

EVALUATING THE TOURISM POTENTIAL OF MANITOBA'S PROVINCIAL PARKS



Executive summary of a full report commissioned by Travel Manitoba. Report conducted by MNP, Prairie Research & Associates (PRA) and HTFC Planning and Design.

An aerial photograph showing a dense forest of evergreen and deciduous trees along a shoreline. The water in the foreground is a deep teal color. The forest extends from the bottom right towards the top left.

▼ Clearwater Provincial Park

A visit to Manitoba means travelling through Treaty 1, 2, 3, 4 and 5 Territories and through communities who are signatories to Treaties 6 and 10. Manitoba is located on the ancestral land of the Anishinaabeg, Anishinewuk, Dakota Oyate, Denesuline and Nehethowuk Nations and is the Homeland of the Red River Métis. Northern Manitoba includes lands that were and are the ancestral lands of the Inuit.

Travel Manitoba respects the spirit and intent of Treaties and Treaty Making and remains committed to working in partnership with First Nations, Inuit and Métis people in the spirit of truth, reconciliation and collaboration.

↓ Spruce Woods Provincial Park



MANITOBA'S PROVINCIAL PARKS

Manitoba's spectacular wilderness is preserved and enjoyed thanks to 92 provincial parks, 15 provincial forests and two national parks. Throughout the COVID-19 pandemic, provincial parks played a key role in our lives as a safe place to escape, for recreation and to connect with nature. Parks offer a full range of activities in the great outdoors. Hiking, swimming, canoeing and skiing are all part of a healthier life. Manitoba's parks contribute not only to our quality of life, but also to the attractiveness of our province as a place to visit.

Tourism plays a key role in our province's economic recovery from the pandemic, while at the same time, has the ability to positively transform our communities and enrich the lives of both residents and visitors. Tourism creates sustainable jobs and lays the foundation for broader economic development initiatives such as infrastructure investment. Manitoba Parks and the extraordinary natural resources within them are an important part of positioning Manitoba as a premier travel destination. Many tourists are seeking nature-based experiences as the key attraction for their visit.

In 2021, Travel Manitoba collaborated with the Manitoba Chambers of Commerce and the Manitoba government on an updated Manitoba Tourism Strategy to support pandemic recovery and bring the tourism industry to the next level of development and growth. The ambitious strategy targets growth to \$2.5 billion in visitor spending by 2030, equating to 50 per cent growth over 2019 levels. Manitoba's national and provincial parks are major demand generators for tourism, and improving the visitor experience in provincial parks is a key initiative.

Included in the Manitoba Tourism Strategy are ideas on improving the visitor experience in our parks, such as:

- Sensitive and sustainable tourism development in Manitoba's provincial and national parks year-round;
- Expansion of park operating seasons;
- Expansion of parks facilities and amenities; and
- The addition of new experiences and attractions including unique winter, Indigenous, Francophone and water-based experiences.

MANITOBA PARKS HAVE A SIGNIFICANT IMPACT ON TOURISM

Manitoba Parks host more than half a million visitors per year (including cottagers) making provincial parks the largest "innkeeper" in the province. Within Manitoba Parks, there are more than 6,000 cottages, 6,100 campsites, 186 commercial operators that provide services to visitors and 42 special consideration organizations that are providing services such as youth camps, churches, RCMP, fire departments and utility companies.

Of Manitoba's 92 provincial parks, many are remote and not easily accessible to visitors. There are 76 parks operational at some level with developed infrastructure. However, most of the activity is confined to a smaller number of parks around the province.

The provincial parks system is very complex and visitor expectations are high. Improvements will be required to meet growing tourism demand such as wayfinding, access, amenities and accommodations. To effectively sustain and grow a healthy tourism sector into the future, Manitoba Parks will need to modernize operations and improve its financial sustainability.

A photograph showing a person from behind, wearing dark clothing and a grey knit hat, cross-country skiing on a snow-covered path. They are using ski poles. In front of them, another skier in dark clothing and a red hat is visible. The path is surrounded by tall evergreen trees, some with snow on their branches. The scene is bright, suggesting a sunny day.

↓ Whiteshell Provincial Park

EVALUATING THE TOURISM POTENTIAL OF MANITOBA'S PROVINCIAL PARKS – STUDY COMPONENTS

In partnership with Manitoba Parks, Travel Manitoba retained MNP and a team of specialists to explore the potential for enhanced tourism in Manitoba Parks and the associated impact on the visitor economy. The study objectives focused on how to improve the visitor experience to increase visitor spending as well as how to increase the perceived value of parks to visitors, residents and investors. The study included the following five components:

