

Evaluating the Tourism Potential of Manitoba's Provincial Parks

Prepared for Travel Manitoba

Final Report 2022

*The following study and report was completed by MNP
in collaboration with HTFC Planning & Design
and PRA Prairie Research Associates.*



Table of Contents

Introduction	1
Approach.....	2
Key Information about Manitoba Parks.....	3
Surveys and Survey Analysis	7
Best Practices & Trends	23
Potential Demand and Market.....	47
Creating a Value Proposition.....	53
A Plan for the Renewal of Manitoba Parks	69
Park Prioritization	77
Overall Financial Impact – All Parks	102
Benefits of Parks System Modernization.....	106

Figures

Figure 1: Schematic of Project Approach	2
Figure 2: Average Camping Unit-Nights by Provincial Park, 2017-2019.....	4
Figure 3: Commercial Operator & Special Consideration Organization Description	5
Figure 4: Operating Location for Commercial Operators & Special Consideration Organizations	6
Figure 5: Commercial Operator Self Reported Open and Busiest Month.....	6
Figure 6: Attitude to Parks (n=1,309-1,630).....	8
Figure 7: Most Common Activities of Interest by Park Visitor Group.....	11
Figure 8: Most Common Activities of Interest by Park Visitor Group (continued)	11
Figure 9: Barriers to Park Visitation	12
Figure 10: Park Campground Occupancy 2010-2019.....	14
Figure 11: Campsite Services Visitors Wanted vs. Campsites Visitors Were Able to Get.....	15
Figure 12: Campsite Satisfaction.....	16
Figure 13: Number of Times Day Visitors Visited Parks per Year (n=1,585).....	17
Figure 14: Would Day Trippers Recommend a Park to a Friend (n=1,846)	17
Figure 15: Number of Years Visitors Have Stayed in Parks (n=623)	18
Figure 16: Number of Years Cottage Owners Have Owned Their Cottage (n=1,038).....	19
Figure 17: Satisfaction Level with Cottage Services.....	20
Figure 18: Total Visitor Spending and Visitation to Manitoba, 2019.....	48
Figure 19: Survey Responses - Tours and Nature-based Experiences (n=1,614-1,638).....	54
Figure 20: Ranking Activities and Site-based Experience (n=1,614 - 1,638)	56
Figure 21: Ranking Accommodations (n=1,613 - 1,641).....	58
Figure 22: Prioritization of Tours.....	61
Figure 23: Prioritization of Activities	61
Figure 24: Prioritization of Accommodation Options	62
Figure 25: SWOT Summary for Manitoba Provincial Parks.....	63
Figure 26 Current State of Annual Operating Surplus/Deficit - Top 6 Parks	87
Figure 27: Future State Annual Operating Surplus / (Deficit) – Top 6 Parks	89

Tables

Table 1 Average Age of Visitor/User by Category In Manitoba	9
Table 2: 2019 Parks with Highest Utilization	22
Table 3: 2019 Parks with Lowest Utilization.....	22
Table 4: Comparative Park Entry Permit in Canada and Select American Jurisdictions (rounded).....	44
Table 5: Comparative Camping Fees in Canada and Select American Jurisdiction (rounded).....	45
Table 6: Comparative Comfort and Seasonal Camping Fees in Canada & Select American Jurisdictions.....	46
Table 7: Origin and Number of Visitors Making Reservations 2019	47
Table 8: Potential International Market Size by Source Country	49
Table 9: International Demand for Vacation Activities	50
Table 10: International Demand for Accommodations.....	51
Table 11: Tours and Nature-based Experiences by Gender and Age	55
Table 12: Activities and Site-Based Experiences by Gender and Age.....	57
Table 13: Accommodations by Gender and Age	59
Table 14: Top Priority Parks Alignment to Criteria.....	79
Table 15: Legend	79
Table 16: Change in Financial Position for Birds Hill Provincial Park.....	81
Table 17: Change in Financial Position for Clearwater Provincial Park.....	83
Table 18: Change in Financial Position for Grand Beach Provincial Park	84
Table 19: Change in Financial Position for Hecla Grindstone Provincial Park.....	85
Table 20: Change in Financial Position for Spruce Woods Provincial Park.....	86
Table 21: Change in Financial Position for Whiteshell Provincial Park	87
Table 22: Future State of Campsite Inventory - Top 6 Parks.....	89
Table 23: Top 6 Parks Combined Financial Summary.....	90
Table 24: Secondary Priority Parks Alignment with Criteria.....	93
Table 25: Top 15 Parks Combined Financial Summary	99
Table 26: Summary of Potential Activities, Accommodations & Tours.....	101
Table 27: All Parks Combined Financial Summary.....	103

Images

Image 1: Alberta Parks uses Park Ambassadors to share their experiences in provincial parks on social media, 2021.....	25
Image 2: Saskatchewanderers are social media influencers who take photographs in Saskatchewan Parks. Saskatchewan Parks, 2021.....	26
Image 3: Sleeping in a hanging tent in Germany, Waldseilgarten Höllschlucht (2021).....	28
Image 4: "Fifth Season" kayaking in Sooma National Park, Estonia (2021)	29
Image 5: White bicycles in De Hoge Veluwe Park in The Netherlands (2021)	29
Image 6: Arrowhead Visitor Centre, Ontario Parks (2021).....	30
Image 7: Naturum Laponia Visitor Centre, Stora Sjöfallet/Stuor Muorkke National Park (2021).....	31
Image 8: Rabaska in Parc national des Hautes-Gorges-de-la-Rivière-Malbaie. Photo by Mathieu Dupuis, Sépaq, 2021.	31
Image 9: An ôasis and MicrOcube, Parks Canada, 2021	32
Image 10: Station Touristique Duchesnay, Sépaq, 2021.	33
Image 11: Dinosaur Campground, Travel Alberta, 2021.....	34
Image 12: A TrailRider in action, Rocky Mountain Adaptive, 2021.....	35
Image 13: The Netherlands' Host of the Landscape Course, IVN (2021).....	38
Image 14: BC Parks Donation Options, BC Parks website (2021)	42
Image 15: Learn to Camp, Ontario Parks, 2021.....	43

Introduction

PURPOSE

Travel Manitoba provides a province-wide platform to promote Manitoba as a premier travel destination. Manitoba's Provincial Parks and the extraordinary natural resources within them are an important part of positioning the province as a must-visit location. The desire for tourists to explore nature is increasing significantly around the world, and Manitoba has outstanding natural features to share. This report analyzes the best model for Manitoba Parks to create a highly recognizable brand to attract and serve visitors seeking world-class destinations for tourism, adventure, and recreation. The study conducted extensive analysis to determine what is important to visitors. It considers other models around the world and across Canada to better understand the best way to build the most effective and sustainable organization to attract and serve park users. Finally, this report provides recommendations for a renewed Parks strategy that has improved focus and investment and enhanced service.

Travel Manitoba, in collaboration with the Manitoba Chambers of Commerce and the Manitoba Government, launched an updated Manitoba Tourism Strategy in 2021, which not only addresses the lasting impacts of the COVID-19 pandemic but also forges ahead to realize the potential to grow Manitoba's tourism industry. Manitoba's Provincial Parks are identified as a significant opportunity within the Manitoba Tourism Strategy. The strategy also identifies changing consumer expectations regarding travel and tourism, with increased interest in nature-based, experiential tourism; an expectation for connectivity; and online booking capabilities. With these opportunities and changing consumer demands in mind, this study takes an in-depth look at the role of Manitoba Parks in tourism and the potential to increase visitor spending and meet changing expectations while contributing to a more sustainable operations and realizing a more significant contribution to the Manitoba economy. To date, the vast majority of park visitors are from within Manitoba. There is an opportunity to showcase the great experiences available to park visitors to increase visitations not only from within the province but also from the international tourism market.

Many tourists look to nature-based experiences as key attractions for their visit. They are especially attracted to noteworthy and special features and wildlife, such as polar bears and whales (Churchill), the largest waterfalls (Niagara), and majestic mountains (Banff), while also looking for more intimate experiences and opportunities to engage directly with nature and explore natural landscapes. They require access in the form of suitable transportation links and places to stay. They expect easily accessible resources to facilitate their travel planning and guide the delivery of their travel experiences.

Manitoba Parks protects and provides access to nature. Its 92 parks are located in each of the six eco-zones in Manitoba; this collection of ecological zones is the most diverse of any province in Canada. As a result, Manitoba can offer much by way of diverse nature-based sights and experiences to satisfy many tourists' expectations.

The Parks and Resource Protection Division that manages and operates Manitoba Parks is faced with a number of challenges. They have an ageing park infrastructure that, in many cases, is 40 to 50 years old. Parks management also delivers programming across 76 of the 92 parks and provides service to the largest provincial parks-based cottage community in Canada. Financial sustainability remains challenging, with investment and cost management structured in a way that makes sound financial decision-making difficult (there is little connection between revenue and expenses and a limited ability to show payback on investment opportunities). The organization has lacked investment in tools that help them better understand market potential, along with actual data management for

park assets.

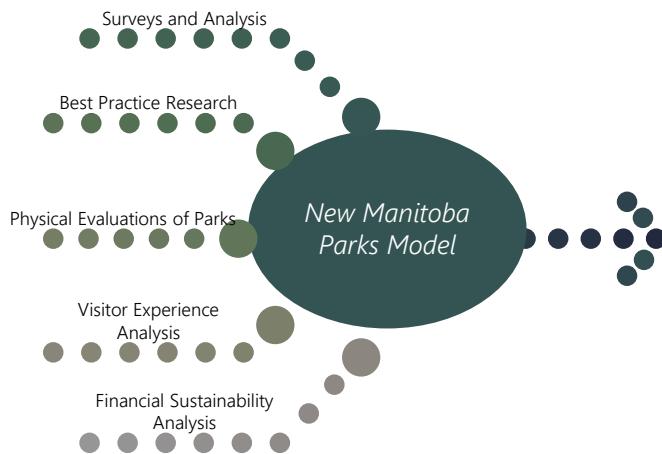
Travel Manitoba has retained MNP and a team of specialists to explore the potential for enhanced tourism in Manitoba Parks and the associated impact on the visitor economy. Included in the objectives of this study are identifying strategies and tactics to improve the perceived value of parks to both visitors and potential investors, thereby facilitating the investment and subsequent return necessary for the modernization of Manitoba Parks' assets and operating model.

Approach

To complete the study, MNP assembled a multidisciplinary team that brings to bear key areas of expertise on this topic. MNP brought organizational and financial acumen to the team and played a project management role. MNP has partnered with HTFC Planning and Design (HTFC) and Prairie Research Associates Inc. (PRA) on this study. HTFC brings over 50 years of collective experience in parks planning and design; community and resource planning; and economic development across Canada. HTFC also has extensive expertise in regional planning and community development that is relevant not only to this work, but also within the areas of transportation, culture, recreation, and tourism planning, all of which are considered in this study. PRA provides market research services to private and public sector clients across Canada. For this study, their contributions included extensive survey and analytical services to inform the work and recommendations with quality primary research and analysis. Overall, the project team represents a senior, highly experienced consulting group, all of whom are based here in Manitoba.

The approach to this study included multiple streams of preliminary research and analysis, as presented in Figure 1 below. Each of these streams helped inform the final recommendations.

Figure 1: Schematic of Project Approach



Early on in setting up the methodology and in the review of prior documents, it was evident that much of the focus would be on analyzing the visitor experience. Logically, the better a person's experience, the more likely they are to return to the parks, and the more likely they are to spread positive words to others. What is more: the better their experience, the more likely they see value that, in turn, will hopefully generate more opportunities for revenue from their ability to access the parks, enjoy activities, and purchase accommodations and food services during their visit. Therefore, this "visitor experience" is core to the analysis herein. This study utilizes the term "visitor experience" frequently, also using terms like "user" and "visitor" to mean someone who accesses the park to experience or "use"

the various amenities and enjoy the natural features within the parks.

Key Information about Manitoba Parks

Manitoba Parks comprises 92 Provincial Parks, of which 76 are “operational parks.” The definition of “operational parks” refers to the active management of park improvements, including developed infrastructure (roadways, boat launches, campgrounds, cottage subdivisions, etc.) and focused service-delivery programming (campground reservation services, roadway and facility maintenance, waste management, etc.) to enhance park users’ experiences within park landscapes. The remaining 16 are “non-operational parks” that focus on “public goods conservation” and provide no department infrastructure or focused service-delivery programming. The operating model for operational parks is often described as “mixed,” as it relies on both government and private operators to run parks – though the government side of the equation is more heavily weighted. The 76 operational parks contain:



* Organizations that are providing services and activities such as youth camps, churches, RCMP, fire departments and utility companies

Cottages

Most cottages are on long-term land leased from the Province of Manitoba through Manitoba Parks. A few also exist within park boundaries on “titled” property. In addition to lease fees, cottagers pay service fees for utilities and municipal-like services. Cottagers typically maintain their own properties and improvements, as well as waterfront amenities (if they have them). Assuming cottages are utilized at least as much as campsites, there are likely a minimum of 226,000 cottage unit-nights in an average year.

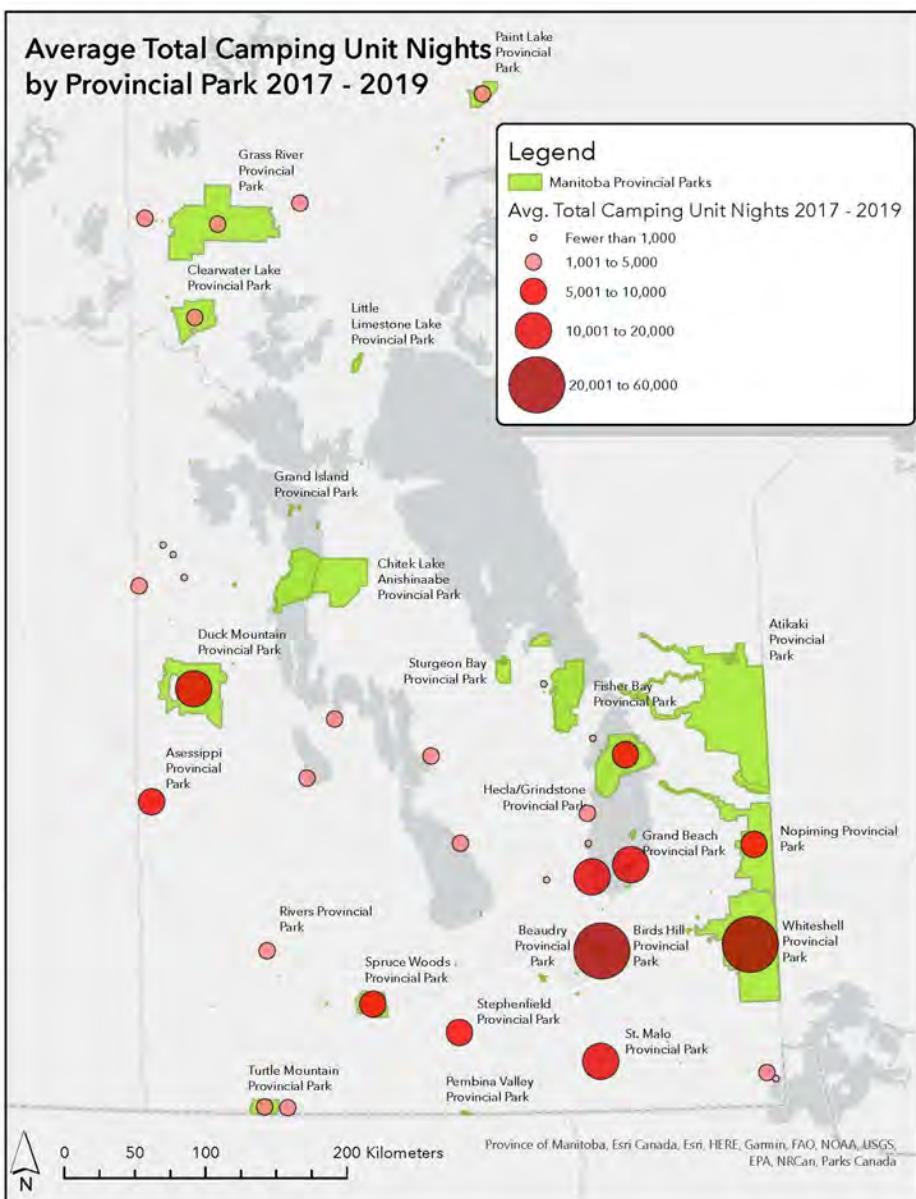
Campgrounds

One of the dominant visitor activities carried out by Parks is the operation of the 65 campgrounds within the parks system. Parks manages all operational aspects, from registration and nightly or seasonal fees to services such as sewer and water hookups; showers and washrooms; and even the supply of firewood. In a few instances, Parks owns and operates a handful of cottages for rent and a number of yurts spread throughout several key parks. Between 2017 and 2019, there were an average of 222,000 annual camping unit-nights per year realized within the

parks.

