supply, including immigrant communities, temporary foreign workers, retirees, and particularly Indigenous people, to assist in fulfilling labour demand in major cities as well as the north.

- Strengthen the dialogue between the Saskatchewan Tourism Education Council (STEC), educational institutions such as Saskatchewan Polytechnic and industry. Focus discussions on identifying critical gaps and skills needs in relation to this Strategy and the overall requirements of the tourism industry. Areas that will require new or ongoing programming include:
 - The agricultural sector and the opportunity to provide it with the knowledge base to diversify into tourism;
 - Indigenous tourism and a greater emphasis on customized training for Indigenous tourism stakeholders, together with support for Indigenous research and enhanced tourism awareness programs in secondary schools;
 - Quality assurance and an overall greater level of emphasis on developing business acumen.
- Assist with the process of identifying placement opportunities for students within cooperative programs.
- Work with partners and the Ministry of Advanced Education to reassess certification processes, and identify new opportunities for recognition of ongoing experience and the development of new formats of program delivery, including open learning, online delivery and part-time programming.
- Review STEC's programs within the context of this Strategy, including:
 - Monitor, evaluate and propose follow-up to STEC's involvement in the Destination Employment pilot project, carried out in conjunction with the Hotel Association of Canada and Tourism HR Canada.
 - Coordinate STEC services in support of transformational projects and defined destination areas, focusing on management, operational and volunteer training, mentorship and support.

El Salvador Temporary Foreign Worker Program, BC

The BC Restaurant and Food Services Association has recently launched a new temporary worker program to address growing labour shortages. By 2025, two in three workers will come from youth entering the labour force. The other third will require immigrant labour and to this end an agreement has been entered into with El Salvador to supply qualified and trained workers to immigrate and integrate into the industry. The workers are provided English language training and will be subject to all applicable provincial employment standards. It is expected many workers will eventually remain in the province and become Canadian citizens.

Strengthening enablers

Collaboration and networking

Given the diversity of stakeholders associated with the tourism industry and their many areas of mutual interest; the large number of small and dispersed business operators; and, the importance of empowering partners, there is a critical need to support and maintain all mechanisms that are likely to facilitate collaboration, networking and constructive dialogue. The success of this Strategy depends on a collaborative effort – no one organization can have sufficient impact to make a difference on their own. The importance of facilitating opportunities to work together has already been clearly identified – but its importance cannot be over-stated. It is key to the entire strategic framework and to achieving the vision of a *vibrant tourism industry offering year-round compelling and memorable Saskatchewan experiences* – one that will result in sustainable growth.

Maintaining a coherent and constructive conversation will be challenging. The mechanisms that have been identified in this Strategy (Actions 2 through to 5) will play a fundamental role in this process and will improve the take-up and follow through of development initiatives and integrated planning discussions at community, regional and provincial levels.

Supporting infrastructure and services

In developing a competitive destination with compelling experiences, there are a range of factors relating to supporting infrastructure and services that need to be considered. The following actions highlight key areas of considerations.

ACTIONS:

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

It is recognized that meeting all needs discussed in the planning process is an unrealistic target. Nevertheless, an awareness of these issues and an assessment of their impact on destination competitiveness are essential in assisting partners, particularly government ministries and agencies in identifying where they can make a positive impact through their own policies.

- Work with local governments and industry associations to identify infrastructure and service needs on a periodic but regular basis.
 - Develop criteria for prioritizing needs and related infrastructure projects. This has been done in the past in relation to highways – refresh this work and ensure that the assessment remains current. Undertake similar work in other areas.
 - Review the priorities in discussions with provincial partners and relevant stakeholders, and identify realistic targets.

- Report outcomes of government infrastructural projects to the wider tourism industry.

This may not have formed part of industry communications in the past, but it will reflect the more holistic and collaborative approach that is being recommended for the future. It will also highlight the mutual synergies between the agendas and operations of different agencies.

20. Work with partners to disseminate information on smart practice and non-traditional solutions where there is a case for transferable value.

This is particularly applicable to accommodation given the gaps in provision and the need for upgrades in many rural areas. Destinations elsewhere are making significant use of new non-fixed roof accommodation options such as luxury and innovative glamping structures or even ‘tree-hotels’. These are less capital-intensive and can add value to the experience – either as stand-alone products or extensions to existing resorts. The quality of the product and the associated service elements remain critical to its success.

