

2012

**TOURISM
RESEARCH PLAN**



INTRODUCTION

Tourism Winnipeg is Winnipeg's official destination marketing organization. Its mandate is to facilitate a healthy, prosperous, responsible and fully-integrated tourism industry which enhances the city of Winnipeg's economic growth, increases visitation and delivers the best possible visitor experience.

Tourism Winnipeg leads Winnipeg's destination sales and marketing efforts, conducts tourism research, functions as the industry's advocate and liaison, creates partnership opportunities, collaborates with industry, leverages travel media, leads city bids and proposals and provides visitor information.

Tourism is a valuable economic driver for Winnipeg generating an estimated \$480 million in direct visitor expenditures through 2.8 million person-visits annually and supports over 12,000 tourism employment positions.

The activities documented in this research plan are intended to support the objectives of the local tourism sector, contribute to the effective implementation of Tourism Winnipeg's Master Tourism Plan as well as to provide intelligence to increase meetings, conventions, sports and special events and leisure visitation.

RESEARCH PROGRAM OBJECTIVES

The focus of Tourism Winnipeg's research efforts is to provide valuable industry and market intelligence to support internal marketing and strategic plans. The broad objectives of this research plan for 2012 and beyond include:

Produce accurate, informative and relevant tourism indicators and performance measures.

Leverage local and regional partnerships to enable better monitoring of local tourism trends affecting Winnipeg.

Align Winnipeg's tourism indicators and performance measures with the province as reported by Travel Manitoba.

Enhance and expand available tourism data to better support Winnipeg's tourism development and marketing efforts.

Communicate tourism sector information and intelligence for the benefit of the city's tourism sector and the consumer.



RESEARCH PROGRAM

Tourism Winnipeg maintains a relationship with various organizations including Travel Manitoba, the Conference Board of Canada, Statistics Canada, Travel Tourism Research Association and other destination marketing organizations to effectively manage its information database of tourism indicators and industry trends.

Tourism Winnipeg actively collects a range of performance measures to monitor the progress of its sales and marketing efforts and demand for tourism information and services. Provided below is an overview of the external and internal sourced indicators and performance measures which form the basis of the research intelligence utilized and reported by Tourism Winnipeg. Also provided is a description of Tourism Winnipeg's professional research services and reporting methods.



Leisure and Business Travel

Tourism Winnipeg is a member of the "Cities Project Partnership" comprised of ten destination marketing organizations (DMOs) across Canada. The partnership was formed to obtain estimates of tourism volume, value and characteristics from the major consumer travel surveys conducted by Statistics Canada; these surveys include the Travel Survey of Residents of Canada (TSRC) and the International Travel Survey (ITS). The TSRC focuses on the travel characteristics of Canadian's traveling in Canada where as the ITS is geared toward U.S. and overseas travellers visiting Canada. The raw data produced from these two surveys is provided to Research Resolutions and Consulting Ltd. by the partnership to undertake a customized analysis and to produce tabulations of the travel data each member requires. The data acquired through this project serves as the basis for the person-visits and expenditure data utilized and reported by Tourism Winnipeg in its annual visitor profiles.



Tourism Winnipeg subscribes to Statistics Canada's Provincial Cross-Border statistics publication. This publication provides an account of the passenger vehicle traffic entering Canada from the United States by province of entry. Vehicle entries are categorized as either same day or overnight, are separated by U.S. residents and Canadian re-entries and reported monthly.

The Winnipeg Airports Authority provides Tourism Winnipeg with monthly passenger volume data by market area. Winnipeg's airport passenger traffic performance is monitored and reported monthly and includes a comparison with airport terminals across Canada; airport terminals include those in Montreal, Ottawa, Toronto, Calgary, Vancouver and Victoria.