On average, Birds Hill and Whiteshell Provincial Parks accounted for 40%, or 89,500, of all campground nights between 2017 and 2019, and more than 116,800 unit-nights in 2020. The map in Figure 2 shows the geographic distribution of camping unit-nights.

Figure 2: Average Camping Unit-Nights by Provincial Park, 2017-2019

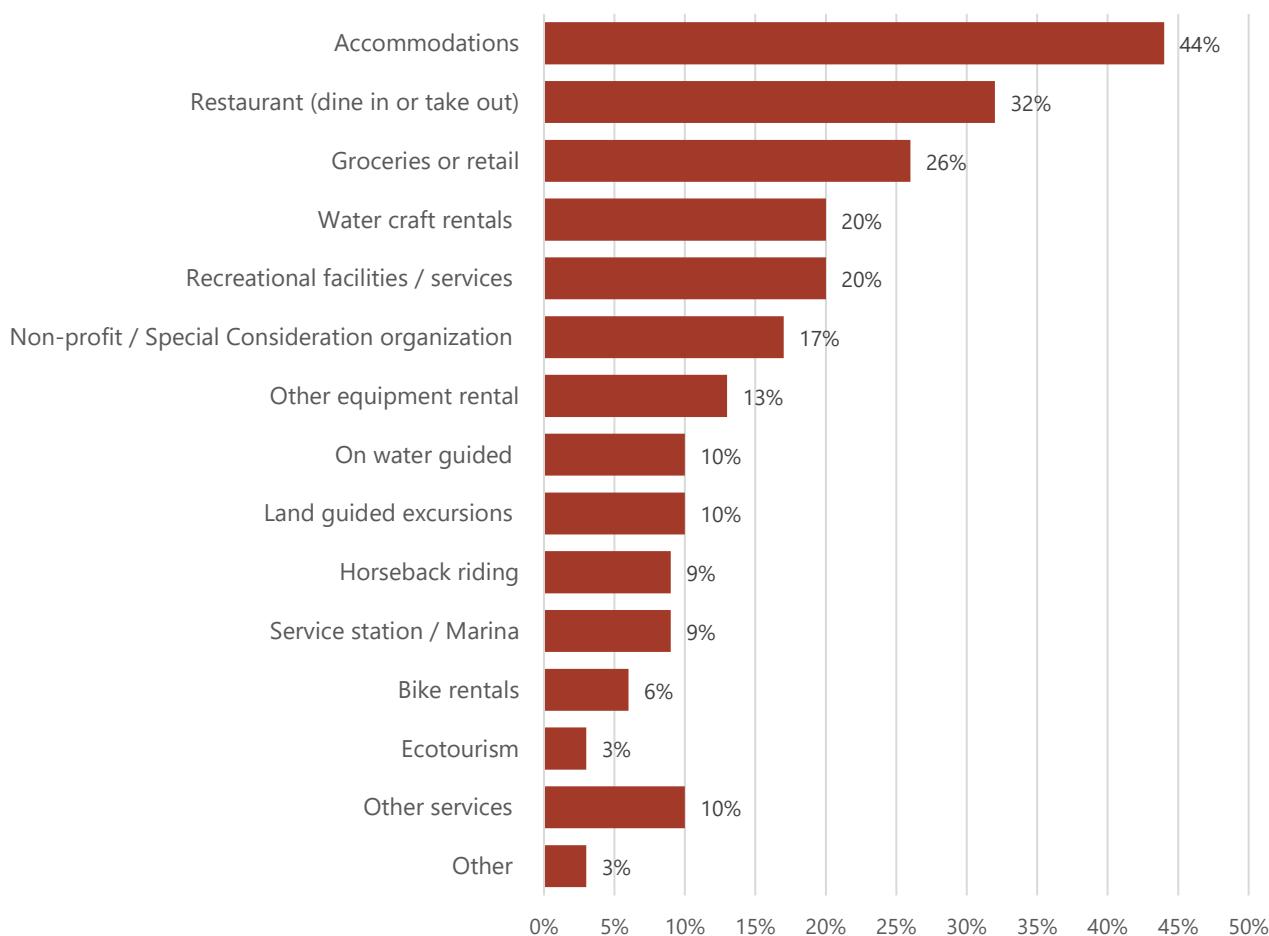


Add the average 11,000 comfort camping unit-nights for the same period and another 41,000-annual unit-nights from all the resorts, hunting and fishing lodges and motels, and it is reasonably safe to assume that **Manitoba Provincial Parks are home to at least 500,000 overnight stays annually.**

Commercial Operators and Special Consideration Organizations

Essential to the success of Manitoba Parks are existing commercial operators and Special Consideration Organizations (SCOs). Commercial operators provide accommodations, food and beverage services, grocery and retail stores, rentals, and other services that complement Parks-run operations. SCOs are generally public services entities that are neither part of Manitoba Parks, nor directly part of the Government of Manitoba, and are not considered commercial organizations or for-profit organizations. Some examples are youth camps, churches, RCMP detachments, fire departments and utility companies. Most commercial operators provide accommodations, food services (restaurants) or grocery/retail (Figure 3) and operate in either the Whiteshell and/or Birds Hill (Figure 4).

Figure 3: Commercial Operator & Special Consideration Organization Description



Most commercial operators and SCOs in parks are well-established; the typical business or SCO has been in operation within parks for over 36 years, with about half having been in parks since before 1986. Less than one-fifth (16%) have been operating since 1950 or earlier, while less than a handful (6%) are new to parks since 2019.

Generally, these organizations are small, with most (90% of those that provided financial information) generating less than one million dollars in revenue, including 47% with a revenue of \$100,000 or less.

Figure 4: Operating Location for Commercial Operators & Special Consideration Organizations

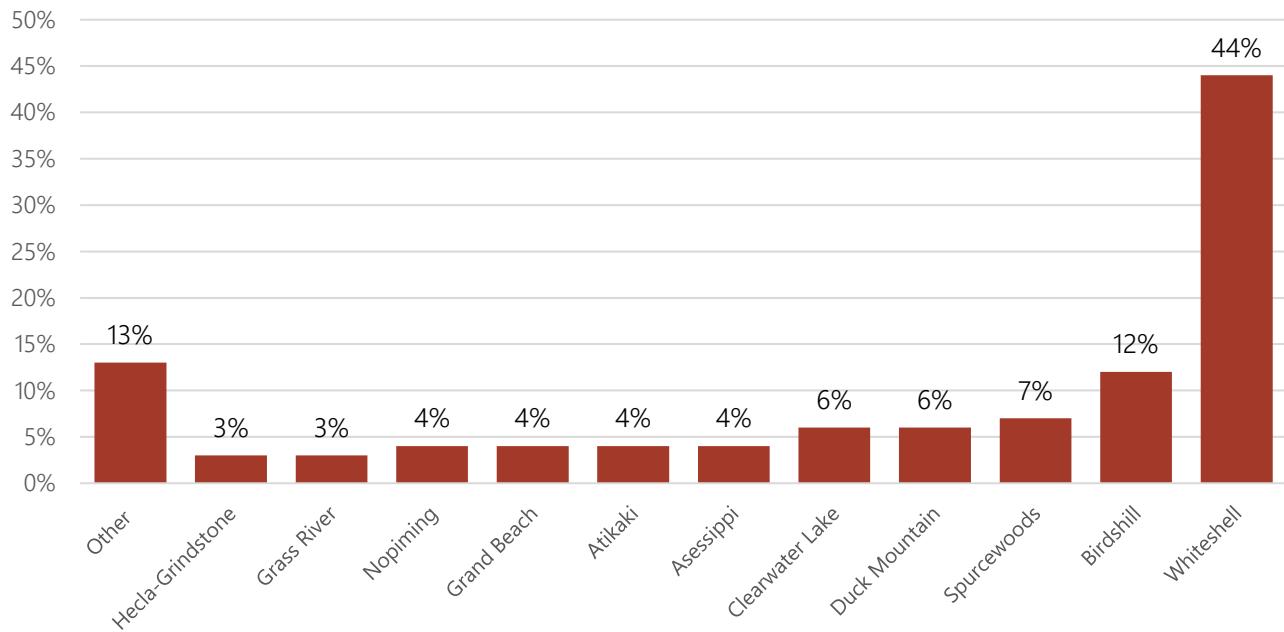
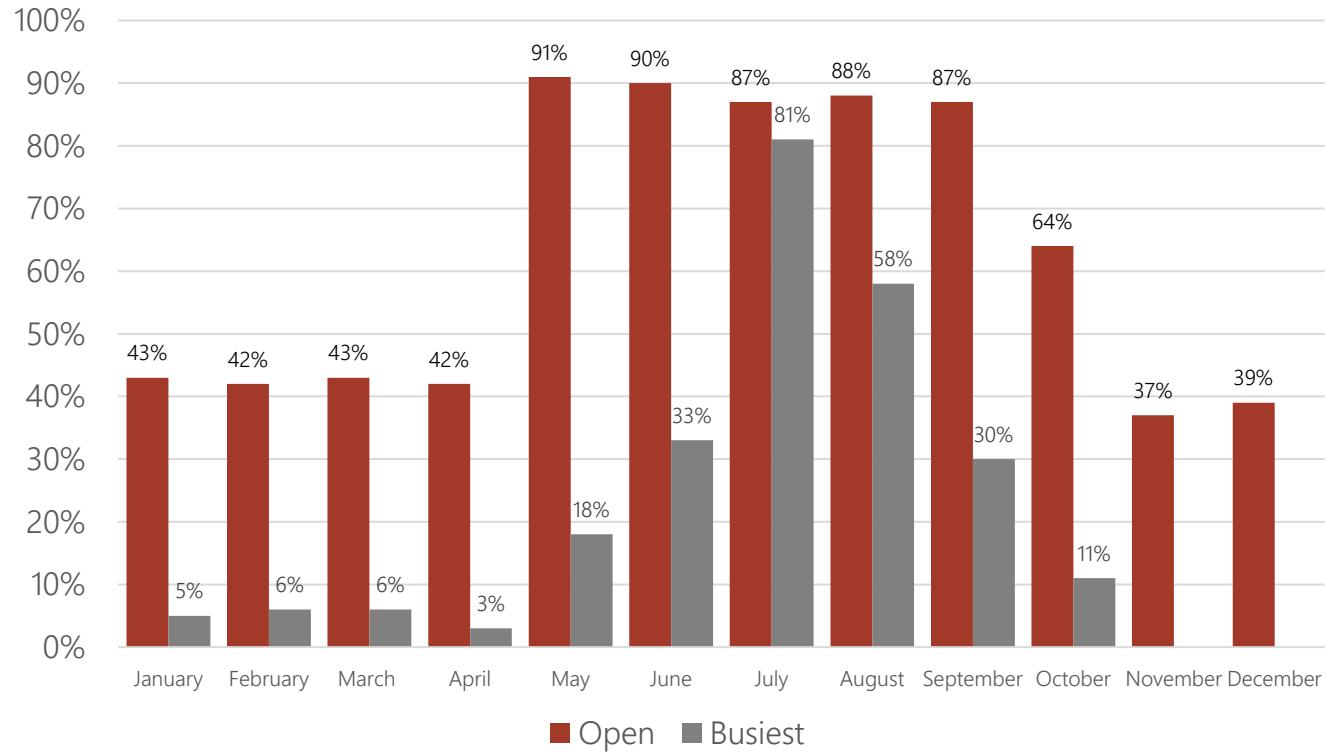


Figure 5 illustrates that most commercial operators and SCOs see their busiest month in the peak season between May and September, while around 40% are open year-round.

Figure 5: Commercial Operator Self Reported Open and Busiest Month



Surveys and Survey Analysis

Approach

The groups listed below were surveyed to help create a better understanding of the amenities and experiences that are important to visitors and to profile the visitors that are currently enjoying Manitoba's Provincial Parks. These surveys were conducted in March and April of 2021. Throughout the surveys, the term "users" is analogous to "visitors." There were four main types of respondents:

- **General Public:** The firm PRA maintains a "Manitoba Panel" that is representative in profile to the general public in Manitoba. The sample was weighed to represent the province's adult population and includes both users/visitors and non-users of Manitoba's parks. A total of 1,655 Manitobans took part in this survey;
- **Businesses & Special Consideration Organizations (SCO):** All businesses and organizations that operate in parks were invited to take part in a survey. Of the 139 organizations invited, 69 completed the survey;
- **Park Staff:** Select individuals who work for Manitoba Parks were invited to participate in a short survey. Of those invited, 18 completed the survey;
- **Park Users:** Individuals who self-identified as park users came from several sources. An invitation to complete the survey was sent directly to a random sample of those who had purchased a park pass and/or made a campground reservation. Cottage associations were asked to distribute an online survey link to their members. A survey link was distributed through Travel Manitoba's e-newsletter and was also available on Manitoba Parks's website. In total, 7,327 individuals responded to the survey;
- **Place Brand Communities:** Travel Manitoba's Place Branding program is a means of growing tourism through increased visitation to distinct destinations within Manitoba. There are currently eleven "Place Brand Communities" in the province, in addition to two routes. This project surveyed six of these communities (all of those located nearby or within a provincial park) and one route to learn about the importance of parks in attracting visitors to their area. Communities and routes surveyed included:

The Whiteshell, The Pas/OCN, Thompson, Flin Flon, Neepawa, Gimli and Beaches of 59 Route.