- Focus dissemination of information and related discussions on addressing accommodation issues where new and innovative solutions are regarded as an appropriate option.

Strengthening enablers

Cooperative hotel concept

An innovative solution to addressing a gap in accommodation and developing a hotel has been successfully pursued in Carrot River. No one investor or hotel chain was interested in the opportunity to develop a 24-room facility, given the likely low return on investment. However, the community recognized that without such a facility, further development of tourism was going to be a challenge. In 2013 one hundred local investors came together to purchase shares and provide the capital required to develop the facility and a restaurant. An investors group has been established to oversee the operations of the \$2.4 million development and the Council provided tax breaks and incentives for its first three years. Challenges still remain, including maintaining the economic viability of the restaurant, but the model demonstrates some interesting lessons relating to non-traditional tourism development in rural communities within the province.

Albergo Diffuso concept

An alternative model is based on the concept of a “scattered hotel”. Originating in Italy, the concept is an innovative approach to providing hotel rooms and revitalizing smaller rural towns where attracting investment capital for hotel development was unrealistic. Empty rooms in vacant or under-used buildings within the town are repurposed as “hotel rooms” and decorated in a consistent and authentic local style. The rooms are scattered throughout different buildings but overseen by one manager. A traditional breakfast may be served at a local café or in a nearby home. Reception services for the visitor may be located in a shop or restaurant. The concept provides the accommodation that is needed to build a tourism economy while also allowing visitors to truly immerse themselves in local life. The Italian projects act as drivers of economic development and managers are encouraged to source all products and food from local producers.

21. Continue to work collaboratively to strengthen all aspects of transportation and access to and within the province.

- Ensure that the Regina Airport Authority and the Saskatoon Airport Authority are well supported in strategic initiatives to engage in discussions on developing new or maintaining existing international/US air routes.

Building new direct air routes into the US is particularly important to strengthening the US market. All discussions need to be fully supported by market research and proposed marketing initiatives that involve Tourism Saskatchewan, the city DMOs and economic development agencies.

- Undertake regular collaborative discussions with all partners to assess opportunities and appropriate ways of supporting Airport Authority initiatives, including opportunities to incentivize route development.
- Continue to work with ground transportation services and the private sector to address the need for commercial ground transportation:
 - From city centres to the two main airports respectively. Explore alternative models such as a partnership-based initiative with the hotel sector.



Strengthening enablers

- From taxi services – continue to pursue STEC’s focus on promoting training to this sector on quality customer care. This is often the visitor’s first point of contact with the province and the quality of experience needs to be strengthened and maintained on an ongoing basis.
- From the gateway cities to other key destinations within the province. The withdrawal of Greyhound services has left a serious gap, and new solutions need to be identified to address this gap, including ride-sharing services. The recent government approval of regulations that will govern ride-hailing companies represents the first step to promoting ride-sharing as a potential solution, although municipalities have responsibility for issuing and allocating licenses. Delivering consistent quality and ensuring safety will remain key considerations in rolling out a program.
- Maintain regular discussions with the Ministry of Highways and Infrastructure and local governments to review priorities and ways of enhancing the visitor’s travel experience within Saskatchewan. Topics that will need ongoing attention include:
 - Signage – this is always a topical issue. As an initial step, local government and industry partners can fulfil a key role at the local and regional level in assisting with an audit process.
 - The siting, development and servicing of rest areas, including prioritizing needs and identifying ways of attracting partners and incentivizing the clustering of new businesses in select areas, to create a model of retail and food & beverage activity similar to what can be found at Davidson.
 - The availability and the quality of public washrooms on major highway routes.
 - Timely availability of information services on driving conditions. Promoting the highway hotline and further developing online options will assist in meeting the driving needs of visitors.

22. Work with government partners and sector associations to strengthen the appeal of existing nature-based tourism assets by improving supporting policy and infrastructure.

- Work with the Ministry of Parks, Culture and Sport to develop a strategic plan for the ongoing management and delivery of the visitor experience within the provincial parks. Areas to consider include:
 - Identifying new visitor trends and expectations (such as the interests of Saskatchewan’s growing population of recent immigrants), and develop new experiences and activities that will cater to their needs and grow visitation.