Through its corporate membership with the Canadian Tourism Research Institute, a division of the Conference Board of Canada, Tourism Winnipeg accesses several pieces of industry intelligence; available publications include:

- » Airline seat capacity reports at the national and provincial level
 - » Consumer and business traveller confidence index
 - » Travel Market Outlook reports at the national, provincial and city level
 - » Domestic and international market update reporting
 - » Travel price index
 - » Provincial tourism snapshot
 - » Travel Exclusive newsletter of travel trends
 - » Tourism sector performance monitor for Canadian cities (New)
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Tourism Winnipeg references publications produced by the Canadian Tourism Commission providing a wealth of intelligence on global industry trends within specific market areas by geographic regions. These publications are sourced for the development of Tourism Winnipeg's industry trend bulletins.

Tourism Winnipeg monitors local hotel market performance using statistics compiled by Pannell Kerr and Forster Consulting Ltd. as published in their National Market Report. The performance measures include average occupancy rate, average room rate and revenue per available room.

Tourism Winnipeg references reports and market data from various independent sources including the Travel Tourism Research Association, Destination Marketing Association International, Meetings Canada and other industry research consultants in the development of its industry trend bulletins.

Tourism Winnipeg tracks all public information inquiries for travel information. Winnipeg visitor information inquiries are categorized and reported monthly by the method of contact and the tourism advertising source(s) recalled.

Tourism Winnipeg maintains a record of tourism promotional material requests and the volume of material distributed each month. Both hard copy and electronic versions of promotional materials are tracked. Monthly results are reported internally.



Meetings and Conventions

Tourism Winnipeg maintains a record of meeting and convention events taking place in Winnipeg. The information which comprises this performance measure includes the number of meetings and conventions, delegate attendance, number of room nights used and the estimated economic impact resulting from delegate spending. The data is reported monthly both internally and to key partners.

Tourism Winnipeg conducts an annual survey of meeting and convention planners who host an event in Winnipeg. A statistical analysis of the responses is performed internally and the results reported.

Tourism Winnipeg monitors its meeting and convention sales activities monthly. Data collected includes new sales leads, the number of sales and/or servicing calls made, proposals and bids prepared, business converted and conventions awarded to Winnipeg. This performance measure is reported internally on a monthly basis.



Sports and Special Events

Tourism Winnipeg tracks its sales activity relative to sports and special events held in Winnipeg. This information includes new sales leads, the number of sales and/or servicing calls completed, proposals and bids prepared, special event tourism applications submitted, sales conversions and events awarded to Winnipeg. This performance measure is reported internally on a monthly basis.

Communication

Tourism Winnipeg strives to provide the local tourism industry with pertinent information on local, national and international industry trends.

Annually, Tourism Winnipeg produces a market analysis report to illustrate the value of Winnipeg's tourism sector and provide relevant market intelligence. The final report is publicly available via Tourism Winnipeg's website.

Tourism Winnipeg produces detailed data tables of Winnipeg visitors categorized by duration of stay (same-day, overnight, total). Profile data includes person-visits and expenditures by geographic region, primary travel purpose and trip activities. Tourism Winnipeg publishes these indicators through its website.

Tourism Winnipeg produces an industry news bulletin known as the Winnipeg Barometer Report to communicate relevant local, national and international economic and tourism sector trends to its partners and other interested parties. The publication is made available through Tourism Winnipeg's website.

On a daily basis Tourism Winnipeg's research department addresses a variety of information requests from local partners, businesses, consultants and the general public as required.

Professional Services

Tourism Winnipeg along with its parent organization Economic Development Winnipeg Inc. provides professional research services to the local industry in the implementation of visitor surveys and/or tourism economic impact assessments.

Tourism Winnipeg provides client and consulting services to members of the local tourism sector relating to the preparation of survey forms and their deployment.