Seventy-eight percent of those surveyed said that it was extremely or very important to have a provincial park in close proximity to their community to attract visitors to the area.

For analysis purposes, the respondents to the Parks Users survey were combined and then broken into six user types:

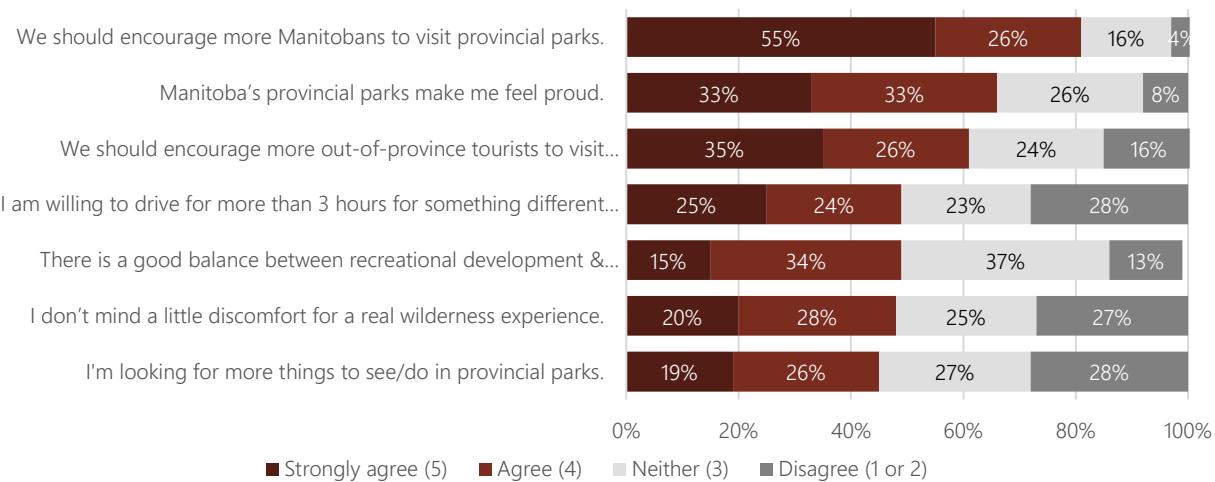
- **Cottage Owners** – individuals who self-identified as owning cottages in parks (n=1,060);
- **Campers** – individuals who self-identified as having camped in provincial parks (n=3,209);
- **Cottage Visitors** – individuals who reported visiting a park and staying in a cabin that they did not own (n=1,262);
- **Day Visitors** – individuals who visited a park for the day, but did not stay overnight in the park (n=1,854);
- **Other Accommodations Users** – individuals who visited a provincial park and used an accommodation other than a cottage or campsite within the park (i.e., hotel, motel, resort, etc.) (n=713);
- **Non-Manitobans** – individuals who travelled to Manitoba and visited a provincial park (n=351).

With the exception of Day Visitors, all other survey respondents may be included in more than one of these user types.

Key results of these surveys are discussed in the sections below.¹

Attitudes to Using Manitoba Parks

Figure 6: Attitude to Parks (n=1,309-1,630)



Generally, there is interest in more activities in parks, and Manitobans want more opportunities to use parks, albeit in a way that continues to conserve and protect our ecosystems.

Most Manitobans (81%) agree or strongly agree that more should be done to encourage Manitobans to visit provincial parks.² Most also agree that we should encourage more out-of-province tourists to visit provincial parks (61%). While, for some, the distance to parks is a barrier, many other Manitobans are willing to drive for more than three hours for something unique and different (49%). Many Manitobans also do not mind a little discomfort for a real wilderness experience (48%) and are looking for more things to see and do in provincial parks (45%). However, only about half (49%) agree that there is currently a good balance between recreational development and natural conservation, which speaks to the tension between these two key elements of Manitoba's Provincial Parks. In spite of this tension, Manitobans generally agree that provincial parks make them feel proud (66%).

When looking at these results by subgroups, only a few are statistically significant. The younger the respondent, the more likely they are to agree that they do not mind a little discomfort for a real wilderness experience (60% of those 18 to 29 years of age agree, compared to 33% of those aged 65 and older). Younger respondents were also more likely to agree that they are looking for more things to see and do in Manitoba's parks (60% of those aged 18 to 29 agree, compared to 29% of those aged 65 and older).

¹ Unless otherwise stated, all percentages presented in this report exclude those who indicated that they did not know. As such, the sample sizes will vary slightly throughout the report. Due to rounding, combined percentages in the text may differ by +/- 1% from the addition of individual percentages presented in the charts.

² The question read: Q104, Q107-Q111, Q113. Please rate your level of agreement with each of the following statements. Please use a scale of 1 to 5, where 1 means you strongly disagree and 5 means you strongly agree.

Cottage visitors (68%), campers (69%), and users of other accommodations (70%) were more likely than other types of visitors to agree that they would be willing to drive more than three hours for something different or unique. Cottage owners were the least likely to report that they are looking for more things to see or do in provincial parks (27%). Among other Manitoba visitor groups, 42% or more were looking for more things to see or do.

Profiles of Park Visitors

On average, the typical Manitoban had visited nine different provincial parks in their lifetime. Cottage Visitors³ and users of Other Accommodations had visited the most parks on average (12). Regardless of type, visitors were most likely to visit parks in the summer months, followed by the fall and spring. Cottage Owners were the most likely to visit the parks in any season. While visits to parks were less common in the winter, many Manitobans (about 25% of the general public) reported visiting a provincial park during the winter months. Among the various user groups, winter visits ranged from 36% (Day Visitors) to 72% (Cottage Owners). Other than Cottage Owners, it was those using Other Accommodations who reported visiting most often in all seasons (e.g., 63% reported visiting a provincial park in the winter). This likely reflects the fact that lodges, resorts, hotels, etc. are available year-round.

Understanding the demographics of park users and visitors is important in ensuring that recommendations for future activities align with the future interests of park visitors. By understanding current and future park-user demographics, interests and expectations, Manitoba Parks can better work to meet these expectations. Different types of park users have different demographic characteristics.

Age

Table 1 Average Age of Visitor/User by Category In Manitoba

Group	Average Age
Cottage Owner	61
Non-Manitoban	55
Day Visitor	53
General Public	49
Other Accommodations	49
Camper	48
Cottage Visitor	47

The average age of a Park Visitor⁴ varies based on grouping/category, with Cottage Owners having the highest average age of 61 and Cottage Visitors⁵ having the youngest average age of 47 (see 2 adjacent).

Among the general population, 56% of adult Manitobans are 45 or older. Campers (57%), Cottage Visitors (57%), and users of Other Accommodations (61%) are the most similar in age to the general public. Day visitors (73%) are 45 years of age and older; non-Manitobans (77%) and especially Cottage Owners (91%) tend to be older.

Household income

Among the general public, 37% of Manitobans have a household income of \$100,000 or more. Most park users tend to have incomes higher than the general population. About half or more of park visitors categorized as Cottage Owners (56%), Non-Manitobans (53%), Other Accommodations users (52%), Cottage Visitors (51%), or Campers (47%) have a household income of \$100,000 or more. Day Visitors come closest to reflecting the average

³ References throughout the Survey section that identify categories within the survey are capitalized. (example: Cottage Visitors).

⁴ For the purpose of this survey "Visitors" roughly equates to "Users"

⁵ Cottage Visitors are individuals who stayed in or visited a cottage they did not own.

household income of the general population, with 39% reporting an income of \$100,000 or more. Overall, while visitors to Manitoba Parks come from diverse economic backgrounds, current users tend to have a higher-than-average income.

Household members

Among the general public, one in four (25%) report having children under the age of 18 in their household. Campers (37%) are the most likely to report children under 18 in their household, while Cottage Owners (13%) are the least likely to report the same.

Other characteristics

According to the survey of the general public, 57% of Manitobans have lived in the province their whole life. An even greater percentage of park users can say the same, ranging from 59% of Day Visitors to 65% of Cottage Owners reporting to have lived their whole lives in Manitoba. Although under-reported in the survey, 9% of the general population self-identified as a visible minority. Interestingly, except for Cottage Owners (4%), those who identify as a visible minority appear to be as active in parks as other Manitobans, ranging from Cottage Visitors (8%) to users of Other Accommodations (12%).

Summer vacation

While only six in 10 (59%) of the general public report regularly taking a summer vacation, those who visit provincial parks are more likely to report taking time off in the summer. This ranges from Day Visitors (67%) to Campers (84%). Interestingly, although the typical Cottage Owner spends most of the summer at their cottage, only seven in 10 say they take a summer vacation; this suggests that, for some, their cottage is more a second home than a vacation destination.

Perceptions of Parks

The study asked respondents to rate their agreement with three statements as to the purpose of provincial parks.

- About two in three (67%) Manitobans agreed or strongly agreed that **conservation and preservation of ecosystems** is the primary purpose of provincial parks;
- About half (48%) agreed that the primary purpose of parks is **recreation**;
- Three in 10 (28%) agreed that the primary purpose is **education and interpretive programs**.

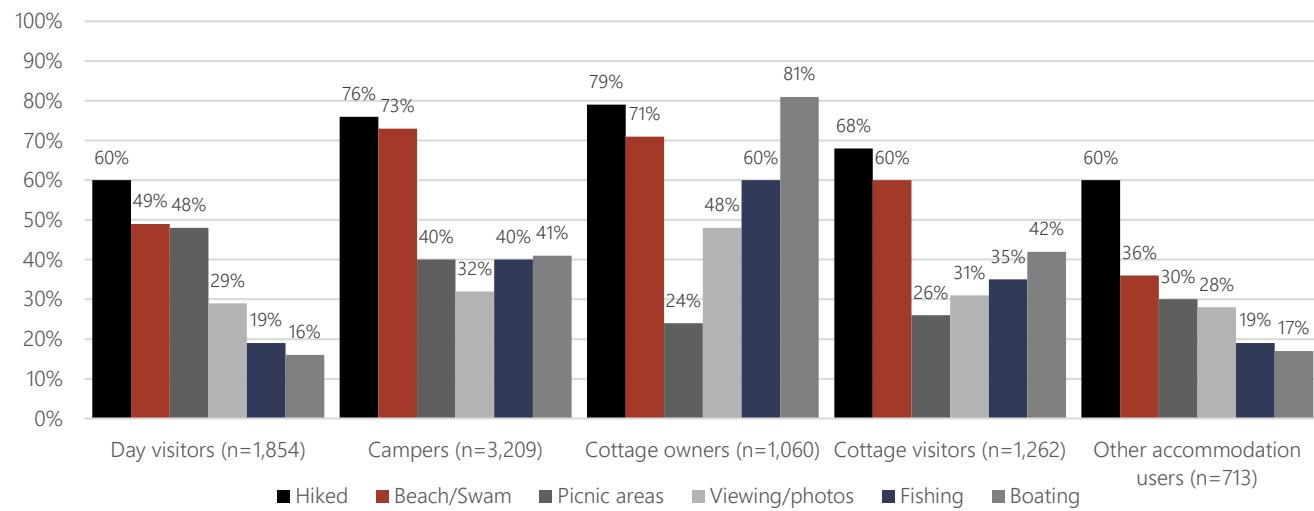
Balancing these priorities under a new strategy will be an important success factor.

Activity

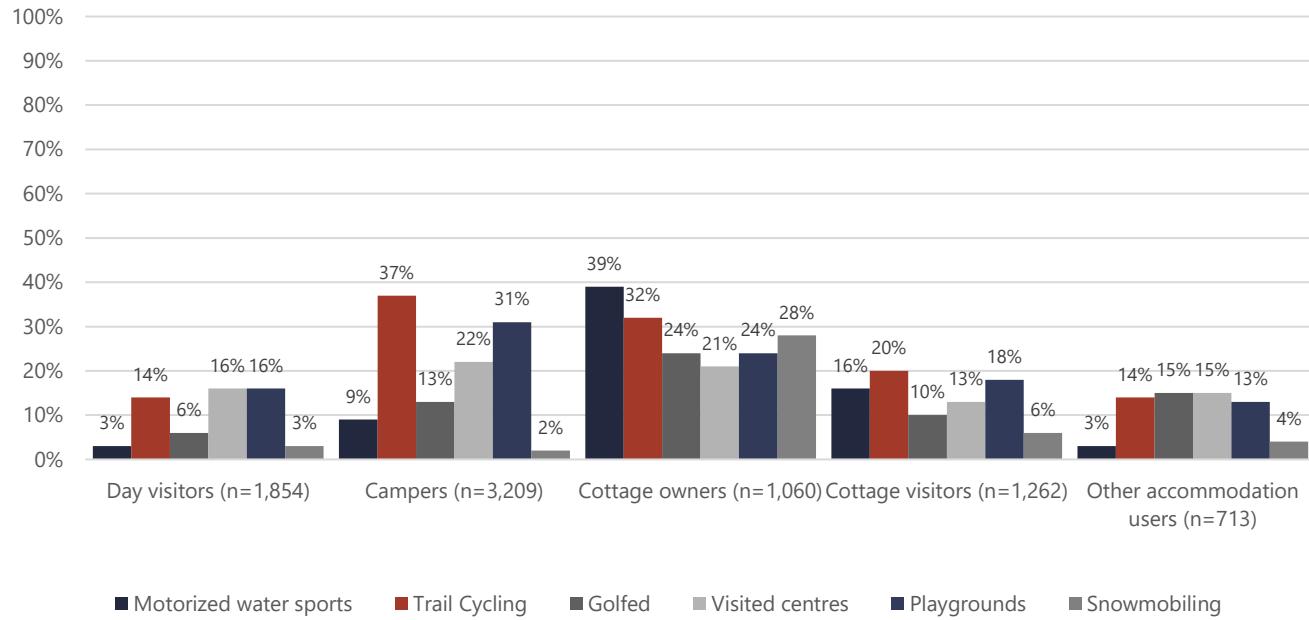
The most common activity across five Park Visitor groups was hiking. Cottage Owners were slightly more likely to report having boated, but hiking followed closely behind. Use of the beach or swimming was the second most common activity among most groups. Using picnic areas, fishing, birdwatching, animal viewing or photography (i.e., viewing/taking photos), and boating were also quite common among all groups. These activities are likely the most common because they are summer activities and therefore benefit from higher summer visitation rates (Figure 7).

The fact that activities vary by group may simply reflect the amount of time a visitor-type spends in parks. Day visitors have limited options to extend their stays, which may present an opportunity to provide more options to encourage this group to stay longer in the parks they visit.

Figure 7: Most Common Activities of Interest by Park Visitor Group



Activities with less participation included snowmobiling, motorized water sports, attending visitor and interpretive centres and using playgrounds. The lack of participation in these activities may be attributed to cost, lack of equipment, the fact that some occur during park off-season, and misalignment with visitors' interests (see Figure 8 on the following page).