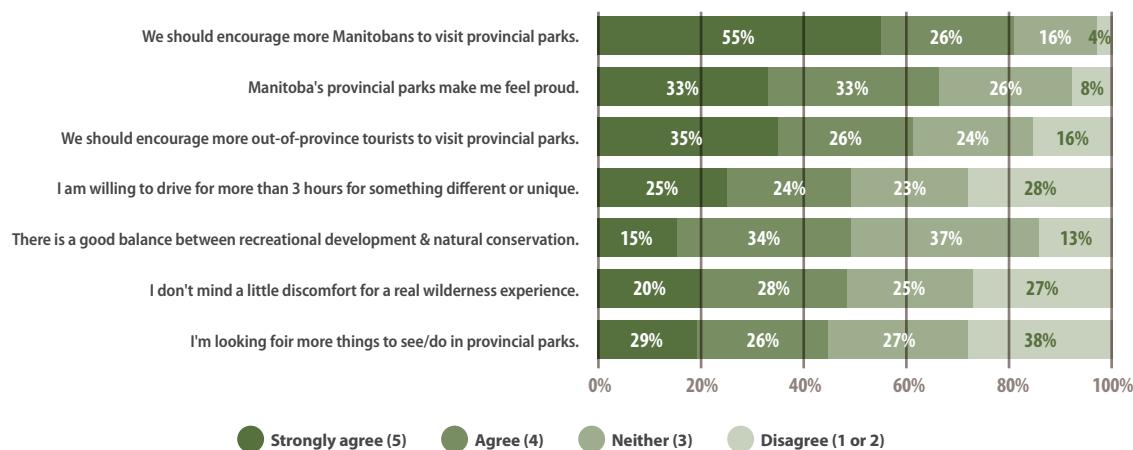
- Several surveys of Manitobans and provincial park users were conducted to get a fulsome picture of strengths, weaknesses, opportunities and threats facing parks;
- An analysis of best practises in other jurisdictions to identify unique product offerings, operational models and financial structures;
- An extensive physical evaluation of parks to understand the state of infrastructure and potential development needs;
- The identification of the top 15 parks that could best contribute to increased visitation, tourist attraction and improved financial sustainability; and
- Considerations that could be used to develop a new operational model.

MNP led the project in collaboration with Prairie Research & Associates (PRA) and HTFC Planning and Design. All data cited in this summary are a result of this project.

SURVEY HIGHLIGHTS

Attitudes about Using Parks

In general, Manitobans want more opportunities to use parks. Most Manitobans (81 per cent) agree or strongly agree that more should be done to encourage Manitobans to visit provincial parks. Most agree that more out-of-province tourists should be encouraged to visit provincial parks (61 per cent). For some, the distance to parks is a barrier, while many other Manitobans are willing to drive for more than three hours for something unique and different (49 per cent). Generally, Manitobans agree that provincial parks make them feel proud (66 per cent).

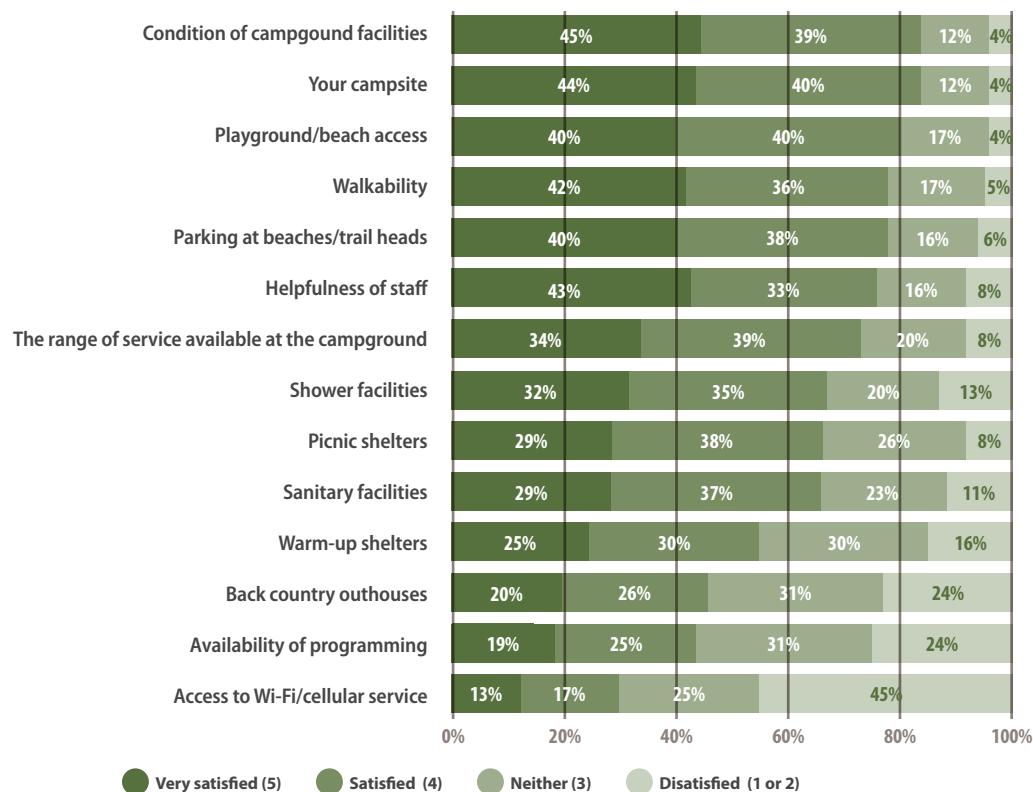


Campground User Satisfaction

Campground users are an important user group who know the parks well and are often heavy users of parks. Eighty nine per cent of campers are satisfied or very satisfied and 79 per cent reported that the camping experience was good value or excellent value.

However, 46 per cent of campground reservation system users were dissatisfied with the system on opening day. Only 29 per cent were satisfied, likely because they were able to secure their preferred site.