Examples include:

- ❖ ‘Learn to fish’ and ‘learn to camp’ experiences;
- ❖ The development of new and readily accessible park accommodation facilities that are designed to reduce uncertainty and build confidence in the outdoors;
- ❖ The development of facilities designed to be used by larger family groups.
- Identifying infrastructural and amenity projects that will open up new areas within existing parks and recreation areas.
- Work with the Ministry of Parks, Culture and Sport, the Ministry of Environment and related sector associations to review policy and regulations associated with land and water-based assets in the context of the ongoing development of tourism. Areas to consider include:
 - Lakes, and in particular, Lake Diefenbaker, with an emphasis on developing a Lake Development Strategy that would provide guidelines for the development of lakes in general in terms of tourism. This will need to consider:
 - ❖ Shoreline development;
 - ❖ Management of water quality and conservation policies;

Strengthening enablers

- ❖ The need for new rental facilities, built amenities and new activity and tour opportunities on key lakes;
- ❖ Policies for improving the integration of existing higher or potential higher use areas and park locations with water-related management issues.
- The development of policies and procedures to improve working relations with existing resort communities in a way that will facilitate the development of stronger tourism settings.
- The development of a provincial trails strategy that would provide clarity over the existing systems. Attention needs to focus on:
 - ❖ Designating motorized, non-motorized and multiple-use trails and identifying policies for addressing user conflict.
 - ❖ Identifying infrastructure and amenity priorities.
 - ❖ Addressing related issues such as a registration system for ATVs

Driving growth – an integrated approach

Focusing on the core priorities collectively will strengthen the entire experiential framework – the brand, the experience elements, and ultimately the compelling experiences on offer to the visitors. This integrated and collaborative approach will be fundamental to achieving the vision – a vibrant tourism industry offering year-round compelling and memorable Saskatchewan experiences.

5. Measuring Change

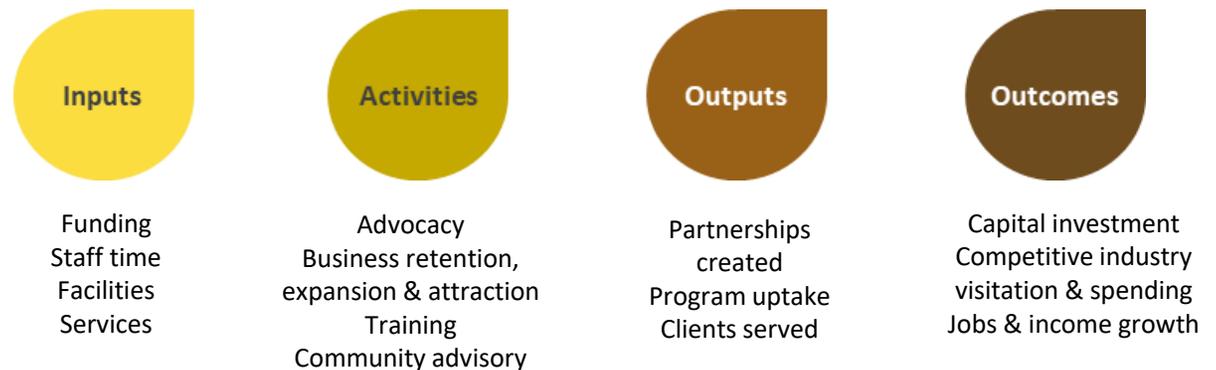
Performance measurement underpins the commitment to evidence-based decision-making. It is an essential step in the implementation of this Strategy and is enabled when the goals and objectives of the Strategy are incorporated into an assessment framework that demonstrates how actions will lead to results.

A systematic approach to performance measurement will help Tourism Saskatchewan and its partners better understand the linkages between the projects, programs and services being proposed and the ultimate goal of growing the tourism economy in the province. Performance measurement underpins the commitment to evidence-based decision-making by which resources can be optimally allocated to areas where they can be most effective, while maintaining implementation momentum. Likewise, it encourages the ongoing reassessment of all strategic and tactical initiatives by seeking out continuous improvement through the adoption of smart practices and, where needed, corrective action so the Strategy can stay on track and on target. It can also fulfill a very important role in advocacy efforts and building partnerships with government, industry and communities through the use of relevant and timely information that enriches the story about Saskatchewan's evolution as a compelling destination.