⁶Figure 8: Most Common Activities of Interest by Park Visitor Group (continued)

⁶ Visited Centres: Visited interpretive centres, museums, heritage sites or historic sites

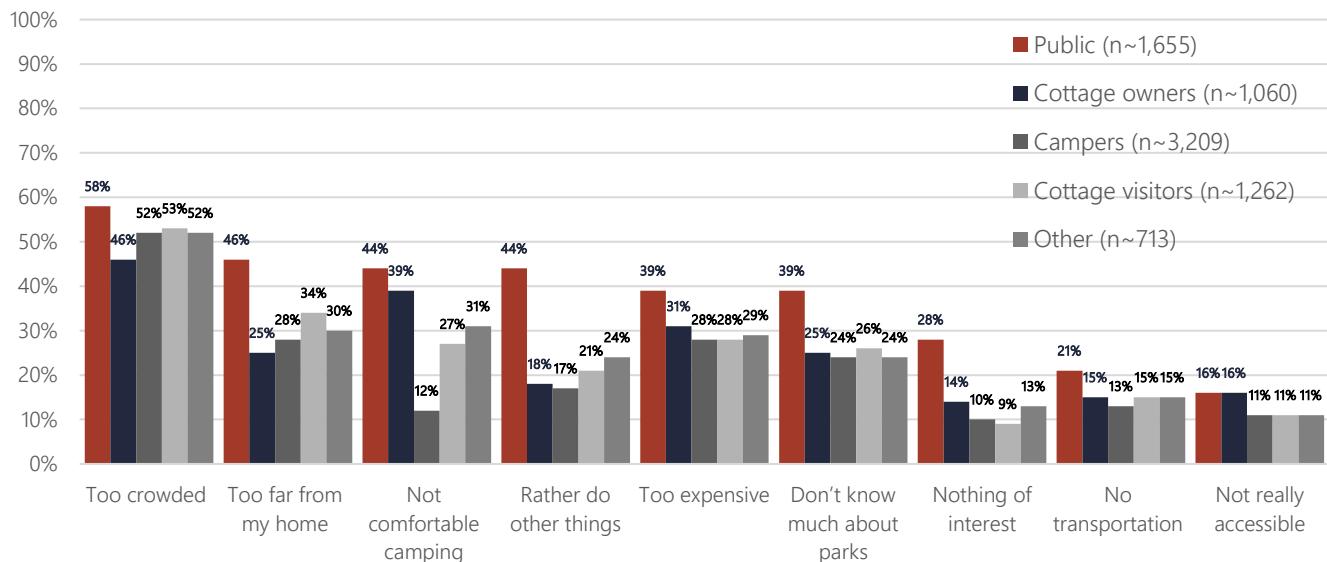
Barriers to Park Visitation

In the next analysis, respondents were asked to rate their level of agreement with a series of statements that may be considered barriers that prevent them from visiting Manitoba's Provincial Parks, or at least visiting them more often.

Overcrowding

According to current park visitors, the leading barrier to park visitation is overcrowding. Regardless of respondent type, this is the most common barrier, which likely reflects the fact that there is high park use during the summer months and, in particular, key weekends when all groups typically visit parks. It is unclear whether this overcrowding is a perception or based on real experience. Either way, the belief that parks are often too crowded to be enjoyable may prevent visitation, especially on days expected to be particularly busy. For others, it may not prevent a visit, but rather encourage them to visit different parks or areas within parks that they suspect might be less crowded. See Figure 9 below for a breakdown of factors that respondents identified as barriers to park visitation.

Figure 9: Barriers to Park Visitation



Reflecting the fact that this sample of the general public included some who have not used provincial parks, it is not surprising that, in almost all cases, these respondents were more likely to identify barriers compared with those who were users. For example, the general public was significantly more likely to agree that parks are too far from their homes and that they would rather do other things if they were not users, regardless of visitor type.

Not Comfortable Camping

One barrier to higher usage of campgrounds in provincial parks was the simple fact that 44% of the general public did not feel comfortable camping. Indeed, except for campers themselves, many other user types also reported this as a barrier, which likely reflects how they currently utilize provincial parks.

Cost

While the general public was the most likely to indicate that the cost of visiting provincial parks is a barrier (39%), it was fairly common among all visitor types (ranging from 28% to 31%).

Don't Know Much About Parks

Many among the general public admitted that they do not know much about parks, their locations, or their offerings (39%). This lack of knowledge also drove their perceptions of parks and the other barriers; those who agreed they did not know much about parks were also more likely to agree with all the other barrier statements. This suggests that more needs to be done to educate Manitobans about where Provincial Parks are situated and what they have to offer.

Manitobans tended to have different reactions to some of these barriers depending on their age or household income.

- **Age.** Among older respondents, the barriers were more often related to lifestyle choices; they felt that parks were not a priority, or their offerings were not attractive. For younger respondents, the barriers mostly spoke to accessibility. Older respondents were more likely to agree that they would rather do other things with their free time than visit parks (52% of those 65 or older agreed), and they did not feel comfortable camping (59% of those 65 or older agreed). Age itself was a barrier, as those 65 or older were much more likely than younger respondents to indicate that physical or health-related reasons kept them from parks (24%). For the youngest age cohort (18 to 29 years of age), the barriers were more practical: parks were too far from their homes (60% agreed) and they did not have transportation to and from parks (36%);
- **Household income.** The lower the household income, the more likely respondents were to identify these as barriers: provincial parks were located too far from their homes (62% of those with a household income of under \$50,000 agreed) and they did not have transportation to and from parks (41%).

General Awareness and Use

Regardless of visitor type, respondents were most likely to visit parks in the summer months, followed by the fall and spring. While visits to parks are less common in the winter, many Manitobans (about 25% of the general public) reported visiting a provincial park in the winter months.

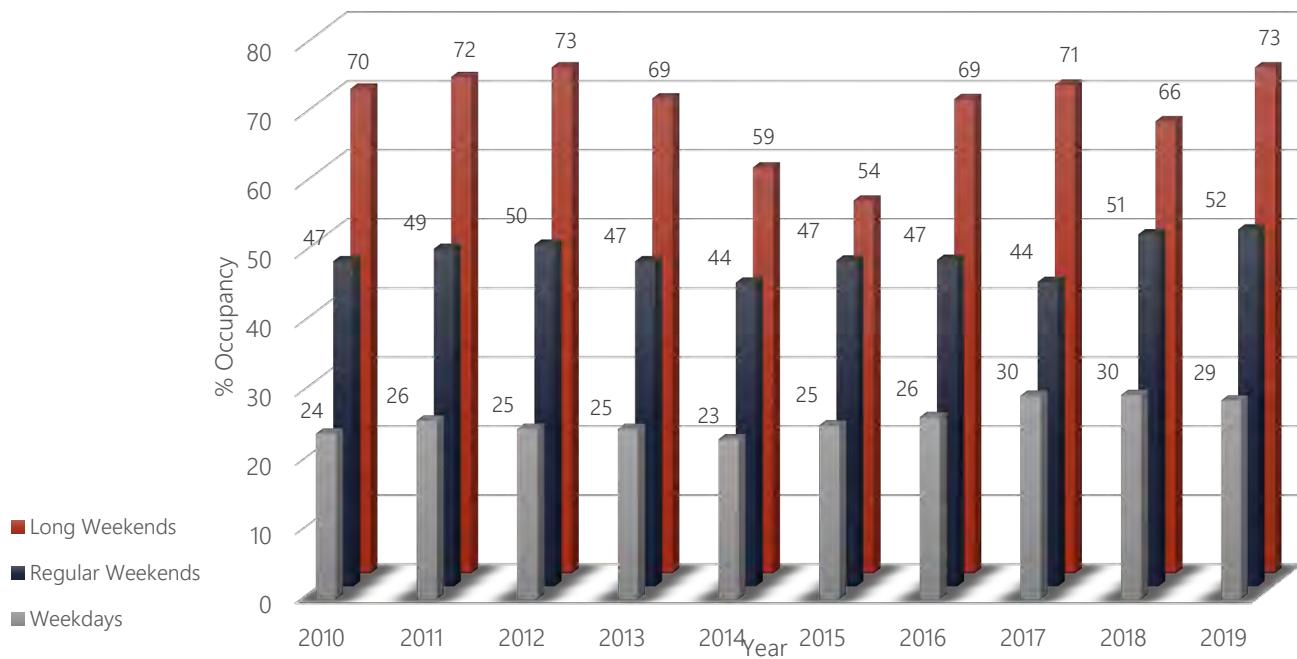
There is a great variation in the use of/traffic throughout Manitoba Parks. Many park campgrounds often reach or exceed their capacity during the summer months, while others receive few visitors throughout the entire year.

Figure 10 (on the following page) shows the provincial average occupancy rate from 1990 through 2019. Overall, Manitoba's major Provincial Parks and campgrounds are a highly utilized public service.

According to Manitoba Parks statistics, the average occupancy across all Provincial Park campgrounds from 1990 to 2019 was 33.9%. This number may appear low due to the underutilization of Parks campgrounds during the weekdays, as parks are disproportionately used on weekends, especially long weekends (as shown in Figure 10).

Figure 10 also shows the level of average annual utilization each year from 2010 and 2019, separated into long weekend utilization, weekend utilization and weekday utilization.

Figure 10: Park Campground Occupancy 2010-2019



Except for 2014 and 2015⁷ long weekend occupancies, park campground utilization rates have remained relatively consistent over the past ten years, indicating that Manitobans' interest in parks remains constant from year to year. It also suggests that capacity has been reached and that further investment into campsites is required to facilitate growth. Anecdotally, it is believed that poor weather contributed to low long weekend occupancy in 2014 and 2015, which illustrates market sensitivity to environmental factors. The summer of 2014 only had five (5) days above 30 degrees Celsius,⁸ while the summer of 2015 saw a large storm over the May long weekend; tornadoes throughout July; and severe thunderstorms and heavy rain in August.⁹

Visitor Satisfaction

Visitor satisfaction was evaluated both to determine the current state of satisfaction among Park Users and to identify potential areas of improvement. Satisfaction was evaluated on a user-group basis to identify specific areas of improvement.

Park Passes

To access Manitoba's Provincial Parks, vehicles require a park pass. These permits cost \$9.50 for the day, \$16.50 for three consecutive days, or \$44.50 for the year. When asked how survey respondents would rate the value of each of these passes, three in four (74%) Manitobans said the annual pass was of good or excellent value; nearly half (46%) thought the casual, three-day pass was of good or excellent value; and approximately one in three (35%) rated the day pass as being of good or excellent value.

⁷ 2015 occupancy totals do not include group use or yurt unit nights.

⁸ <https://www.aweathermoment.com/2014/09/05/state-of-the-climate-meteorological-summer-of/>

⁹ <https://www.aweathermoment.com/2016/03/01/winnipeg-areas-top-10-weather-stories-of-2015/>

Campers

This sample was made up of experienced campers, who had typically camped for 27 years. Most (six in 10) reported that they had been camping for over 20 years, whereas just 2% were new campers, reporting they had been camping for just one year. Most campers said that their main reason for camping was to relax and get away (33%), or to spend time with family and friends (33%).

Most campers reported using the online advance camping reservation system to reserve a campsite in a Manitoba Provincial Park. Approximately half of campers (53%) who used the reservation system had experience using it on opening day. About three in 10 campers (29%) reported being satisfied with the online reservation system on opening day; most others were dissatisfied (46%). However, on other days, the majority (73%) of campers reported being satisfied with the campground reservation system. It is unclear if those who did not use the system on opening day did so purposely to avoid a poor experience.

Most campers chose a campground based on past experience and familiarity (68%). However, many reported other factors influencing into their choice, including access to a beach or lake (48%), the quality of campground amenities (46%), and other amenities at or near the campground (47%).

Figure 11: Campsite Services Visitors Wanted vs. Campsites Visitors Were Able to Get

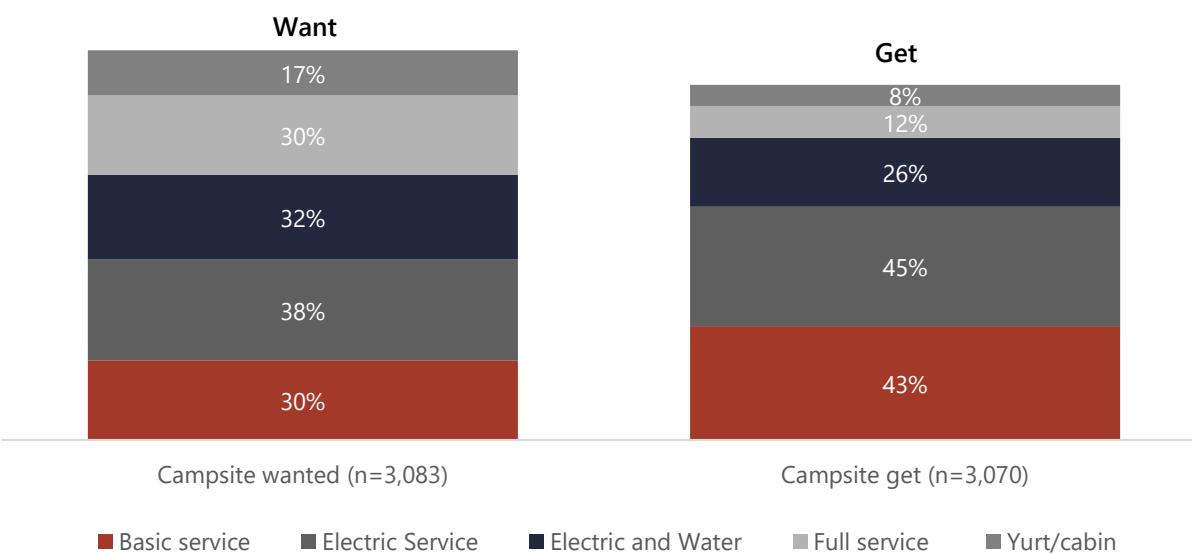


Figure 11 shows there is a clear gap between the types of sites campers wanted and the type of sites they typically obtained.¹⁰ Demand appeared to outstrip availability for three types of campsites: yurts, full service, and sites with electric and water. The largest gaps were between those who wanted a yurt (17%) and those who ended up with one (8%), and those who wanted a full-service site (30%) and those who secured one (12%).