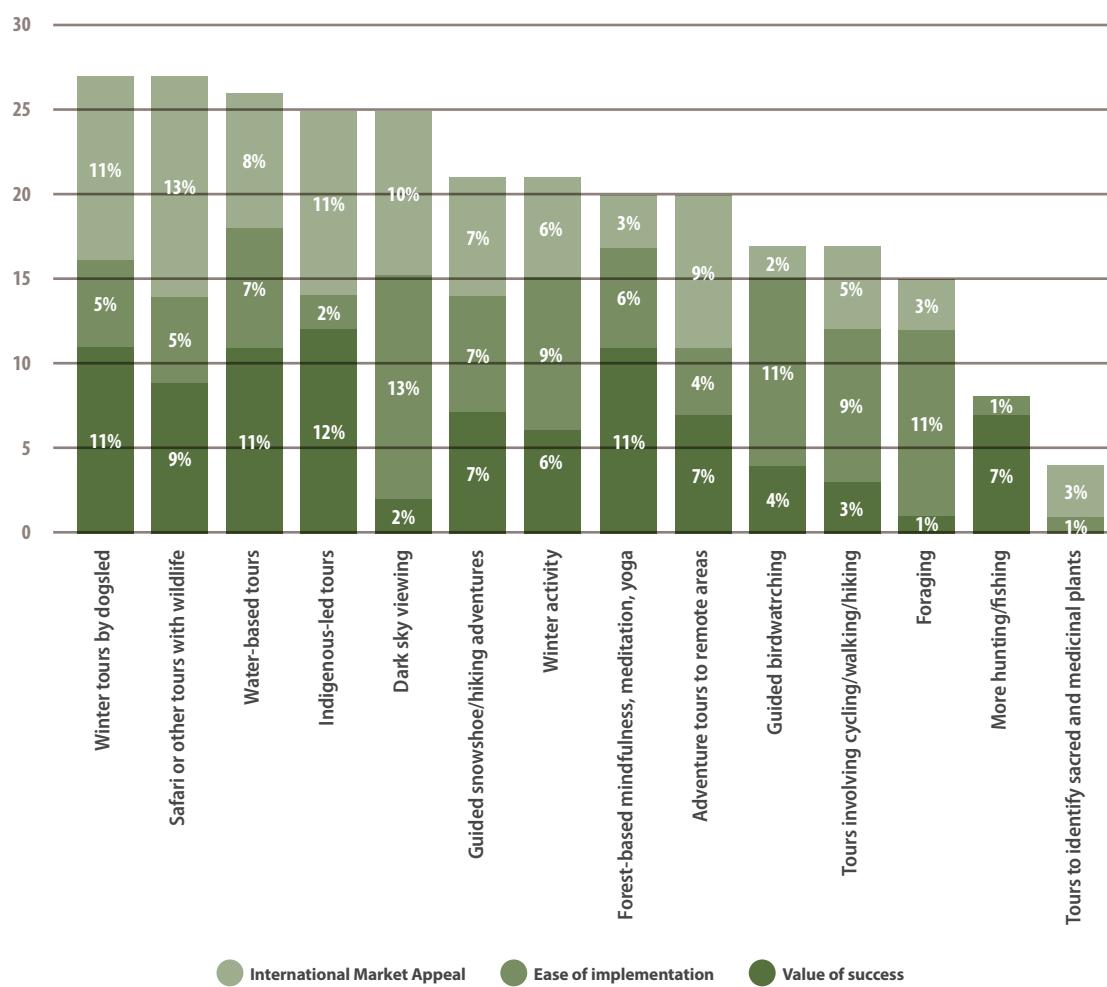
A clear gap exists between the type of campsites visitors prefer and the type of campsite they are typically able to reserve. Demand far outstrips supply for yurts, full service and electric/water campsites. Thirty seven per cent also reported that they are not able to secure a site at their preferred campground. Forty five per cent of campers are dissatisfied with access to Wi-Fi and/or cellular service and 24 per cent with availability of programming.



Top Nature-Based Tours

Manitobans were asked to identify tours and nature-based experiences that would increase visitation to parks. Each opportunity was rated according to International Market Appeal, Ease of Implementation and Value of Success.

Winter tours by dogsled received the highest ranking in the analysis. Such tours are expected to generate high net revenues as many tourists and domestic visitors would be interested in the experience. The cost of implementation was seen to be moderate, meaning this opportunity can be implemented with minimal difficulty. Safari and other wildlife tours, water-based tours, Indigenous-led tours and dark sky viewing rounded out the top five.



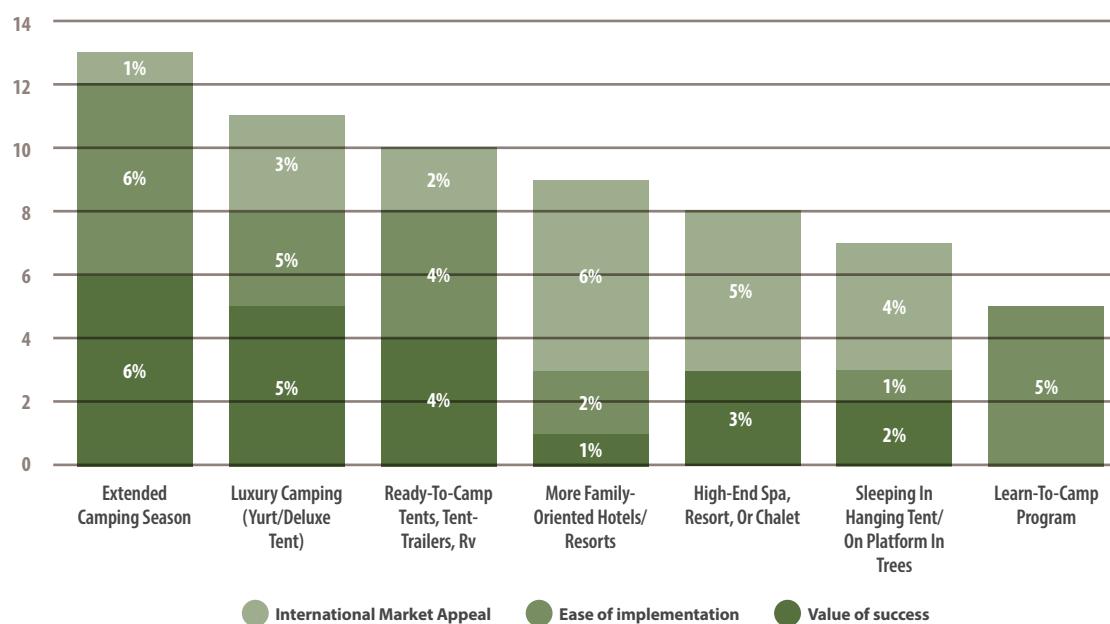
Top Potential Activities and Site-Based Experiences