Framework

Performance management is enabled when the goals and objectives of the Strategy are incorporated into an assessment framework that demonstrates how actions will lead to results. As cause-effect linkages are crystallized, a common understanding emerges as to the scale and scope of resources required and how they are to be deployed at an operational level. The purpose of the framework is to show the underlying 'if – then' logical relationship between what is invested in the product development process and what is supposed to be achieved over time. The time dimension is important because intended outcomes do not necessarily occur immediately and may in fact take years to reach.

The figure below shows the relationship between inputs, activities, outputs and outcomes for the Strategy.



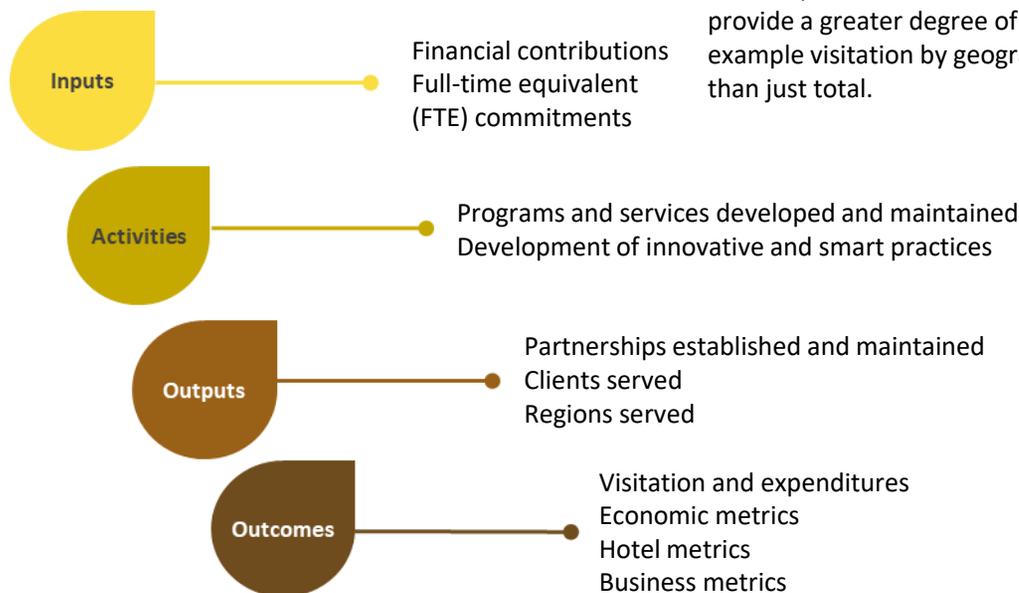
Measuring change

Measures and indicators should be selected to reflect major inputs, activities, outputs and outcomes, with an appropriate balance between efficiency in the data collection and reporting process and effectiveness in portraying change that matters to stakeholders.

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

While input, activity and output measures are important for measuring efficiency or the cost effectiveness of resources dedicated to the implementation of this strategy, they do not reflect the effectiveness of the delivery of desired outcomes. The former are measures of execution, the latter is a measure of change. Potential indicators are shown below.

Follow-up components including data sources, frequency and collection procedures should be prepared as the framework is operationalized. In addition, some measures could be expanded to provide a greater degree of granularity – for example visitation by geographic market rather than just total.



Reporting and communications

The 'performance management framework' can be used to conduct reporting and communications activities.

- **Internal reporting** – detailed reporting for internal Tourism Saskatchewan use, specifically in relation to annual action planning.
- **External reporting** – reporting of key indicators and measures in the Annual Report for release to government, stakeholders and the public.
- **Communications** – reporting of Strategy implementation progress, as well as broader tourism metrics, through websites, social media, digital media and conventional media.

Explicit recognition should be made for issues of **attribution** – in other words, how inputs and activities actually contributed to outcomes while recognizing the influence of exogenous variables such as taxation, trade, currency exchange rates and other external forces. Control over outcomes and claims to attribution are strongest in the short term but gradually diminish over time as other events drive change in the indicators being measured.

A preferred approach is to interpret change from a contributory perspective rather than implying it occurred solely because of the Strategy implementation. This will help build credibility in the reporting process with partners, stakeholders and the public.