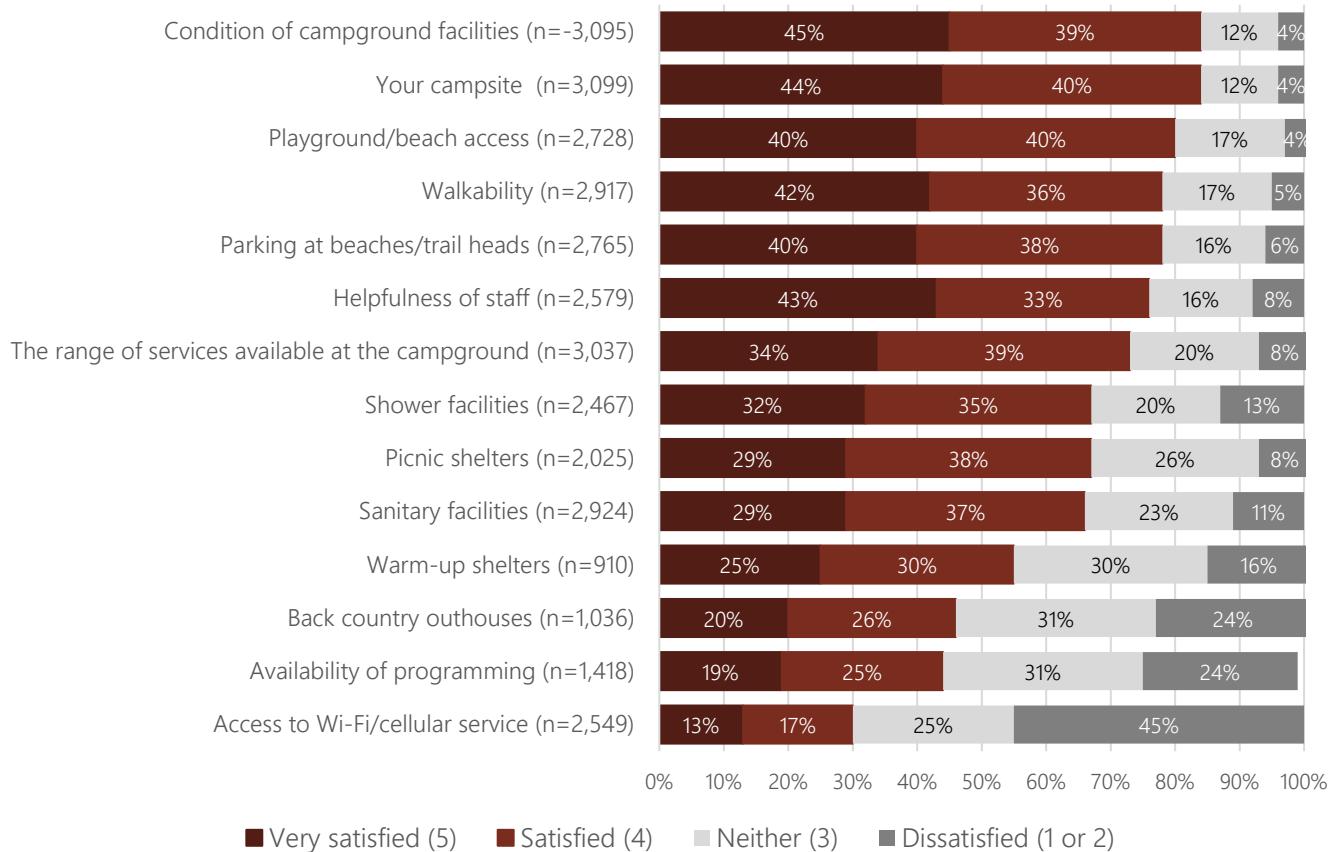
Conversely, many campers are relegated to an undesirable campsite because their preferred choice was not available: fewer wanted an electric-only (38%) or basic (30%) campsite than obtained one (45% and 43%, respectively).

¹⁰ The question reads: Q24. What type of campsite do you typically WANT and what do you typically end up GETTING when camping in a Manitoba provincial park?

It should also be noted that not only did some users not get the type of campsite they wanted, but over one in three (37%) reported they selected the campground only because it had sites available on the days they wanted or that there was simply no other choice.

Satisfaction with certain other services campers experienced tended to be better. Over 70% of survey respondents were either satisfied or very satisfied with half of the 14 services listed in Figure 12 below¹¹.

Figure 12: Campsite Satisfaction



When asked about overall satisfaction, 89% of campers responded that they were very satisfied or satisfied; 79% felt the camping experience was of a good or excellent value for what they paid; and 72% were promoters who would actively recommend camping in a Manitoba Provincial Park to other campers. This shows that although campers may not be able to find the type of campsite they want, the camping experience currently offered generally meets their expectations. The area that had the highest level of dissatisfaction is the access to WiFi and/or cellular service, which suggests that investigating methods to improve this service should be a priority.

¹¹ The question read: Q28-39. Thinking of your last camping experience in a provincial park, please rate your satisfaction with the following services

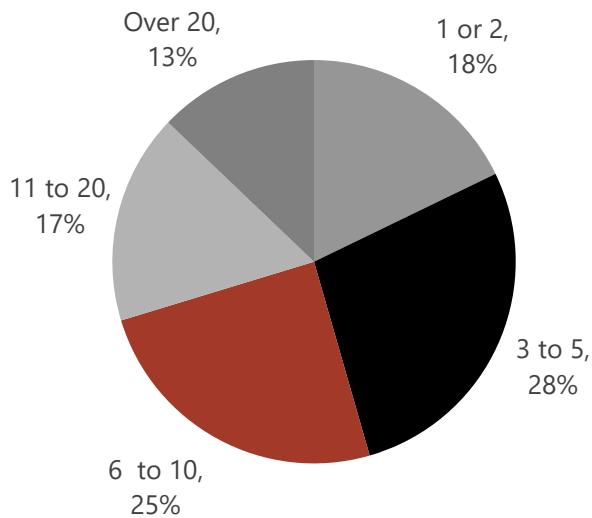
Day Visitors

On average, day visitors visit Manitoba provincial parks 12 times a year. Twenty-eight percent of respondents said they visit parks three to five times a year, while 13% reported visiting parks over 20 times a year. Most park visitors are repeat customers, proving that they enjoy the current park experience. Figure 13 shows the complete breakdown of how many times Day Visitors visit parks in a year¹².

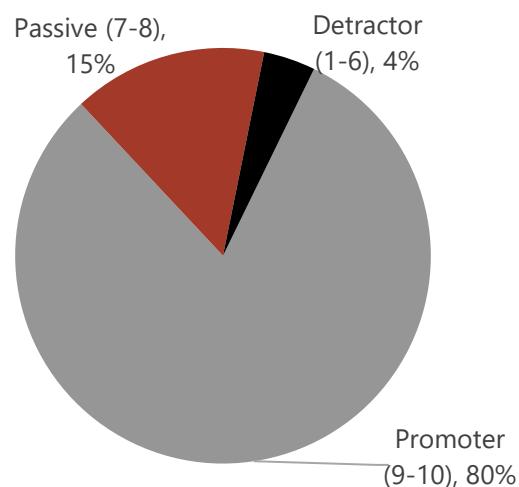
The fact that respondents visit parks frequently was reflected by the fact that almost six in 10 (58%) reported buying an annual park pass, allowing them unlimited access to provincial parks.

Overall, Day Visitors appeared to be satisfied with the current service levels provided by parks, as 80% were promoters who would actively recommend visiting a provincial park to a friend (Figure 14).¹³

*Figure 13: Number of Times Day Visitors Visited Parks per Year
(n=1,585)*



*Figure 14: Would Day Trippers Recommend a Park to a Friend
(n=1,846)*



¹² The question read: Q9. Please estimate the total number of day trips you took to any provincial parks in Manitoba. Day trips are when you visited Manitoba provincial parks but did not stay overnight in the park.

¹³ The question read: Q14, How likely are you to recommend a day trip to a Manitoba provincial park to friends and family? Use a 0 to 10 point scale, where 0 means definitely would not recommend and 10 means definitely would recommend.

Other Accommodations

While, on average, individuals who stayed in a Manitoba Provincial Park at an accommodation other than a campsite or cottage had been doing so for 10 years, a significant percentage of these individuals had actually been doing so for over 20 years. In fact, most (60%) had been visiting Manitoba Provincial Parks and using other accommodations for five years or less (including 26% of respondents who were new to staying in other accommodations). Figure 15 shows the breakdown of respondents and how long they had been staying in other accommodations at Manitoba Provincial Parks.¹⁴

On average, these visitors made almost two trips to a provincial park in a year, staying in a hotel, motel, resort, or lodge. About two in three (67%) made just one trip. Typically, visitors stayed in these types of accommodations for almost four nights.

When asked about their most recent experience, 70% of respondents said they received good or excellent value for their money, while 25% selected neither good nor poor value, and 57% of respondents were promoters who would actively recommend other accommodations to a friend. (Most others were passive, suggesting that they would not go out of their way to promote, but they also would not say anything negative.) This suggests that individuals who attend parks and stay in other accommodations are generally happy with their overall experience.

Non-Manitobans

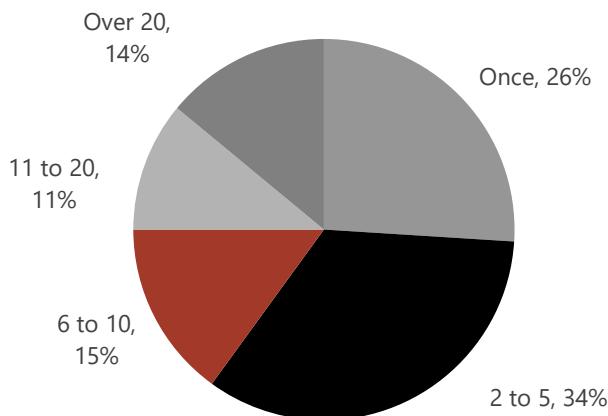
Non-Manitobans used provincial parks in a variety of ways, although most reported staying overnight (62%). While some reported camping (34%) or staying in other accommodations (5%), other non-Manitobans staying overnight visited their own cottage or that of a friend or family member (25%). A few reported renting a cottage in a park (3%).

Non-Manitobans found their experience in Manitoba parks to be enjoyable, with 77% actively recommending a day trip to friends and family and 74% saying that they would actively recommend camping in the park. This illustrates that non-Manitobans who visit Manitoba's Provincial Parks find the experience enjoyable and would encourage others to visit.

Cottage Visitors

Cottage visitors include those who rented a cottage or stayed at a family member's or friend's cottage. Many rented a cottage themselves (42%) or visited friends or family who were renting a cottage (20%). Others visited cottages owned by friends (40%) or family (36%).

Figure 15: Number of Years Visitors Have Stayed in Parks (n=623)



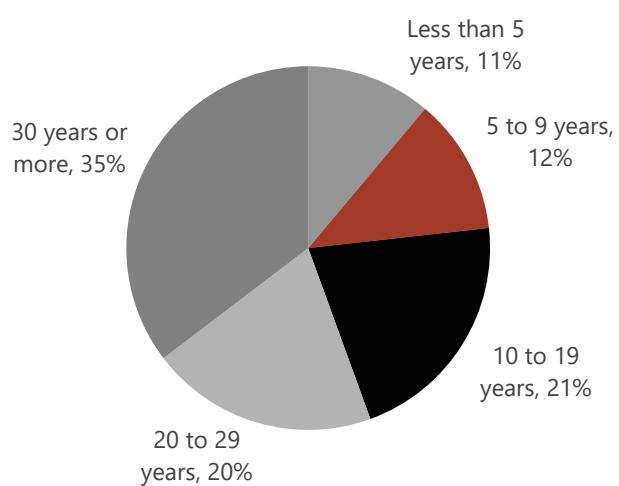
¹⁴ The question read: Q65. *In total, for about how many years have you visited a provincial park and also stayed at a hotel, motel, resort, or lodge within the park?*

When asked about overall satisfaction, 83% of cottage renters said that the cottage was excellent (46%) or good (37%) value, while 65% are promoters who would actively recommend renting a cottage in a Manitoba Provincial Park to a friend. Cottage visitors appeared to be predominantly happy with their renting experience.

Cottage Owners

Cottage owners are a unique group of park users who own cabins within the parks. Most cottage owners are on properties with long-term leases from Manitoba Parks, with a small group on privately owned land titles. They enjoy the same park experiences as the other user groups, including recreation (beaches, playgrounds, programming, etc.) and facilities (boat launches, concessions, roads, etc.), while also utilizing municipal services (water, sewage, garbage removal, etc.) provided by Manitoba Parks. Cottage owners while on their own property are cottagers, a unique and independent user group. While at their cottage, they largely entertain themselves and are not requiring the "recreational assets" of the park. However, once a cottager leaves their property, they become a park visitor much like any other, using the same recreational and park facilities and resources as a camper, day-tripper or other accommodation user.

Figure 16: Number of Years Cottage Owners Have Owned Their Cottage (n=1,038)

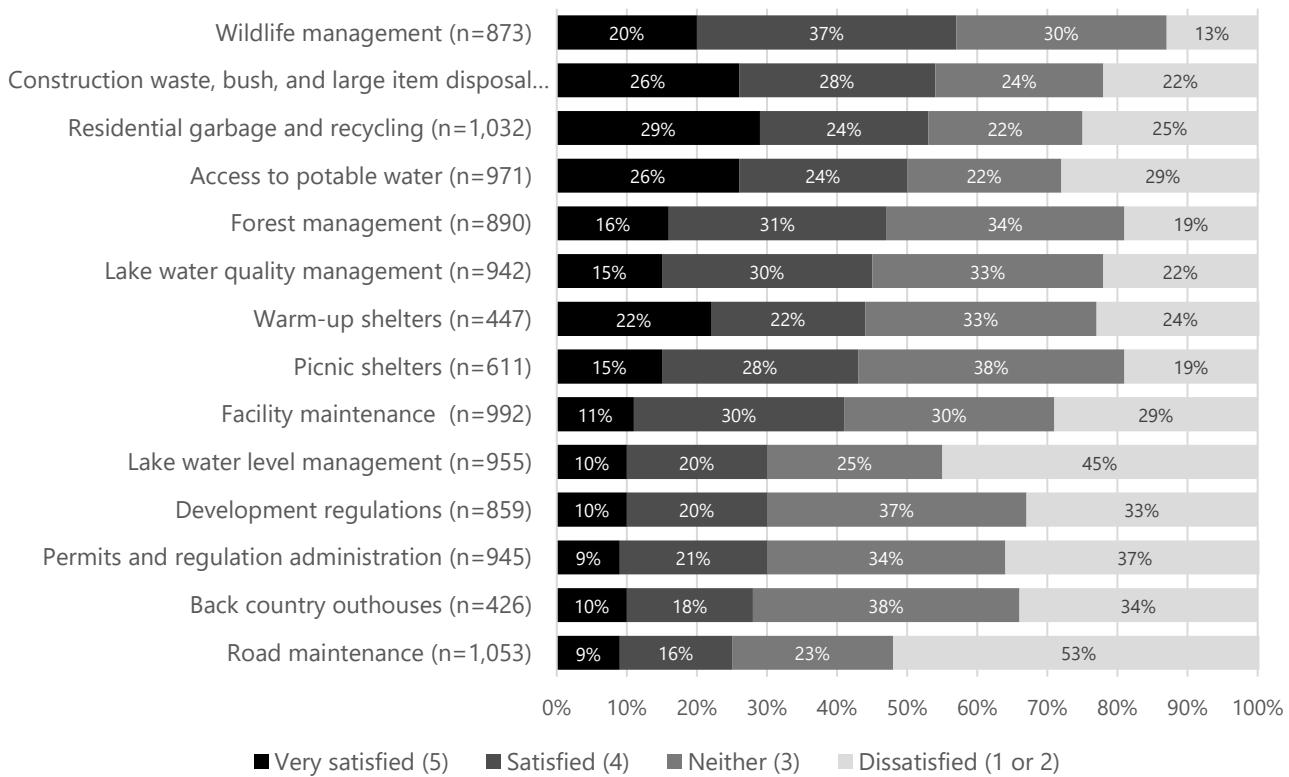


On average, respondents had owned their cottages for 24 years, with over half (55%) reporting that they had owned their cottage for 20 years or more. Figure 16 shows the percentage of cottages owned by length of time.¹⁵

From a cottage owner's perspective, provincial park services can be improved in various areas, as shown in Figure 17. Of the 14 services listed, only three received more "very satisfied" or "satisfied" responses than "neither" or "dissatisfied" responses.