The same approach of one-to-one comparison was completed for a slate of potential activities. Offering equipment rentals received the highest overall ranking, followed closely by increasing the number of long journey walking trails. Aerial activities like ziplining, yoga fitness programs, and kite boarding or snow-kiting were other top-rated activities. This ranking differs from the survey results as the ranking system considers the economic impact of the activities, not just interest levels.



Top Potential Accommodation Options

Extending the camping season was the top accommodation option in the analysis. Luxury camping was the next highest-rated experience, followed by ready-to-camp tents, tent trailers and RVs, and increasing family-oriented hotels/resorts.





STUDY RECOMMENDATIONS

1. Ensure spaces are inclusive and welcoming for all

As provincial parks are one of the most beloved, well-used and accessible provincial assets, maintaining equitable access is important. This needs to be balanced against the financial realities of recovering enough costs to make their ongoing operation sustainable. Elements like improved access for visitors with disabilities and providing equipment where possible for those that need it would provide greater equity to visitors to provincial parks.

There is a need and opportunity to diversify Manitoba Parks' customer base as the average age of park visitors increases over time. One way to attract the next generation of park visitors and campers is to offer a "learn-to-camp program" which will teach new Canadians and young families how to camp and connect with nature. Providing opportunities for businesses to rent a wider variety of equipment will help to attract a broader set of individuals to parks.

The study highlights the growing demand for camping and increased usage of RVs and that visitors are willing to camp earlier in spring and later into fall. There is market demand for an extended camping season.

Throughout the Manitoba Parks system, access to at least some of the backcountry should be managed through the development of both canoe and hiking routes that can be booked through the online reservation system. By managing access to the backcountry, Manitoba Parks can ensure sustainable long-term use of these natural assets that generate revenues to cover operation, maintenance and compliance costs. Once access to the backcountry is managed in a sustainable way, Manitoba Parks will be able to encourage commercial tour operators to deliver world-class guided experiences into some of the best paddling and hiking destinations in the world.

2. Bring provincial parks up to today's standard

For parks to play a meaningful role in the tourism industry, significant improvements are needed in many areas such as wayfinding signage, modern washrooms and shower facilities and the expansion of amenities such as electrical outlets in campgrounds.

Manitobans and visitors alike want access to Wi-Fi and modern interactive interpretive features. While some visitors are seeking remote or wilderness parks that are rustic, Manitoba does need to be competitive in providing amenities comparable to other provinces in general.

Difficulty in accessing accommodations in provincial parks is a barrier to growth. The current options require substantial preplanning and knowledge of the system to secure a campsite or comfort camping unit for peak periods such as long weekends.

Issues like wastewater lagoon capacity further limit increased visitation. Some parks struggle to manage seasonal demands on wastewater treatment through park-managed lagoons.

Commercial operators have indicated that housing for staff is a limiting factor in their ability to expand, or in some cases maintain, their current operations. This is especially pronounced in highly developed parks like the southern Whiteshell.

A crucial first step in understanding which parks can accommodate increased visitation and new activities is updating individual park management plans to reflect current growth objectives and to respond to changes in how visitors use and want to use parks. Planning should occur at regular intervals to ensure that management plans consistently represent the current situation in parks and can act as useful guiding documents to support decision-making.

A major trend across the country is the demand for comfort camping or “glamping” options such as yurts, fixed-roof accommodations and wall-tents. Manitoba now offers 112 yurts and 34 cabins for nightly booking; these accommodations are among the most popular options when the reservation system opens each year. Ontario, Saskatchewan and Parks Canada have all put a major effort into the design and servicing of their own unique comfort camping experiences.

To increase visitation and associated revenue, the provincial parks system needs to increase the number of accommodation units, revenue per unit or reservation fees and the quality of experiences surrounding camping to encourage deeper market penetration. The study highlights that there is currently more customer demand than the current availability of accommodations in provincial parks.

Provincial parks departments are also developing unique new offerings to attract visitors, with Québec and Ontario leading the country in providing unique day-use opportunities like ziplining and treetop trekking courses and winter activities (often for free) like snowshoeing, cross-country skiing, and tubing.

3. Promote the unique experiences in provincial parks

Based on the best practices in other national and international jurisdictions, it is clear that a new Manitoba Parks strategy should dedicate more resources towards the creation and implementation of a comprehensive marketing strategy.

Leveraging Travel Manitoba's expertise in marketing destinations throughout the province, an agreement between Manitoba Parks and Travel Manitoba could result in the development of a marketing strategy that encompasses branding, photography and video content, promotional and merchandising plans, and social media campaigns to attract domestic and international visitors to provincial parks.