6. Implementation

***Without strategy, execution is aimless.
Without execution, strategy is useless.***

Morris Chang

The benefits to be derived from tourism and the success of this Strategy will fully depend on a coordinated approach to implementation. It is a ‘road-map’ designed for all involved in developing a competitive and sustainable destination. Tourism Saskatchewan has a critical role to play as the ‘custodian’ of the Strategy and as key enabler of collaboration. Ultimately, however, success will depend on all stakeholders – industry, communities, government, and agencies alike – recognizing the value of working together to achieve the vision set up in this document.

The goal of strengthening the tourism economy and the competitiveness of the destination is a shared responsibility. No one player or stakeholder can achieve success single-handedly. It is ultimately a team effort.

The Implementation Plan on the following pages outlines the key stakeholders that are likely to be involved in the various initiatives. Tourism Saskatchewan has a lead facilitating role in all action areas, but will only be successful through the support of the various agencies and stakeholders that are identified.

This Implementation Plan should be regarded as a dynamic tool – one that is flexible to deal with change and the emergence of new tourism interests.

The Strategy is a ten-year Strategy, and factors and market trends influencing tourism in Saskatchewan will change. Accommodating and leveraging such change is vital, and implementation of the Strategy should be accompanied by regular review of progress and relevance of priorities. Not all initiatives may reach completion within the ten-year period, but the intent is that all should be well underway and that each should make a significant difference. Monitoring this impact and related outputs will ensure that investment of resources remains targeted on where strategies and activities are seen to be having a particularly positive return on investment.

Implementation – Empowering partners	Who Is Involved?	Timing	Expected Outcome
<p>1. Develop and promote a comprehensive understanding of the economic and cultural value of tourism</p> <ul style="list-style-type: none"> • Define the scope of an impact assessment model • Collate existing provincial and regional data • Establish relevant new performance measurement tools • Develop the impact assessment model 	<p>Saskatchewan Bureau of Statistics Parks, Culture and Sport</p>	<p>Short term Years 1-3</p>	<p>Impact assessment model Annual publication on the current value and impact of tourism</p>
<p>2. Highlight the government’s commitment to tourism</p> <ul style="list-style-type: none"> • Reword vision statement 	<p>Government of Saskatchewan Executive Council</p>	<p>Short term Years 1-3</p>	<p>Revised vision statement</p>
<p>3. Enhance opportunities for ongoing cross-ministry and government agency dialogue on tourism development</p> <ul style="list-style-type: none"> • Map all ministries, crown corporations and provincial agencies • Develop consensus on common priorities, activities and annual targets and establish relevant strategic agreements to work on these areas of shared interest • Include regular reporting on the implementation of this Strategy within the forum discussions • Use the Strategy to identify key areas of planning and policy consideration 	<p>Parks, Culture and Sport Trade & Export Development Highways & Infrastructure Environment Agriculture Creative Saskatchewan Sask Culture Heritage Saskatchewan</p>	<p>Short term Years 1-3</p>	<p>Ongoing strategic planning process</p>
<p>4. Strengthen linkages with industry, including opportunities for dialogue, communications and networking initiatives</p> <ul style="list-style-type: none"> • Further utilize the Tourism Saskatchewan Board of Directors to engage in dialogue on implementation and areas of policy development • Provide capacity for setting up temporary issue-specific working groups • Hold regular meetings with sector associations, CMOs and DMOs • Expand the Tourism Talks initiative • Investigate the feasibility of re-establishing Regional Boards 	<p>Tourism Saskatchewan Board of Directors Sector associations Destination Marketing Organizations (DMOs) Community Marketing Organizations (CMOs)</p>	<p>Short term Years 1-3</p>	<p>Ongoing advice on implementation and related policy Working groups Integrated linkages Strengthening of sectors</p>
<p>5. Support initiatives to strengthen Indigenous leadership within the tourism industry</p> <ul style="list-style-type: none"> • Work with ITAC to maintain the Regional Coordinator position • Support Indigenous initiatives designed to formally or informally encourage networking and dialogue within the sector 	<p>Indigenous Tourism Association of Canada (ITAC) First Nations councils & Indigenous communities</p>	<p>Short term Years 1-3</p>	<p>Strengthening of the Indigenous tourism sector Growth of Indigenous tourism products and businesses</p>