¹⁵ The question read: Q45. You indicated that you have your own cottage in a provincial park. For how many years have you owned this cottage?

Figure 17: Satisfaction Level with Cottage Services



When asked about value for money for lease fees, 39% of cottage owners said they received excellent or good value, while 32% felt they received poor value for money, and 29% felt that they received neither good nor poor value. When asked about value for money in relation to service fees, 47% felt they received poor value, while 26% felt they received excellent or good value for their money. While, overall, it appears that the typical cottage owner may not be satisfied with their current situation in terms of service or value, their perceptions do not appear to be a barrier to cottage use. Indeed, the typical cottage owner spends 106 nights or three months, at their cabin annually.

Park Reservation System

Survey questions focused on the ability of respondents to successfully book a campsite or other Manitoba Parks-operated accommodations (yurts, etc.), but news articles and media coverage indicate that there is a general dissatisfaction with the reservation system used by Manitoba Parks. One user was quoted in the Winnipeg Free Press as saying, "I truly despise Manitoba Parks reservation system."¹⁶

Issues mentioned included:

- High demand results in users waiting in long online queues and using multiple devices to secure desired sites and dates;
- Low cost and limited supply of fixed-roof accommodations (yurts, cabins, etc.) make booking difficult;
- High demand for long weekends can result in limited options for campsites;

¹⁶ Rollason, K. (2021, April 12). Campsite reservation system bogged down with booking. *Winnipeg Free Press*.

- Reservations for the entire summer open on the same day, meaning that potential users need to know when and where they hope to camp long in advance;
- The reservation system requires users to know which park(s) they want to visit before booking, which, combined with the difficulty to navigate Parks's website, means people familiar with the system have an advantage/creates barriers for new visitors (domestic and international).

The system's flaws are well known. Through Engage Manitoba, the Provincial Government's public engagement platform, input on desired changes to the Parks Reservation Service is currently being sought. A new system is expected to be in place for the 2023 season.¹⁷

Park Foundation

We asked Manitobans whether they would support the idea of the development of a foundation or non-profit organization that could receive donations which could be used on such things as conservation, improving existing services, and investing in new services and attractions in Manitoba's Provincial Parks. A majority of Manitobans (55%) supported the idea, while most others said they neither agreed nor disagreed (15%) or did not know (9%), possibly because it would depend on the precise roll-out of such a foundation. A few disagreed with the idea (13%).

When asked how likely they would be to donate to such a foundation, Manitobans were split, with almost three in 10 saying that they would donate (27%) and three in 10 saying that they would not (31%). Most others said that they might, but it depends (31%).¹⁸ Among the various Park user groups, the percentage of those who say that they would donate is similar and ranges from 23% (non-Manitobans) to 29% (Cottage Visitors and Other Accommodation users).

Partnering to Build New Facilities

We asked participants whether they would support the province partnering with an external organization to build new facilities in some parks. Among the public, almost four in 10 (38%) would support such a partnering. About one in three would oppose this type of partnering (28%), and a similar number said it would depend on the nature of the partnership and the projects involved (28%).¹⁹

Park Utilization Varies Significantly

The utilization of park campgrounds is a good measure of how available capacity serves demand. Campground utilization is measured as the number of campsites available over the number of days (shown in the table on the following page, divided into long weekends, weekends, and weekdays) throughout the season divided into the number of nights each campsite was occupied in a year. For example, if, on average over the available weekends the campground was open during the season, the number of nights campsites were occupied was half of the total available nights, then the campground is considered to have been 50% utilized. There is a significant variation in the utilization rate of different parks. The parks with the highest campground utilization in 2019 are shown in Table 2, while parks with the lowest utilization in 2019 are listed in

Table 3.

¹⁷ Staff writer. (2021, September 28). Manitoba aims to improve outdated and much-maligned campsite reservation service. *CBC News*

¹⁸ The remaining 11% said they did not know.

¹⁹ The remaining 7% said they did not know.

Table 2: 2019 Parks with Highest Utilization

Parks	Campground Occupancy (%)			
	Total	Long Weekend	Weekend	Weekday
Winnipeg Beach	73	95.4	87.9	64.4
Whiteshell – New Nutimik	66.5	91.2	78.6	58.7
Nopiming – Tulabi Falls	59.4	93.5	82.0	46.5
Rivers	57.2	99.8	76.7	44.2
Bakers Narrows	57.0	63.0	64.4	53.6
Nopiming - Shoe Lake (back-country boat in)	54.8	91.7	76.3	41.8
Whiteshell - Falcon Lakeshore	52.2	80.2	71.3	41.2
Clearwater - Campers Cove	51.4	55.3	57.6	48.6
Birds Hill	50.8	87.6	71.5	38.2

Table 3: 2019 Parks with Lowest Utilization

Parks	Campground Occupancy (%)			
	Total	Long Weekend	Weekend	Weekday
Primrose Wayside	2.0	2.8	1.9	2.0
Lake St. George	2.7	11.9	4.9	0.6
Duck Mountain – Singush Lake	6.2	26.7	5.4	3.3
Turtle Mountain - Max Lake	6.5	27.8	8.6	2.7
Nopiming – Beresford	10.8	42.1	14.4	4.6
Norris Lake	12.5	50.0	18.8	4.8
Paint Lake – Lakeview	13.1	32.4	15.0	9.4
Grass River - Reed Lake	19.0	8.3	22.6	19.5
Porcupine Forest - Bell Lake	20.9	35.4	25.5	17.1
Moose Lake	21.9	69.1	33.8	10.5

At the extremes of the above tables, Winnipeg Beach had the highest overall utilization of their campground, with 73% occupancy, and Primrose Wayside's campground was the least utilized, at 2% occupancy. Many of the campgrounds with very low occupancy levels rely on self-registration and have very limited services.

Best Practices & Trends

Globally, access to nature is seen to be both a public good and an economic driver for rural and remote areas. This study looked at park systems in Canada, the United States, and select locations around the world to understand how different jurisdictions operate and deliver quality value to visitors of their parks. Jurisdictions took a wide variety of approaches to deliver their mandates, while generally sharing the common purpose of connecting people to nature while protecting and conserving those same natural features.

Through a mix of interviews, email correspondence, and desktop research, park systems from the following jurisdictions were analyzed to inform the best practice research:

- Ontario
- Québec
- Alberta
- Saskatchewan
- Parks Canada
- Minnesota
- North Dakota
- South Dakota
- New Zealand
- Australia
- Finland
- Sweden
- Estonia
- Netherlands
- Germany
- United Kingdom
- Scotland

Best Practice research was divided into three (3) tiers of depth of research and analysis. "First Tier" research included both desktop research and at least one interview. "Second Tier" research was conducted through online desktop research with additional questions by email. "Third Tier" research was conducted exclusively through online desktop sources.

This approach was taken to prioritize efforts on jurisdictions most similar, either legislatively or geographically, to which the research team had reasonable access. Initial interviews were conducted for all First-Tier jurisdictions, and subsequent follow-up interviews were conducted where additional insight on specific topics was required. Teams asked questions that addressed topics such as their marketing efforts, what attracts visitors, how they manage the visitor experience, aspects of their administration and operating models, and some aspects of their financial situation and financial management.

Focus on Management and Access to Natural Assets

The core "products" for which park systems are responsible around the world remain the same: the natural landscapes, physical features, and cultural histories of their parks. The conservation and management of these natural assets to protect their inherent and economic value for current and future generations is an essential responsibility of park systems globally. Conservation can be thought of in two main categories:

- Restriction of access and usage to preserve natural assets; and
- Management of access and use to encourage positive experiences that connect citizens with nature.

Wilderness parks, ecological reserves, and undeveloped protected spaces fall into the former category, whereas recreation parks and ecotourism destinations fall into the latter.

For example: the sustainable use and enjoyment of parks by Australians and international visitors to ensure ongoing use that does not degrade natural assets or impact future use is a stated goal of the Australian National Park system.

"Papatuanuka Thrives" is the overarching purpose of the New Zealand park system, which roughly translates to "nature thrives" and is guided by the principles of working together, fulfilling Treaty partner relationships, and leaving the world a better place. Through this purpose, New Zealand positions their parks and protected spaces not only as natural assets with potential economic value, but also as core responsibilities of the nation. The recognition that natural landscapes and species draw local and international visitors to park lands and waters "is a significant part of New Zealand's tourism appeal." Their system has a focus on storytelling, which is achieved by working with Treaty partners to tell the integrated stories of nature and history.

Marketing & Use of Technology

The marketing of parks and the use of technology by parks departments have evolved rapidly over the last 20 to 30 years. Marketing practices that were common decades ago, like putting up booths at a trade show, are now rarely used, while the use of "social media influencers" would have made little sense at all in the past. The most successful parks systems have modernized to provide high-quality marketing and online tools that draw visitors and make trip planning easy.

Branding & Marketing

When visitors plan trips to countries like Australia and New Zealand, it is likely that their travel itineraries include a stop in a national park. These governments have invested millions of dollars in branding and marketing to showcase their parks to the world, through highlights like New Zealand's "Great Walks." Closer to home, notable park organizations such as Parks Canada, Ontario Parks, and Sépaq (Québec Parks) have also succeeded at developing and marketing distinct brands for their park systems that communicate their values and identity. In addition to clearly communicating their value when someone is in a park or looking at a park's product, many of these parks systems have also created new revenue streams through branded merchandise that is only available from shops within each park. This exclusivity entices frequent park visitors to explore further afield.

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 (tree ornaments, pillows, water bottles, shot glasses, and even plush moose). Their physical stores also give visitors the opportunity to order memorial benches and New Hampshire State Park License Plates, which include access to all parks with the \$85 annual license plate fee.²⁰

Parks Websites and Trip Planning

The first point of contact with a potential visitor is often far from the front gate; usually, it occurs in their own home while they are comparing options for a day trip, weekend getaway, and/or an extended vacation. Today, this all begins online. Effective first-contact online means having a user-friendly website that allows potential visitors to explore before they visit, select the right destination for them, and prepare according to their trip. A functional web system must include an easy-to-navigate reservation system that does not require any previous experience or outside knowledge of the parks system to select the right accommodations for their desired experience. Tourists, whether looking for an adventure in their own backyard or across the world, expect to be able to weigh their options and book with confidence.

All park systems that hope to attract visitors rely on user-friendly websites that allow potential visitors to explore the

²⁰ <https://www.nhstateparks.org/about-us/support/new-hampshire-state-park-license-plate>

full suite of attractions and plan every detail of their trip from the comfort of their own homes. The best systems provide easy-to-navigate reservation systems that allow visitors to reserve campsites, backcountry access, and fixed-roof accommodations. Additionally, they clearly outline the rules and expectations for visitors, so they know what to expect before they arrive. The best systems also connect visitors with commercial businesses within their parks that offer experiences, services, merchandise and accommodations that the parks systems themselves do not directly offer. Tourism Saskatchewan²¹, Société des établissements de plein air du Québec (Sépaq, Québec Parks)²², and United Kingdom Nation Parks²³ 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.

Social Media and Digital Marketing

In recent years, social media has dramatically changed the way that parks organizations market and highlight their parks. Nearly all provincial park organizations now focus their marketing efforts on social media influencers.

Alberta does an annual call for social media influencers through their Parks Ambassador program.²⁴ They select ambassadors from a variety of age groups, locations and preferred kinds of recreational activity. They conduct training with Parks Ambassadors early in the season about achieving the appropriate tone with their posts (e.g., "don't hike in flip flops"). Parks Ambassadors are volunteer roles; the only compensation that Ambassadors receive is free camping.

Image 1: Alberta Parks uses Park Ambassadors to share their experiences in provincial parks on social media, 2021.



Ontario is also increasingly working with social media influencers. The Ontario Parks Department rents a bus each year for a tour to show influencers different parks around the province. Aside from this tour, the only marketing

²¹ <https://www.tourismsaskatchewan.com/places-to-go/provincial-parks>

²² <https://www.sepaq.com/>

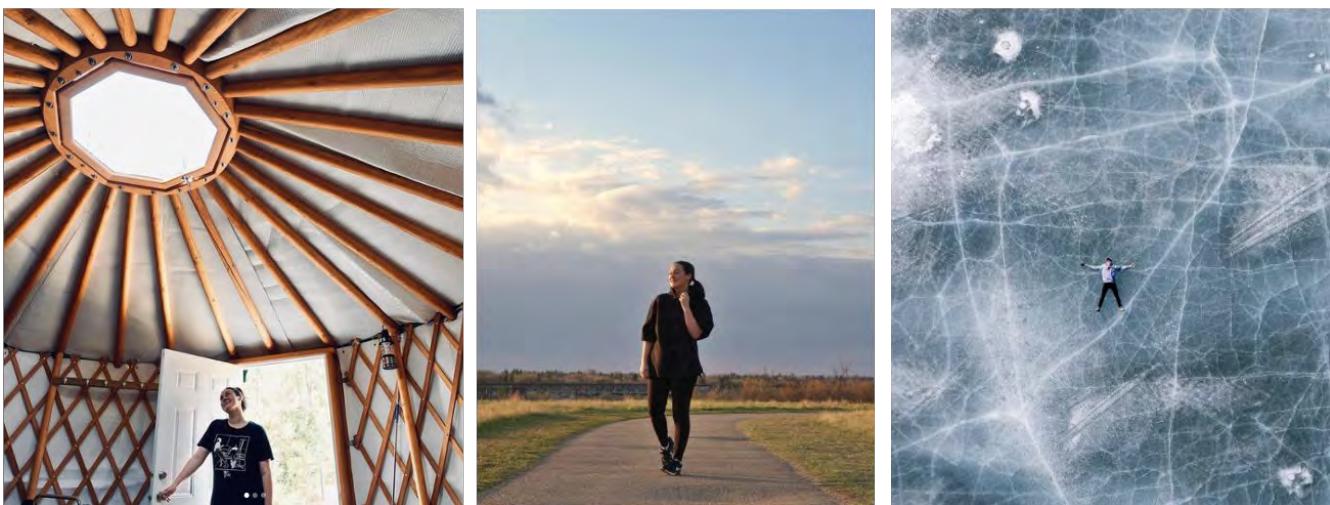
²³ <https://www.nationalparks.uk/>

²⁴ <https://www.albertaparks.ca/albertaparksca/about-us/alberta-parks-partnerships/abparksambassador/#58571>

money they spend is approximately \$60,000 to boost social media posts (however, note that northern tourism outfitters do their own marketing). To capitalize on the RVing market, Ontario has a webpage specifically to promote RVing in Ontario Parks. They have identified seven RV touring routes/loops.