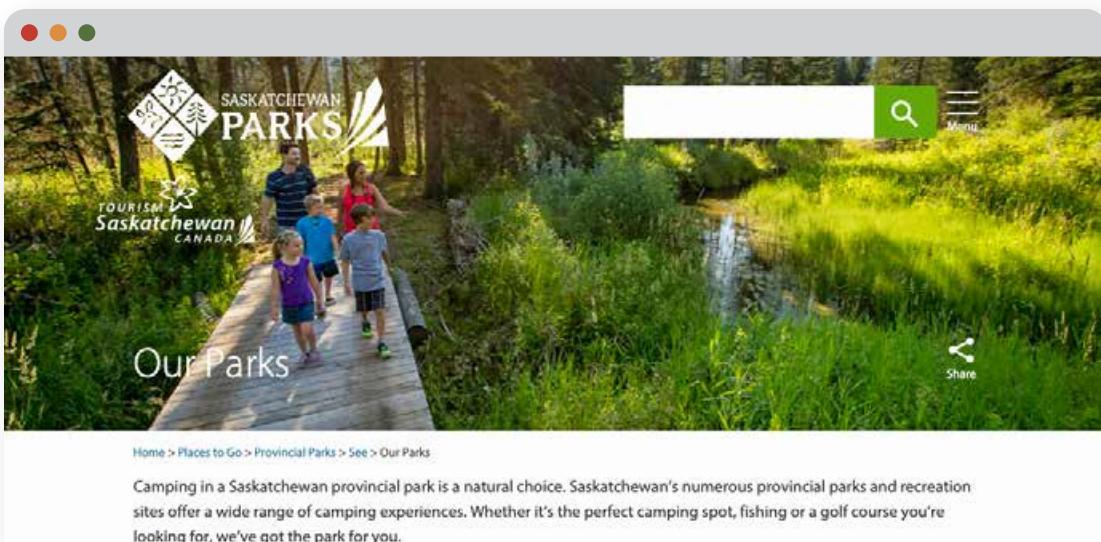
Development of a distinct and clearly identifiable Manitoba Parks brand that communicates the values of the park system and tells a compelling story about unique experiences within Manitoba Parks is critical in increasing local, national and international visitation. A distinct Manitoba Parks brand would also support opportunities for new revenue streams through the sale of merchandise.

The first point of contact with a potential visitor is usually in their own home while they are comparing options for a day trip, weekend getaway and or extended vacation. Having a website with inspiring photography, attractions and amenities is crucial to attracting new visitation, including travellers from out of province. A user-friendly website should allow potential visitors to explore before they visit, select the right destination for them and prepare according to their trip. A functional system must include an easy to navigate reservation system that does not require any previous experience or outside knowledge of the park systems to select the right accommodations for their desired experience.

The best systems connect visitors with commercial businesses within their parks that offer experiences, services, merchandise and accommodations that the park system does not directly offer themselves.

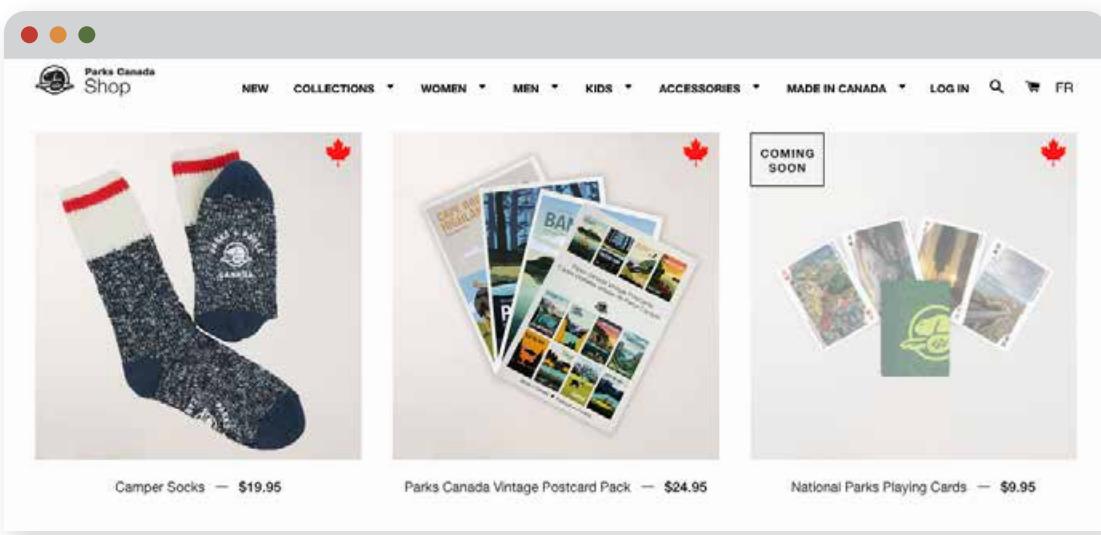


New Hampshire State Parks offers one of the most extensive parks merchandise collections. Their online and in-store gift shops sell books and maps about different parks; patches, pins, and magnets; branded hiking poles; shirts; and other souvenirs. Their physical stores also give visitors the opportunity to order memorial benches and New Hampshire State Park Licence Plates, which include access to all parks with the \$85 annual licence plate fee.



Tourism Saskatchewan, Québec Parks and United Kingdom Nation Parks have visually attractive websites that lead with experiences and offerings as the entry to exploring their parks, rather than a locator-style map interface. These websites draw people to the parks that meet their expectations and desired activities.

Many national and provincial parks have succeeded in developing and marketing a distinct brand for their park systems that communicates their values and identity. Many have also created a new revenue stream through branded merchandise that is only available from shops in each park. This exclusivity creates additional desire in frequent park visitors to explore further afield.



Parks Canada, Ontario Parks, and Sépaq (Québec Parks) have succeeded at developing and marketing distinct brands for their park systems that communicate their values and identity and entice frequent park visitors to explore further afield.