Implementation – Focusing on transformational projects	Who Is Involved?	Timing	Expected Outcome
<p>6. Identify at least one transformational project</p> <ul style="list-style-type: none"> Undertake a preliminary feasibility analysis Prepare a comprehensive development plan and a business plan for any selected project 	Industry Parks, Culture and Sport Trade & Export Development Highways & Infrastructure Environment Agriculture Creative Saskatchewan Sask Culture ITAC	Medium term Years 4-6	One or two transformational projects initiated – feasibility analysis and development plan completed

Implementation – Leveraging momentum	Who Is Involved?	Timing	Expected Outcome
<p>7. Prepare and maintain a list of destination areas ready for development projects</p> <ul style="list-style-type: none"> Establish clear criteria for what constitutes readiness Communicate readiness criteria and an accreditation pathway 	Destination Areas / DMOs Local government	Short term Years 1-3	Investment-ready Destination Areas
<p>8. Refresh existing and develop new planning resources for DMOs</p> <ul style="list-style-type: none"> Use the work on economic impact analysis of tourism to demonstrate the value of a cluster-based approach to product development Develop new tools and resources for capacity building Work with other ministries, agencies and service providers to assist DMOs 	Destination Areas / DMOs Local government Supporting agencies	Short term Years 1-3	Resilient, productive and sustainable network of destination marketing organizations
<p>9. Develop a pilot project approach to launching major new initiatives.</p> <p>Consider the following steps:</p> <ul style="list-style-type: none"> Host an annual competition for existing and potential destination areas Compile and promote a compendium of minimum requirements, smart practices, pre-feasibility assessments and demonstration projects Create a pilot project implementation network of government agencies Develop work plan templates that can be used to initiate and track pilot projects Establish an understanding of return on investment 	Industry Parks, Culture and Sport Trade & Export Development Highways & Infrastructure Environment Agriculture Creative Saskatchewan Sask Culture ITAC	Medium term Years 4-6	Pilot program and support network for implementing new initiatives

Implementation – Advancing experience development	Who Is Involved?	Timing	Expected Outcome
<p>10. Build a strong positioning narrative to animate the brand</p> <ul style="list-style-type: none"> Continue to work on the positioning narrative for the province as a whole with a focus on the four experience elements 	<p>Select partners (for testing the positioning narrative)</p>	<p>Short term Years 1-3</p>	<p>Integrated brand supporting market, product and destination planning</p>
<p>11. Begin a process of visitor experience development planning</p> <ul style="list-style-type: none"> Develop a regional experience development framework within a cluster-based destination area – create a regional narrative that supports the provincial narrative Use the planning process to identify infrastructural gaps and ways of addressing related issues 	<p>Industry Destination Areas / DMOs Local government Parks, Culture and Sport Highways & Infrastructure Creative Saskatchewan Heritage Saskatchewan</p>	<p>Short to Medium term Years 1-6</p>	<p>Cluster-based investment and development in at least one Destination Area</p>
<p>12. Identify Saskatchewan’s unique stories through a Story Project</p> <ul style="list-style-type: none"> Initiate a Story Project that entails collecting and composing historical, natural and economic snapshots or narratives Seek out early-stage partnerships Investigate how user-generated content (UGC) technology can play a role in making the Project relevant and accessible for all potential contributors Identify and roll out the Project in one or two pilot areas Promote uptake and use of story content to industry and operators Use the Project to support the narrative associated with transformational projects Explore the potential role of gaming technology as a content purveyor Develop an awareness program to support the Story Project 	<p>Industry Creative Saskatchewan Sask Culture ITAC Saskatchewan Heritage Foundation Historical societies and relevant community groups Educational institutions</p>	<p>Short to Medium term Years 1-6</p>	<p>Greater use of geological and historical heritage and culture stories in products and experiences</p>
<p>13. Restructure the AWeshop program to support implementation of visitor experience development plans</p> <ul style="list-style-type: none"> Restructure and reposition the program as a cluster support program and pilot it within a destination that has completed a visitor experience develop plan Develop a supporting program within Tourism Saskatchewan to assist in market testing emerging concepts 	<p>STEC</p>	<p>Short to Medium term Years 1-6</p>	<p>Targeted delivery of AWeshop resources to support clusters and pilots</p>