Saskatchewan Parks also works with social media influencers, although their approach is slightly different. Every year, they hire a “Saskatchewanderer” to promote their parks — this role only goes to one social media influencer annually.²⁵ To compliment this digital marketing approach, the Saskatchewan Provincial Parks webpage is entirely hosted on Tourism Saskatchewan’s website; however, Parks still manages the content.²⁶

Image 2: Saskatchewanderers are social media influencers who take photographs in Saskatchewan Parks. Saskatchewan Parks, 2021.



Québec uses a similar approach: all of their provincial parks are highlighted on the Government of Québec’s Tourism’s website, Bonjour Québec, and can also be found on Sépaq’s website. Many itineraries and tourist routes on Bonjour Québec feature Québec parks.²⁷

In contrast to the digital marketing-only approach, Parks Canada still utilizes in-person marketing for its parks. This approach is based on their market analysis work, which showed that most park visitors come from within a two-hour drive of their destination; they also saw that urban dwellers within that radius were a key underrepresented demographic. To address this gap, Parks Canada started an urban outreach program in six Canadian cities in 2010, setting up kiosks and events in gathering places within cities. They found that many urban residents do not have the space to own and store camping equipment. Thus, Parks Canada increased the availability of ready-to-camp oTENTiks and other comfort camping options which do not require people to own their own equipment.

Campground Reservation System and Other Features

The survey results in this report show that Manitobans are largely dissatisfied with Manitoba Parks’s current online campground reservation system. Other parks jurisdictions in Canada have also been working to improve their reservation systems in recent years, with mixed success.

²⁵ <https://saskatchewanderer.ca/>

²⁶ <https://www.tourismsaskatchewan.com/places-to-go/provincial-parks>

²⁷ <https://www.bonjourquebec.com/en/where-to-go/itineraries-and-tourist-routes>

Both Ontario and Saskatchewan have implemented new reservation systems in recent years. Ontario has switched to a system run by CAMUS, which is also used by Parks Canada and BC, as well as many US state parks. CAMUS receives a percentage of sales, so if a parks organization does well, CAMUS does well; however, this helps to reduce risks and costs in a year with low sales. Ontario has also utilized the CAMUS software's digital features to improve customer service in other areas; for example, people may store park passes on their phones rather than having to print them. For sales transactions, park stores can use tablets that are integrated with their online database. CAMUS has a call centre that they run for parks organizations so that the latter no longer has to handle this aspect of reservations.

In contrast, Saskatchewan recently switched from a CAMUS-run service to an ASPIRA system. ASPIRA is the largest parks reservation system provider in North America. In Saskatchewan's opinion, this system has many features that were not offered through CAMUS. Previously, they used their CAMUS system for campsite bookings only. With the new ASPIRA system, users may reserve camping sites and also book recreation halls and picnic shelters. Conveniently, the new system also allows people to extend their stays in their campsite if they see it has become available.

Alberta created an in-house reservation app 15 years ago, which they have found to be very expensive to maintain. However, it allows them to perform certain tasks, like following up each reservation with a visitor satisfaction survey, which randomly selected users are asked to complete after camping. Alberta Parks changes the survey questions each year based on the information they want to obtain. They then partner with the University of Saskatchewan, to whom they provide their park reservation and survey data for analysis. For example, they could estimate the money lost if a water-quality advisory was active within a particular park. Alberta Parks is now updating its website and reservation system to be more mobile-friendly. They are also moving towards touchless pay systems in their parks, recognizing that fewer people carry cash or cheques on a daily basis.

Park Attractions, Amenities, and Experiences

Modern visitors to parks are looking for unique activities and social-media worthy experiences in nature, while demand for traditional park activities (such as hiking and fishing) is stronger than ever.

Group Use

One trend seen across the country is that larger groups of friends and families are looking to gather in parks for both day use and group camping. There is a particular demand for these group-use areas from families who are new to Canada, and provincial parks departments are trying to accommodate and capitalize on this demand in various ways. Alberta and Saskatchewan are building more picnic shelters, recreation halls, and other reservable day-use areas, which visitors may book for a day (Alberta charges \$88 per day to reserve a picnic shelter, while Saskatchewan charges \$80 for a picnic shelter and \$400 to reserve a recreation hall).

Unique Attractions

Parks departments are developing unique new attractions to draw visitors and are rewarded with increases in day trips and overnight stays. Saskatchewan, for example, is working with partners to offer floating water parks and mountain biking courses. Other provinces are taking different approaches: Ontario has focused on developing interesting interpretive programs, like interactive hikes that tie into local folklore and species, which are particularly appealing to youth. Ontario also offers guided walks for older adults; on these walks, park "discovery leaders" give full-day tours for people to learn about birds or other topics. Québec parks are managed by Sépaq, and they lead

the country in providing unique day-use opportunities. Their parks feature activities like Via Ferrata²⁸ and Arbraska's Zipline and Treetop Trekking courses.²⁹ In other parks, you can navigate a wooden labyrinth or rent a Rabaska (a large bark canoe originally used by Indigenous people in the region) for small group excursions, accompanied by a park warden naturalist. One of the most intriguing attractions operated by Sépaq is the Aquarium du Québec, where visitors can observe fish and animals, watch shows, and even scuba dive.

Another growing trend across Canada is an increased demand for winter activities available in parks. Ontario has set up an ice trail in Arrowhead Provincial Park, which has quickly become the park's best-known attraction. This park (as well as several others in Ontario) also offers snowshoeing, cross country skiing, and a tube hill, which is free to use (the park even provides free inner tubes). Sépaq constructs free inner-tube slide runs in several parks each winter. Other parks have winter fatbiking trails, with daily fees for bike use. There are seven designated cross-country skiing destination parks in Québec, with equipment rentals, waxing rooms, heated relays, restaurant service and shops. In three locations, Sépaq has collaborated with local partners to offer dog sledding (for a fee).

The list of unique park attractions across the world goes on. In Germany, tourism companies and authorities that are especially connected to parks can become "Parks Partners." Such partners include tidal flat guides, tour operators, and railway and accommodations companies. Partnerships allow German parks to offer unique experiences, with some enterprises having developed attractions like treetop walks and forest rope courses, and unique accommodations that allow visitors to sleep in treetops on platforms or in hanging tents.

Image 3: Sleeping in a hanging tent in Germany, Waldseilgarten Höllschlucht (2021)



In Finland, nature tourism entrepreneurs provide guided tours and other services (such as sauna rentals) in some parks. Several of these guided excursions would translate well to Manitoba Parks, such as dog-sled rides; forest mindfulness and forest yoga; guided snowshoe walks; mushroom and wild herb picking; and geological excursions. All nature tourism entrepreneurs have cooperation agreements with Metsähallitus (Parks & Wildlife Finland) and must follow a strict set of "principles of sustainable nature tourism."

Across the Baltic Sea in Estonia, visitors can book guided snowshoe hikes throughout the entire year, not only when snow is on the ground; "snowshoes" are also the best kind of footwear for walking through bogs, which translates to a unique tourism product. Visitors can book innovative canoeing or kayaking trips in Sooma National Park during what is called the "fifth season," the time of the early spring flood (which is very familiar to Manitobans). During this season, visitors can paddle through riverbank treetops and other high-water locations that cannot be accessed at

²⁸ A protected climbing route that uses cable, bolts, ladders and other climbing aides to allow visitors with no prior experience to "mountain climb". Originating in the Alps it has expanded into the North American marketing in the last decade.

²⁹ <https://en.arbraska.com/our-adventures/>

other times of the year.

Image 4: "Fifth Season" kayaking in Sooma National Park, Estonia (2021)



The annual United Kingdom Nation Parks Dark Skies Festival is held from mid-to-late February and includes astrophotography, stargazing, nature walks, and other events. Their National Park website is a prime example of a platform that communicates a sense of adventure while showcasing what their parks system has to offer. The New Forest National Park in the UK has free-roaming animals, including ponies, cattle, donkeys, and pigs. The animals are a major attraction to the park, and they also make a "positive contribution to the remarkable biodiversity of the New Forest" via their grazing patterns. Owned by local "commoners," these animals are allowed to graze in the common space of the New Forest.

The Netherlands, in true Dutch fashion, offers iconic "White Bicycles" at De Hoge Veluwe Park, which are free to use by visitors. Unique accommodation experiences are offered at Alde Feanen Park through overnight mooring and "camping on a sloop" experiences. There is also an annual "weekend of the horse," which allows free entry for any visitor on horseback.

Image 5: White bicycles in De Hoge Veluwe Park in The Netherlands (2021)



In Australia, tourists are able to access unique tourism opportunities like Yellow Water Cruises' boat tours on the Yellow Water Billabong (Oxbow Lake) or the Spirit of Kakadu Adventure Tour in a 4-wheel drive van around the park. These experiences are tied to partnerships with Indigenous tourism operators, which are described in more

detail below.

New Zealand positions their natural assets as their main attraction and has curated ten (10) Great Walks (multi-day hikes and one canoe journey) that offer premium experiences that "showcase the best of New Zealand's landscapes, and natural and cultural values." Te Ara Moana — 'the sea-going pathway' — is a self-guided 5-day sea kayaking tour along Auckland's coastline, connecting five regional parks. These parks include special campgrounds designed for sea kayakers.

Visitor Centres & Parks Stores

Despite the prevalence of online parks reservation systems, digital maps, and information about parks available on the Internet, parks organizations in other parts of North America and in other countries continue to invest in parks visitor centres or interpretive centres. As the point-of-welcome for visitors, these physical buildings are still important. They are also hubs where park staff can be found; this visibility and availability of parks staff can greatly improve the visitor experience and contribute to a sense of place. With staffing cuts and the closure of park gates and welcome centres over the last decades, this is one area where Manitoba has fallen behind other Canadian and international parks systems.

Sépaq, for example, has built interpretive centres in eight of its feature parks. These welcome centres are often paired with stores and luxury accommodations, which are explained in more detail below.

Ontario has also recently invested in a new visitor centre and picnic pavilion in Arrowhead Provincial Park, which opened in December of 2018. They are now using this visitor centre as a "hub for outdoor recreation and discovery," as well as a lounge area and warm-up site for skiing, snowshoeing, and ice skating in the winter. The visitor centre features a shop where people can rent equipment or join outdoor-skills training sessions (i.e., ski workshops) throughout the year. Even in locations that do not have visitor centres, all operational provincial parks in Ontario have stores similar to this, where visitors can buy works from local artisans or rent canoes, bicycles, or paddle boats. Fishing gear and Personal Floating Devices are free to borrow at all Ontario Parks. Exclusive park-branded merchandise is available at park stores, with some items (such as patches and stickers of individual park crests) only available in specific locations to encourage the "collector" to gather such souvenirs from multiple parks.

Image 6: Arrowhead Visitor Centre, Ontario Parks (2021)



Other countries around the world have also invested in impressive visitor centres that serve to welcome visitors to

parks, provide information on heritage and culture, and function as tourist destinations for additional reasons.

Estonia's Lahemaa Park features the RMK Sagadi Forest Centre, which includes the Forest Museum of Estonia; the oldest nature school in the country; a mansion with facilities for seminars and parties; a hotel and hostel; and a restaurant with a "forest-inspired menu."

In Sweden, the Naturum Laponia Visitor Centre is located in Stora Sjöfallet/Stuor Muorkke National Park. This beautiful building acts as the visitor centre for all of the national parks in the Laponian area, as well as for the Laponia World Heritage Site and nine Sámi communities.

Image 7: Naturum Laponia Visitor Centre, Stora Sjöfallet/Stuor Muorkke National Park (2021)



Alignment with Nature

Overall, provincial parks departments have been searching for unique recreational activities to attract new visitors to parks, while ensuring that these activities do not detract from other visitors' enjoyment of nature. In some cases, parks departments have been shutting down or reworking activities that do not align with nature. For example, Ontario is phasing out golf courses in parks because their use of pesticides does not align with Parks' environmental values.

Image 8: Rabaska in Parc national des Hautes-Gorges-de-la-Rivière-Malbaie. Photo by Mathieu Dupuis, Sépaq, 2021.



Accommodations

Comfort Camping / "Glamping" / Learn-To-Camp

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 75 yurts and 34 cabins for nightly booking; these accommodations are among the hottest commodities to book when the reservation system opens each year. Comfort camping options are attractive to visitors because they do not have to own any camping equipment in order to have a camping experience. As such, they provide a perfect "learn-to-camp" excursion. They also provide visitors with an increased level of confidence that they will be able to stay dry and comfortable regardless of the weather.

Many other provinces are embracing comfort camping. Ontario has more than 600 roofed accommodations, yurts, cabins and prospector tents in their provincial parks. They have turned many park superintendents' houses into year-round cottage rentals. Saskatchewan is moving towards more yurts in their parks, but (as in Manitoba) they are more bare-bones than a true "glamping" experience. They have turned to the private market to deliver more high-end comfort camping accommodations (e.g. with linen services, etc.). For this same reason, Alberta has backed away from some of their own early investments in glamping, which they saw was becoming too similar to operating a hotel and was outside the expertise and resources of their parks department. They are now looking to partner with a local hotel for housekeeping services. Alberta's experience with establishing comfort camping seemed an over-diversification of the market, with too many scattered sites and not as much profit-generation as was anticipated.

In contrast, Parks Canada has put a major effort into the design and servicing of their own unique comfort camping experiences. Their strategy to promote comfort camping is based on extensive market analysis work within the past decade. Ten years ago, demographic analysis showed that Parks Canada visitors didn't look much like the Canadian demographic as a whole; it was weak in ethnic diversity, urban Canadians, and young families. To address this, they focused on "front-country" introductions to nature experiences. They put up more soft-walled accommodations (usually oTENTiks, which are similar to prospector tents) and expanded their Learn-to-Camp program, which they transformed into an outreach initiative through partnerships with service organizations. This approach is less about learning how to camp and more about giving people a chance to connect with nature in a comfortable way, which helps to build fidelity with new customers. Parks Canada is now developing new products targeting young couples, including the *oasis* (an elevated structure for treetop views and a canopy that can open up for 360-degree views) and the *MicrOcube* - "a window for two with a nature view."

*Image 9: An *oasis* and *MicrOcube*, Parks Canada, 2021*



Other locations around the world have also embraced various forms of comfort camping. Australia's Karijini Eco Retreat is 100 percent Indigenous-owned and offers a unique outback glamping experience with deluxe eco-tents in Karijini National Park.

Luxury Accommodations: Resorts and Chalets

Some park organizations have gone even further in providing a range of accommodations beyond adding comfort camping and RV-equipped sites. Sépaq, for example, has developed resorts and chalets alongside their "tourist establishments" in the province's destination parks. These accommodations range from 4-star inns, to lakeside chalets, to mountaintop resorts that offer fine cuisine and spa treatments.