A strong social media and digital marketing plan are essential components of provincial parks' annual marketing plan. The study highlights many best practices in this area. For example, Alberta does an annual call for social media influencers through their Parks Ambassador program, selecting a variety of age groups and locations and preferred kinds of recreational activities. The Parks Ambassadors are trained to create the appropriate tone in their posts. The positions are volunteer roles and compensation is free camping.

Saskatchewan Parks also works with social media influencers. Every year they hire a "Saskatchewanderer" to promote their parks. The Saskatchewan Provincial Parks web page is hosted on Tourism Saskatchewan's website and Saskatchewan Parks manages the content.

4. Partner with stakeholder groups and communities to enrich parks

All Manitoba Parks are located on Treaty Territories and Indigenous ancestral lands. Manitoba Parks should partner with Indigenous communities and organizations and find opportunities for Indigenous management in parks as seen elsewhere around the globe. The report highlights best practices in Indigenous partnership to support tourism in Australia and New Zealand.

Collaborating with local communities adjacent to or within a provincial park, such as Travel Manitoba's Place Brand communities, offers a more fulsome destination experience with additional regional attractions and services beyond the park's products.

The success of the Friends of Spruce Woods group is evidence that empowering passionate local stakeholders to contribute to their local provincial park is beneficial for both parties. Through a "Friends Of" group, local stakeholders can act as a volunteer citizens' advisory group that provides supplemental and auxiliary assistance to Manitoba Parks. These groups are able to generate revenue from events and collect donations that go towards improvements or programming within their local park. They can see a direct connection between their efforts and improvements to the park in their backyard.

5. Offer more quality accommodations and services

High-quality visitor experiences in Manitoba Parks are heavily influenced by the quality and diversity of accommodations, services and experiences provided by commercial operators in the parks. It is essential that Manitoba Parks increase its capacity to support existing operators, develop relationships with new operators and foster an environment that encourages entrepreneurialism and high-quality customer service standards.

It is important for Manitoba Parks to view commercial operators as essential partners in the success of the parks systems. Travel Manitoba has many connections with industry and experts that could assist in establishing an entrepreneurial approach that meets traveller expectations.

At the core of these relationships, Manitoba Parks needs to have well-documented policies that guide all aspects of quality service. Scotland has one of the most renowned certification processes for ensuring clear parameters for the quality function and service of its partners within its parks. This system is beginning to be used by other jurisdictions.

In the Netherlands, the park's recreational entrepreneurs and accommodation owners are called "hosts" and are advertised as guides to the park. Hosts in parks must take a National Park Host of the Landscape course so that they are well informed about the special features of the particular parks they operate in.

6. Provide the means for improvement of provincial parks

Manitoba's parks have some of the lowest access and usage fees in Canada according to the Best Practices research. As a result, Manitoba Parks has a low recovery rate on their operating costs in comparison to some other jurisdictions.

Modernizing park assets and infrastructure comes at a cost, and increasing the level of service without increasing the user price would not be financially sustainable for Manitoba Parks. A system-wide increase in fees would increase the recovery rate in individual parks and ensure park spaces are maintained with modern infrastructure.

Park infrastructure improvements would require an increase in rates that is implemented over an extended period. For low-income residents, means of subsidizing park experiences could also be explored.

Many jurisdictions partner with local libraries to provide equitable access by allowing library members to borrow park passes and less commonly camping equipment. Corporate sponsorship for these programs could offset the cost/lost revenue.

For Manitoba Parks to be more financially sustainable, investments and improved service must be matched with improved revenue. Not all parks within the system will be able to recover all the costs of their operations, and some parks activities may be seen as a provincial government contribution to the well-being and quality of life of all Manitobans.

A mechanism for transparent allocation of revenues that supports improvements where opportunity exists in financially viable parks should be considered.

Comparative Park Entry Permit

Fee Type	Parks Canada	BC	Ont.	Alb	Que	Sask	MN*	ND*	SD*	MB	Average
Park Entry Permits											
1-Day	\$9 (per person)	\$19		\$9 (per person)	\$10	\$9	\$9	\$10	\$10	\$11	
3-Day									\$17	\$17	
Weekly						\$40				\$40	
Annual (All-Parks)	\$69	\$20	\$99		\$80	\$75	\$44	\$44	\$46	\$45	\$58

*Converted to Canadian dollars

Manitoba's 1-day park permit is comparable to other parks; however, Manitoba's annual park passes are about \$20 less expensive than the average of provinces examined. When adding in State and Parks Canada fees, Manitoba's annual park passes are only \$13 less expensive than the average. When considering the cost to an average family of four—two adults and two children under the age of 18—the cost comparison changes.

When looking at rates across all jurisdictions examined, the average cost for a family of four is \$75 assuming both children are under 18 years old. This compares to Manitoba's current annual park pass priced at \$44.50, a difference of about \$30.

Comparative Camping Fees

Fee Type	Parks Canada	BC	Ont.	Alb	Que	Sask	MN*	ND*	SD*	MB	Average	Differential
Nightly Camping Fees												
Basic Services (min)	\$27	\$22	\$34	\$8	\$18	\$18	\$26	\$15	\$14	\$12	\$19	\$7
Basic Services (max)		\$23	\$47	\$29	\$32	\$20	\$32	\$22	\$28	\$23	\$28	\$5
Electrical Services (min)			\$39	\$16	\$27	\$32	\$38	\$19	\$33	\$16	\$28	\$12
Electrical Services (max)	\$33		\$42	\$37	\$50	\$32	\$44			\$27	\$38	\$11
Electrical/Water Services (min)				\$24	\$31	\$32	\$48			\$19	\$31	\$12
Electrical/Water Services (max)	\$35			\$45	\$57	\$32	\$55	\$32		\$26	\$40	\$14
Full Service (min)				\$32	\$36	\$42	\$55	\$38		\$23	\$38	\$15
Full Service (max)	\$38			\$53	\$65	\$42	\$55			\$28	\$47	\$19
Backcountry Camping / Adult (min)	\$17	\$10	\$9	\$12			\$26				\$15	\$15
Backcountry Camping / Adult (max)	\$75	\$10	\$19				\$29				\$33	\$33
Additional Fees												
Reservation Fee	\$13		\$12	\$12			\$11	\$9		\$10	\$11	\$1
Change Fee	\$13		\$9	\$5			\$4			\$4	\$7	\$3