Implementation – Advancing experience development	Who Is Involved?	Timing	Expected Outcome
<p>14. Work with partners to establish a strategic high-level approach to developing cluster-based experiences that will highlight the four experience elements</p> <ul style="list-style-type: none"> Consult with industry champions possessing field-proven knowledge and pursue ongoing discussions to identify strategic development priorities Develop a series of short working plans based on the following opportunity areas 	Industry Destination Areas / DMOs CMOs Local government	Medium term Years 4-6	Industry consultation and working plans for experience themes
<p>LIFE IN THE NORTH</p> <ul style="list-style-type: none"> Identify and map existing and potential activities and experiences Work with local business operators to determine how existing experiences could be further enriched with new activities and identify key constraints <p>Airship Tours</p> <ul style="list-style-type: none"> Leverage the discussions that are currently underway on looking at the opportunity hybrid airships offer on accessing the north Give consideration to support services and related infrastructure 	Saskatchewan Commission of Professional Outfitters Creative Saskatchewan Sask Culture Industry Destination Areas / DMOs CMOs Local government Internal airlines	Short term Years 1-3 Long term Years 7-10	New or enhanced market and export-ready products and experiences
<p>WINTER IN SASKATCHEWAN</p> <p>Snowmobiling</p> <ul style="list-style-type: none"> Identify areas with the strongest potential to develop a compelling experience Work with businesses and local and regional agencies to identify ways of growing the spectrum of supporting businesses Identify accommodation requirements to complement what already exists Assess opportunities to add value to the trail riding experience <p>Winter Eco-tourism</p> <ul style="list-style-type: none"> Select a pilot destination area Assess accommodation requirements Develop complementary activities <p>Winter Cultural Festivals</p> <ul style="list-style-type: none"> Develop an inventory of existing winter cultural events Identify events with the potential to expand and strengthen, including the addition of incremental activities 	Saskatchewan Snowmobile Association Creative Saskatchewan Sask Culture Industry Destination Areas / DMOs CMOs Local government	Short term Years 1-3 Medium term Years 4-6 Short to Medium term Years 1-6	New or enhanced market and export-ready products and experiences

Implementation – Advancing experience development	Who Is Involved?	Timing	Expected Outcome
<p>FOOD AND FARMING</p> <p>Farm tourism</p> <ul style="list-style-type: none"> • Develop inventory of existing farm experiences and community related events • Include Ministry of Agriculture regional staff in the destination area pilot visitor experience development planning processes • Review Agribition, Ag in Motion and the Farm Progress Show 	<p>DMOs and CMOs Agriculture</p>	<p>Short term Years 1-3</p>	<p>New or enhanced market and export-ready products and experiences</p>
<p>Culinary tourism</p> <ul style="list-style-type: none"> • Develop an inventory of all culinary events and assess their strengths • Involve partners that can review implications of health and safety legislation • Encourage the culinary sector to build strong internal linkages within the supply chain • Continue to use culinary tourism to support the development of Saskatoon and Regina as destinations 	<p>Tourism Saskatoon Tourism Regina Sector Associations</p>	<p>Short to Medium term Years 1-6</p>	
<p>INDIGENOUS TOURISM</p> <ul style="list-style-type: none"> • Utilize the resources that already exist within ITAC and other organizations to help Saskatchewan product and destination development prosper • Work with ITAC to help establish an Indigenous Tourism Association • Grow the number of experiences to market in areas of potential strength <p>Indigenous Culinary Experiences</p> <ul style="list-style-type: none"> • Assist Indigenous stakeholders develop culinary experiences as stand-alone activities <p>Wanuskewin Heritage Park</p> <ul style="list-style-type: none"> • Consider selecting Wanuskewin as a destination area for a pilot visitor experience development plan 	<p>ITAC Indigenous communities and First Nations councils Wanuskewin Heritage Park Authority</p>	<p>Short term Years 1-3</p>	<p>New or enhanced market and export-ready products and experiences</p>
<p>CREATIVE AND CULTURAL HERITAGE SECTOR</p> <ul style="list-style-type: none"> • Work collaboratively to develop an authentic ‘cowboy and western’ experience: • Work with the visual and performing arts sector to identify new approaches to highlighting the work of Saskatchewan artists to the visitor 	<p>Creative Saskatchewan Sask Culture Heritage Saskatchewan</p>	<p>Medium term Years 4-6</p>	<p>New or enhanced market and export-ready products and experiences</p>