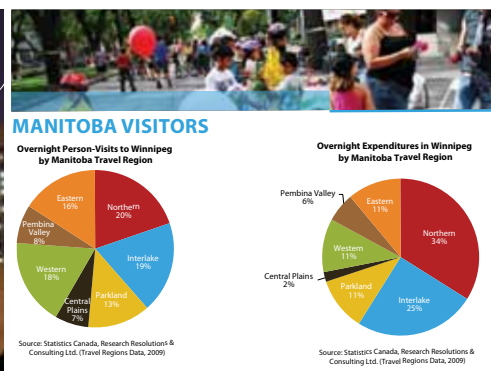
Through its parent organization, Economic Development Winnipeg Inc., Tourism Winnipeg has the resources to complete a tourism based economic impact assessment for local events and attractions. The process considers the total in-province direct expenditures attributed to activity under assessment and the resulting spin-off effect which is calculated utilizing the Tourism Economic Assessment Model (TEAM). Developed by the Canadian Tourism Research Institute, a division of the Conference Board of Canada, the TEAM has become the standard in Canada for conducting tourism based economic impact assessments. Economic Development Winnipeg Inc. retains a version of the model specifically designed to calculate the economic impact of tourism activities within Winnipeg.

To support its role in managing the Special Event Tourism Fund for the City of Winnipeg, Tourism Winnipeg initiates through Economic Development Winnipeg Inc. an economic impact assessment of meetings and conventions, professional and/or amateur sport events, cultural and entertainment events held in Winnipeg.

Internal Initiative

Through its membership with the Destination Marketing Association of Canada (DMAC), Tourism Winnipeg is a paying participant in the DMAC Best Practices Benchmark Study conducted each year by InterVISTAS Consulting Group. The study produces a final report which provides feedback to the organization on the effectiveness of its spending practices and various performance benchmarks which enable Tourism Winnipeg to evaluate its progress relative to other Canadian destination marketing organizations.

2.6 million person-visits	Total visitor expenditures \$481 million
Person-visits by region of origin	Person-visits by trip purpose
Manitoba 1,963,000	Leisure 2,075,000



2012 RESEARCH ACTIVITIES

Tourism Winnipeg plans to build upon its existing research program with the intent to expand information collection to improve available industry intelligence. Research activities in 2012 and beyond include:

Development of a pre-visit web survey on Tourism Winnipeg’s website. The survey will collect demographic information on website visitors, their purpose for visiting the site, plans for traveling to Winnipeg and setup contacts for a future conversion survey. Results from the survey will be analyzed and reported.

Redesign of Tourism Winnipeg’s meeting planner survey.

Research unsuccessful meeting and convention host bids through a survey to gain insight into Winnipeg’s unsuccessful bid applications.

Development and implementation of a meetings and convention booking forecast report.

Development and implementation of a sports event organizers survey. Two separate surveys will be developed with a focus on amateur and professional sport events.

Define the special events travel market and implement a survey of special event organizers.

Develop and implement a business traveller survey using sampling through hotels.

Initiate surveys of FAM tour participants.

Undertake a comprehensive review of supplementary intelligence reports being utilized by other destination marketing organizations to broaden Tourism Winnipeg’s intelligence in growing tourism visitation.

Review and refine economic impact calculations for market specific tourism indicators in Winnipeg.

RESEARCH PROGRAM SUMMARY

The following tables provide an overview and the scheduling of research activities planned for 2012.

Tourism Indicators and Trends	2012 Q1	2012 Q2	2012 Q3	2012 Q4	Result
Airport Passenger Volume	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Monthly indicator reporting
Hotel Occupancy, Room Rate, REVPAR	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Manitoba Cross-Border Traffic Volume	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Tourism Information Inquiries	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Tourism Material Distribution	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
M&C Event Tracking	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
M&C Event Sales	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Sports & Special Event Sales	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Tourism Winnipeg Website Performance	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Winnipeg Visitor Profile		Apr			Annual visitor market analysis report
Winnipeg Visitor Profile Statistics		Apr			Annual Winnipeg visitor profile tables
Winnipeg Barometer Report		May		Nov	Biannual industry trends bulletin

Tourism Surveys	2012 Q1	2012 Q2	2012 Q3	2012 Q4	Result
M&C Booking Forecast Report	Feb				Forecast report development
2012 M&C Meeting Planners Survey	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Response analysis and reporting
Tourism Winnipeg Website Survey	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Sports Event Organizer Survey	-	Apr-Jun	Jul-Sep	Oct-Nov	
Special Event Organizer Survey	-	-	-	-	
Business Traveller Survey	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
FAM Tour Participant Survey	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Trade Show Survey	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	