*Converted to Canadian dollars

Manitoba's camping fees are consistently lower than other provinces, with the exception of Alberta for basic sites. When compared to the United States, Manitoba's nightly camping fees are slightly below North and South Dakota and are significantly below Minnesota. Manitoba's sites that include a combination of electrical, water, and sewage services, are consistently cheaper than other provinces and Parks Canada. Manitoba does not charge fees for backcountry camping, unlike several other provinces. The chart above identifies the difference between the average price for the jurisdictions examined and Manitoba's price for camping services. The most significant differential can be found for full service and backcountry sites.

Comparative comfort and seasonal camping

For comfort camping, Manitoba's rates are significantly lower than the posted rates in other provinces, with the exception of British Columbia. Manitoba's yurt fee is almost half of the cost charged in Ontario, while the maximum cost for a rustic cabin in Manitoba is almost one-third as much as it is in Ontario. North Dakota's rates are even higher for yurts and cabins than Ontario.

Manitoba's seasonal camping rates are significantly less than Ontario and Saskatchewan. Comparison to British Columbia is difficult since the minimum amount is actually for a four-week period instead of a full "season". BC Parks also varies pricing on a park-by-park basis. Anecdotally, Manitoba Provincial Park rates for seasonal campsites are also significantly lower than privately owned seasonal campgrounds.

Fee Type	Parks Canada	BC	Ont.	Alb	Que	Sask	ND*	MB	Average	Differential
Comfort Camping / Fixed-Roof Accommodations										
Yurts / Deluxe Tents	\$123		\$110		\$65	\$121	\$57	\$95	\$38	
Rustic Cabins (Min)		\$17	\$55			\$77	\$38	\$47	\$9	
Rustic Cabins (Max)		\$41	\$150			\$160	\$54	\$101	\$47	
Camp Cabin			\$130			\$160	\$79	\$123	\$44	
Seasonal Site Rentals										
Basic Services (Min)	\$336	\$757			\$960		\$454	\$627	\$173	
Basic Services (Max)	\$2,160	\$2,218			\$1,220		\$839	\$1,609	\$770	
Electrical Services (Min)		\$1,612			\$2,270		\$588	\$1,100	\$512	
Electrical Services (Max)		\$2,835			\$2,270		\$982	\$2,029	\$1,047	
Electrical/Water Services (Min)							\$880	\$880	\$0	
Electrical/Water Services (Max)							\$946	\$946	\$0	
Full Service (Min)							\$1,061	\$1,061	\$0	
Full Service (Max)							\$1,174	\$1,174	\$0	

* Converted to Canadian dollars

Structure and revenue management

The study did not explore operational models in other international jurisdictions. In Canada, provincial parks are typically managed within government departments that often include several other responsibility areas such as conservation, environment, infrastructure and resource management. Other than Québec, Canadian jurisdictions operate with government appropriations to finance their operations as a division within a specific department.

Province	Structure	Revenue Management
Ontario	Department	Yes—but must be net zero at year end
Saskatchewan	Department	Yes—but must be net zero at year end
Alberta	Department	Yes—but must be net zero at year end
Québec	Crown Corporation	Yes
Manitoba	Department	No

The common challenge across these organizations is their ability to manage capital renewal and obtain budget for new services to meet visitors' expectations. In times of limited government funds, it is difficult to make park visitation and recreation a priority and, over time, many parks organizations have been subject to decreasing resources and forced to shrink operations to simplify maintenance functions.

Some organizations, such as in Ontario, Saskatchewan and Alberta manage partial operating budgets within the year that gives them some access to manage revenues within the budget cycle. However, they are required to net this fund out to zero at year-end and return any surpluses to the treasury.

The only jurisdiction in Canada not managed within a government department is in Québec. In Québec, parks are managed by a crown corporation - Sépaq. This arm's length organization manages all revenue, expenses, and capital and assets of the provincial parks. In addition, most amenities including accommodations are owned and operated directly by Sépaq. Sépaq's aggressive development over the last number of years has seen them take on over \$200 million in debt to invest in improvements and new accommodations and enhanced service.

Donations and legacy giving

BC Parks has taken the lead in the practice of obtaining financial support through donations and legacy giving. BC Parks is a government organization like Manitoba Parks but they have been using a special account, the Park Enhancement Fund, since 2008. This fund allows BC Parks to offer tax receipts for any donation. People may also give to BC Parks through the BC Parks Foundation, the parks department's official charitable partner.

The goal of the BC Parks Foundation is for "British Columbia to have the best parks system in the world, supported by an active, diverse and innovative local and international community." The BC Parks Foundation was only initiated in 2018 so is relatively new in its development. To date, it has focused on the acquisition of additional park lands.

The BC Parks Foundation offers a variety of giving options, including donating real estate, cars and boats, will and legacy planning, as well as donating stocks, securities, and standard cash donations.

Benefits of Park System Modernization

The major benefits to the opportunities the study identified are the opportunities to realize balanced outcomes in terms of financial sustainability, equitable access to nature and conservation of natural assets.