Implementation – strengthening enablers	Who Is Involved?	Timing	Expected Outcome
<p>15. Develop a strong business development program</p> <ul style="list-style-type: none"> • Develop a suite of diagnostic and planning tools • Work through existing tourism, economic and community development agencies and programs to scope, scale and deliver the toolkits • Investigate a tourism incubator as a successor program to the toolkit initiative • Work with ITAC and First Nations partners to customize the toolkit and incubator services 	<p>Export & Trade Development Educational Institutions Destination Areas ITAC Saskatchewan Economic Development Association STEC Community Futures Square One</p>	<p>Medium term Years 4-6</p>	<p>Toolkits and an incubator for enhancing the creation and competitiveness of tourism businesses</p>
<p>16. Work collaboratively to develop and implement an investment attraction strategy</p> <ul style="list-style-type: none"> • Develop a risk-return rationale and a foundational message • Leverage government programs to support projects that encourage or facilitate product development • Identify provincial infrastructure and assets that can be leveraged for investment attraction • Develop an investor outreach program 	<p>Trade & Export Development</p>	<p>Short term Years 1-3</p>	<p>Increased tourism investment and foreign direct investment Coordination between tourism and compatible investment initiatives</p>
<p>17. Build a business case for the establishment of a new tourism development fund</p> <ul style="list-style-type: none"> • Identify the key objectives of a selective capital grants scheme • Determine criteria and related preferences and use the program to facilitate development 	<p>Executive Council Western Economic Diversification</p>	<p>Medium term Years 4-6</p>	<p>Dedicated tourism fund and enhanced access to capital by industry that supports the implementation of the Strategy</p>
<p>18. Work with partners to address tourism labour demand growth projections</p> <ul style="list-style-type: none"> • Continue to implement the Tourism Saskatchewan labour strategy • Strengthen the dialogue between the Saskatchewan Tourism Education Council (STEC), educational institutions and industry • Work with partners and the Ministry of Advanced Education to reassess certification processes • Review STEC’s programs within the context of this strategy 	<p>Saskatchewan Tourism Education Council Saskatchewan Apprenticeship & Trade Certification Commission Advanced Education Immigration & Career Training Educational Institutions</p>	<p>Short term Years 1-3 and ongoing</p>	<p>Balanced tourism labour market</p>

Implementation – Strengthening enablers	Who Is Involved?	Timing	Expected Outcome
<p>19. Develop procedures for the identification and mapping of needs for new or improved infrastructure and visitor services</p> <ul style="list-style-type: none"> • Work with local governments and industry to identify infrastructure and service needs • Report outcomes of government infrastructural projects to the tourism industry 	<p>Industry Local government Destination Areas Parks, Culture and Sport Highways & Infrastructure</p>	<p>Short term Years 1-3</p>	<p>Strategic investments in economic infrastructure in support of tourism</p>
<p>20. Work with partners to disseminate information on smart practice and non-traditional solutions</p> <ul style="list-style-type: none"> • Focus on addressing accommodation issues where appropriate 	<p>Destination Management Areas Local government Industry Saskatchewan Hotel and Hospitality Association</p>	<p>Short term Years 1-3</p>	<p>One or more luxury/ iconic accommodation investments</p>
<p>21. Continue to work collaboratively to strengthen all aspects of transportation and access to and within the province</p> <ul style="list-style-type: none"> • Ensure that the Regina Airport Authority and the Saskatoon Airport Authority are well supported in strategic initiatives • Continue to work with ground transportation services and the private sector • Maintain regular discussions with the Ministry of Highways and Infrastructure and local governments to review priorities and ways of enhancing the visitor experience 	<p>Airport authorities Highways & Infrastructure Service providers</p>	<p>Short term Years 1-3</p>	<p>Improved, affordable transportation access to and within the province</p>
<p>22. Work with government partners and sector associations to strengthen the appeal of existing nature-based tourism assets</p> <ul style="list-style-type: none"> • Work with the Ministry of Parks, Culture and Sport to develop a strategic plan for the ongoing management and delivery of the visitor experience within provincial parks • Work with the Ministry of Parks, Culture and Sport, the Ministry of Environment and related sector associations to review policy and regulations associated with land and water-based assets 	<p>Parks, Culture and Sport Environment Destination Areas Resort areas Local government</p>	<p>Medium term Years 4-6</p>	<p>Streamlined land and resource regulatory process Enhanced destination status for provincial parks Resource management development strategies – lakes, trails</p>