Benefits for Manitoba residents: Improving the quality of parks and their offerings improves the quality of life for Manitobans and helps ensure Manitoba Parks can maintain equitable access for all.

Strengthening capacity for conservation: Modernizing parks creates an opportunity to educate tourists and residents about conservation efforts and showcase the intrinsic value of nature and natural systems.

Parks as tourism drivers: By improving Manitoba's parks to better align with visitor expectations, the tourism potential of the parks system increases. Local and domestic markets demand similar service offerings and quality standards. Improving parks for residents will enhance our competitiveness internationally.

Economic benefits: Although beyond the scope of this study, increased tourism and activity in parks will have a direct impact on Manitoba's GDP. These impacts will be felt well beyond the revenue generated by Manitoba Parks agencies themselves.

Aligning with Manitoba Tourism Strategy goals: Finally, improving the visitor experience in parks is critical to the success of the Manitoba Tourism Strategy, which aims to aggressively grow tourism revenues by 50 per cent to \$2.2 billion by 2030.

PARK PRIORITIZATION – PRIMARY AND SECONDARY

Primary Prioritization – Invest to yield higher ROI

One of the main objectives of the study was to identify top parks with the potential to generate the highest return on investment from a tourism perspective.

Parks were prioritized according to several criteria, including quality of features, tourism opportunity potential, diversity of activities available, proximity to population, visitation demand, capacity for growth, infrastructure condition and alignment with provincial strategies.

Prioritization Criteria



Six parks were identified as having the highest potential to improve Manitoba Park's financial sustainability and generate significant return on investment. With the appropriate amount of investment, these parks have the potential to be tourism destinations - parks that attract visitation both domestically and internationally. As well, they have the potential to improve the overall rate of recovery of the costs associated with operating Manitoba's park system.

Top 6 Priority Parks (in alphabetical order):

- Birds Hill
- Grand Beach
- Clearwater Lake
- Hecla
- Whiteshell
- Spruce Woods

Recommended investments in the top six priority parks include amenity and infrastructure improvements as well as strategic investments in additional campsites, campground services and yurts. The study estimates that the total capital cost to implement all recommended improvements to the top six priority parks is estimated to be \$33.87 million.

Campsite upgrades and new campgrounds are proposed to add 356 new campsites to the top six priority parks. A total of 349 basic sites would be upgraded to electrical or full service. By adding 106 new comfort camping options, Manitoba Parks will be pushing to meet this high consumer demand area and attract new visitors for an experience that is difficult to obtain under the current supply.

Park Prioritization - Secondary

Using the same criteria, nine additional parks were ranked to round out the top 15 parks with the highest potential to improve Manitoba Park's sustainability and generate return on investment and economic benefit for the Province. With the appropriate amount of investment, these nine parks have the potential to attract visitation both domestically and internationally, and generate tax revenues for the province and improve the overall recovery of Manitoba's tourism economy. They are listed in alphabetical order.

- Asessippi
- Duck Mountain
- Little Limestone
- Nopiming
- Paint Lake and Pisew Falls
- Pembina Valley
- Pinawa Dam
- Turtle Mountain and William Lake
- Winnipeg Beach

Investments are needed to improve these parks to increase visitation levels. Investments include: modernizing facilities, increasing services offered, improving infrastructure such as adding picnic areas and upgrading roads and increasing marketing expenditures.

FINANCIAL SUMMARY – ALL PARKS COMBINED

A total of \$97.7 million in potential capital investments were identified in total in the study, including the \$33.9 million already identified for the top six priority parks. Of the \$97.7 million in capital investments, \$70.2 million relate to existing asset improvements and \$27.5 million relates to new infrastructure projects.

All Parks Combined Financial Summary

	Future State	Current State	Change (\$)	Change (%)
Revenue	26,348,119	18,625,698	7,722,420	41.5%
Total Expenditures	38,285,975	32,248,000	6,037,975	18.7%
Net Deficit – Parks and Resource Protection	(11,937,856)	(13,622,302)	1,684,446	-12.4%
Recovery Rate – Parks and Resource Protection	69%	58%		

Aside from the capital costs identified for the top six priority parks, no further prioritization has been applied to the remaining \$63.8 million in additional capital costs identified for the secondary group of parks identified. Further strategic planning and investment prioritization by the department may reduce the estimated capital cost by cancelling or postponing low priority projects.

Improvement measures across all parks are estimated to increase the recovery rate from 58 per cent to 69 per cent annually.

Additional revenues from other sources analyzed such as backcountry management, sponsorship initiatives and merchandising should be pursued. However, for the purposes of this financial summary, revenues from these sources are assumed nominal.

While the study did not explore opportunities to partner with the private sector in improving the visitor experience in the top priority parks, there is potential for Travel Manitoba to collaborate with Manitoba Parks in creating development plans for these parks that could include offering the private sector opportunities to invest in accommodations, restaurants and attractions.

▼ Hecla Provincial Park



CONCLUSION

The Evaluating the Tourism Potential of Manitoba's Provincial Parks report provides a wealth of information and data to support the development of a new Manitoba Parks strategy. Travel Manitoba will continue to partner with Manitoba Parks in supporting the implementation of a new strategy to ensure the increase of tourism visitation to the province. Travel Manitoba could play a leadership role in branding and marketing parks, including the creation of a new website and social media platforms.

Travel Manitoba would leverage its strong relationships with tourism businesses, receptive tour operators, 12 place brand destinations throughout the province, the Indigenous Tourism Association of Canada and Indigenous Tourism Manitoba to support Manitoba Parks and to collectively grow the tourism sector by advancing a new provincial parks strategy.