All Sépaq tourist establishments have a mission that requires management to be in alignment with the principles of sustainable development, including maintaining operations and services that respect the quality of the environment. They must meet established standards for energy, water, and waste management; facilities management (new infrastructure and upgrading of non-compliant facilities); eco-responsible purchases; and ecological hotel practices. They ensure that staff, customers and the public are aware of these sustainable values.

Image 10: Station Touristique Duchesnay, Sépaq, 2021.



In contrast, provinces like Ontario have purposefully avoided resort development; instead, they have focused on improving core recreational camping and outdoor experiences. Their goal is to make these experiences the best they can be, which includes minimizing efforts towards other developments (like resorts) that could compete or detract from these core offerings.

RVing

Camping in Canada is no longer primarily associated with tenting. Increasingly, people are looking to camp with recreational vehicles (RVs). These campers are looking to bring some of the comforts of home into the woods with them, often requiring electricity, water, and even sewer hookups at their campsites. Many of the campsites developed in provincial parks are no longer large enough to fit modern RV units, and few sites are designed as "pull-throughs," which make it much easier to park large vehicles and trailers.

Provincial parks departments across Canada are finding it hard to keep up with the demand for sites that meet the needs of RVs. Ontario is making a push to electrify as many campsites as possible: they are hoping to electrify 50% of their sites in the near future (note: Manitoba is almost at 50% electrification of sites already, with 3,153 basic sites and 3,142 sites with at least electrical service). Alberta is also working to upgrade campsites for RVs with power, water and sewer hookups. They see the revenue potential in doing this, as the electrification of sites is fairly easy to accomplish and allows them to charge more per night. In Alberta, the minimum price for an electrified campsite is twice the minimum price for a basic campsite (\$16 compared to \$8). In Manitoba, the price difference between an

electrified campsite and a basic campsite is not as great (\$15.75 compared to \$11.55 minimum price per night). A full comparison of fees for different site types across the country is provided at the end of this section.

Image 11: Dinosaur Campground, Travel Alberta, 2021.



Backcountry Access

Managing access to backcountry canoe and hiking routes is essential to ensure the sustainable utilization of natural assets by visitors. Furthermore, active access management allows commercial tour operators to provide guided experiences into the backcountry while reducing potential conflict with other individuals or groups.

Ontario Parks manages access to backcountry canoe and hiking routes using three (3) different mechanisms, depending on the unique requirements of each park. These reservation mechanisms are:

1. Specific Campsite: Reservations are for a single, specified numbered campsite and are generally used in more heavily frequented parks in Southern Ontario. Each campsite on a route must be booked at the time of reservation;
2. Zone/Area Bookings: Reservations are for a lake zone or area and allow park managers to control the volume of people in each area. Within the designated lake or zone, campsites are available on a first-come, first-served basis. This type of reservation system can result in racing for the “best” site during peak season;
3. Entry Quota: This system is unique to Quetico Provincial Park and is based on a park carrying capacity study. It works by allowing a certain number of groups through a given backcountry access point each day and managing the total number of people/groups in the park at any given time. Visitors reserve the access point from which they want to start their trip and then, once travelling in the park, all campsites are available on a first-come, first-served basis.

In addition to the reservation mechanisms listed above, some parks operate on a “first-come, first-serve” basis that requires an Interior Camping Permit but does not offer any type of reservation for campsites.

Accessibility

Accessibility improvements are a critical step in making parks more equitable and enjoyable for all park visitors, including people with physical and mental disabilities. These improvements also help to make parks continually accessible to a core audience of older adults as they age.

Parks in all jurisdictions researched in Canada have been making accessibility improvements in recent years,

including Manitoba, where Mobi mats have been installed on many beaches, providing wheelchair access to the water. This section highlights the outstanding work on accessibility improvements in some other jurisdictions.

Parks Canada has a clear mandate for inclusion: National Parks are intended to be enjoyed by all Canadians. The key is that they want people to feel welcome in National Parks. For that to be possible, visitors have to arrive without anxiety. To achieve this, Parks Canada has made changes to their branding; trail standards; camping sites and amenities; signage; and communication. They collaborate with leaders in the disability field to determine what improvements to make.

Sépaq creates an annual action plan for parks accessibility improvements. The action plan includes a checklist that aids in better welcoming and serving people with disabilities. As one example, holders of the Leisure Accompaniment Card (CAL) can be accompanied free of charge by one person during a visit to a park in Québec.

Alberta Parks makes accessibility improvements through their Push to Open Nature initiative.³⁰ This initiative aims to identify all barrier-free facilities and accessible experiences in Alberta parks. Barrier-free facilities include campsites, whereas accessible experiences include Golf Cart Tours (which are available in three parks) and Adaptive Nature Challenges, the latter of which includes the availability of adaptive equipment such as Park Explorers, TrailRiders, sit-skis and outrigger kayaks. To further target accessibility improvements, Alberta Parks has implemented the Cecile Buhl One-Kilometre Experience, with the goal of providing at least one kilometre of accessible infrastructure and trails in each park, including an accessible washroom and parking.

Image 12: A TrailRider in action, Rocky Mountain Adaptive, 2021³¹



³⁰ <https://www.albertaparks.ca/albertaparksca/visit-our-parks/inclusion-and-accessibility/push-to-open-nature/>

³¹ <https://rockymountainadaptive.com/trail-rider/>

Tourism and Commercial Operators

Tourism and commercial operators are essential partners in delivering high-quality visitor experiences that align with the strategic priorities of parks systems. By managing the access to and use of quality natural assets, park managers across the globe allow responsible operators to create value for visitors and themselves while contributing to the park system's mandate.

Role of Operators

Parks Australia wants to provide "new high-quality tourism experiences" and sees an important role for tourism operators in "facilitating visitors' access, encouraging positive behaviours and in promoting the values of the reserves."

Operators provide opportunities for visitors to access experiences they would not otherwise be able to access. Guided tours, equipment rentals, and accommodation providers play an essential role in attracting visitors to parks and optimizing their perceived value of those park experiences. Tourists want to explore landscapes, see the northern lights and wildlife, and play in the wilderness in all seasons; however, many are not equipped to do so, nor do they have the experience to confidently and successfully do so independently.

Indigenous Partnerships

In Australia, Indigenous commercial operators are key to many tourism ventures in parks. Resorts highlight Aboriginal cultural tours, like the Sacred Canyon Yura Mulka Cultural Walk in the Ikara-Flinders Ranges National Park, which is only accessible on an Adnyamathanha guided tour. In this tour, an Indigenous guide shares the cultural significance of the ancient rock engravings from the perspective of the Adnyamathanha people.

New Zealand has also developed Indigenous partnerships. For example, the Ātea a Rangi Educational Trust designed a Star Compass in the Waitangi Regional Park and they now run tours of the site.

Managing Operators

Park Management Plans and system-wide strategic priorities help determine what type of operators can operate and where they may be located. It is important for operators to clearly understand their role within the system and their accompanying responsibilities, and for whoever oversees commercial operators to have mechanisms to enforce agreements.

Approvals

Some jurisdictions provide opportunities for free consultations prior to potential commercial operators applying for the access to or use of park assets for their ventures. This usually takes the form of a meeting early in the process to discuss their idea or review a proposal to help reduce time and effort put into less feasible ideas and help "good ideas" navigate regulatory bureaucracy. Other jurisdictions empower mid-level park management to find or create approval mechanisms for projects that align with the strategic objectives of their park but do not quite fit within pre-existing mechanisms. Both approaches rely on every park having up-to-date management plans to which decision-makers may refer.

The scale and intensity of commercial activities determine the required level of approval and scrutiny from parks management, as well as the expectations of operators.

Training Requirements / Certifications

As commercial operators, especially tourism businesses, are essential partners in delivering high-quality visitor experiences in parks, some jurisdictions require training and certification for some or all businesses operating within their parks. This ensures consistent and high-quality experiences regardless of who is directly interacting with the visitors.

Visit Scotland has a Quality Assurance program that serves as their official grading system for tourism businesses and associated activities. The aim of the program is to help tourism businesses meet and exceed the high standards customers expect and help make Scotland a “must-visit destination that people are keen to return to.” It provides benefits to tourism businesses and gives them an internationally recognized accreditation that they can use to promote themselves. Additionally, they provide tools to help benchmark business performance and identify areas where training or investment would have a large impact. Since this accreditation is so well known, it is marketed to businesses as a tool for growth that can help with loan applications or lend additional strength to a business plan. Fees for participation in the program are based on the type of operation and tiered based on the scale of operation to encourage widespread adoption, even with smaller tourism businesses. The “Quality Assured” logo is an internationally recognized symbol of excellence that gives visitors confidence in the quality of the product or service they will consume or receive.

In Sweden, corporate partners receive training on the Swedish National Parks brand and what it means to work in a National Park. After the training, partners receive the right to use the logo. This encourages partners to develop unique products that truly align with natural values. For example, Sweden Parks’ partner Enets³² sells food in Store Mosse National Park, focusing on climate-smart, locally produced, in-season ingredients. They even provide picnic baskets so that people can bring meals with them into the park.

In The Netherlands, parks recreational entrepreneurs and accommodation owners are called “hosts,” who are advertised as park guides. One parks website says, “Meet the hosts and hostesses of De Alde Feanen National Park. These recreational entrepreneurs know every detail of the park, and how to make the most of your time here; from the best bike rides and sailing routes to the most unusual plants and animals that have made this place their home. Feel free to come on in.” Certified hosts get a sign to place outside their establishments and are linked on park websites. Park hosts must take a National Park Host of the Landscape³³ course so that they are well informed about the special features of the particular parks in which they operate. This includes “experience weeks,” where the whole network of hosts works together within one area to allow guests and visitors to experience the area for a week. More than 2,500 parks partners have now taken this course.

³² <https://www.enets.se/en/>

³³ <https://www.ivn.nl/gastheervanhetlandschap/over-gastheer-van-het-landschap>

Image 13: The Netherlands' Host of the Landscape Course, IVN (2021)³⁴



In Australia, to apply for longer-term (3-year) permits, Australia National Parks requires tour operators to be accredited under Tourism Accreditation Australia Limited (TAAL) programs, which include the Ecotourism EcoCertification Program, the Advanced EcoCertification Program, the Nature Tourism EcoCertification Program, Respecting Our Culture, and the Australian Tourism Accreditation Program (ATAP)³⁵. These accreditations are not required for tour operators who meet the requirements for standard land-based tours on one-year permits, but they may be required in the future. The rationale for requiring accreditation is that they assist tourism businesses with improving their operations while assuring consumers and the industry that they are committed to quality business practices, sustainability and professionalism in all aspects of their enterprise. Additionally, in Australia's Northern Territory, accredited tour operators benefit from access to the marketing and promotion services of Tourism NT. All guides working in Uluru-Kata Tjuta and Kakadu Nation Parks are required to successfully complete the "Knowledge for Tour Guides" program, which gives basic training around visitor safety; understanding the park's natural and cultural values and history; minimizing environmental impact; and legal compliance³⁶.

Park Management

Overall, provincial and state parks are typically managed within government departments that often include several other sub-divisions, such as conservation, environment, infrastructure and resource management. The vast majority of Canadian jurisdictions operate with government appropriations to finance their operations as a division within a specific department. This is the model currently in place in Manitoba. All revenues flow into the general treasury of government and are not retained by the department for further management. There is a common challenge across these organizations in being able to manage capital renewal and obtain a sufficient 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 subjected to decreasing resources and forced to shrink their operations to simply maintenance functions. Some organizations in Ontario, Saskatchewan, Alberta and elsewhere manage partial operating budgets within the year, which 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. It is also worth noting that there are dramatic differences in focus within various departments depending on the priorities that are in place. For example, it appears Ontario references a total staff component of 26 people dedicated to marketing and communication (4 positions are vacant at this time) in their

³⁴ <https://www.ivn.nl/gastheervanhetslandschap/beleefweken>

³⁵ All accreditations are provided by Ecotourism Australia, except for ATAP, which is a standalone program.

³⁶ Parks Australia: Commercial Tourism Permit Guidelines

parks organization. By comparison, Manitoba Parks, at the time of this writing, does not have any dedicated communications and marketing staff, and any limited support that is required is delivered by resources that are also responsible for other functions.

In 2020, the Government of Alberta announced that it would be closing (or partially closing) 20 parks and selling off 164 others to be managed by external parties. They saw \$5 million in annual savings from this move. In some cases, parks will be closed from further public access, and in others, services like groomed ski and sled trails will be cut. Camping-service charges and other user fees are expected to increase significantly. Otherwise, the remaining parks are now managed by the Ministry of Environment and Parks. At the time of this writing, it is unclear how much of this privatization strategy has moved forward.

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

In summary, none of the jurisdictions under research have found the ideal model. Most are struggling and attempting some level of change. Only Québec seems to be firmly committed to their model of the crown corporation to allow them the autonomy they need and control their own service and investment level.

System Objectives

The mandates of most parks systems include a blend of nature conservation (flora, fauna, landscapes, ecosystems, landforms, culturally important areas, etc.) and access for recreation and economic benefit. The balance of those objectives are generally defined through specific goals, which are determined at a high level by legislation and/or special governance structures.

Governance, Management, and "Ownership"

Some parks systems, such as those in Ontario, rely on advisory boards to provide guidance on system planning, management, and development.

In Sweden, the Naturum Laponia Visitor Centre in Stora Sjöfallet/Stuor Muorkke National Park (described above) is managed by Laponiatjuottjudus: a locally-based non-profit organization. All of the organization's decisions are made through unique working methods and require the consent of all parties, including the Sámi communities in Laponia, two municipalities, the County Administrative Board and the Swedish Environmental Protection Agency. New Zealand and Australia have embedded parks within their reconciliation processes, giving control of some key parks back to the "original owners": the local Indigenous people.

Parks Australia, for example, makes the joint management of parks a guiding principle. Three parks are owned by Indigenous groups and managed in cooperative agreements between the Director of National Parks and traditional owners. This is both a legal and procedural arrangement that starts with land rights and legal ownership of the land in the Indigenous communal title. The Indigenous groups then lease the land back to Parks Australia's Director of National Parks, with related obligations defined in a lease. Boards of Management, all with Aboriginal majorities, are established in each park. Park staff have regular opportunities to learn from the traditional owners and work to achieve the latter's aspirations for the park.

In New Zealand, the Greater Wellington Regional Authority maintains partnership arrangements with six mana

whenua (Māori) iwi authorities. These relationships were formalized through a Charter of Understanding and a Memorandum of Partnership. Māori authorities identified a range of interests, issues and opportunities for regional parks going forward, including "a desire for enhancement for regional corridors or biolinks for wildlife; the opportunity to work with mana whenua to reveal more of the significant stories of particular parks to park visitors, for example through heritage interpretation activities and mana whenua led heritage walks; interests in mahinga kai (the customary harvest of native plants and animals); ongoing input to significant decision making and cooperative projects or works; and more Te Reo Māori place and park names for parks and park facilities such as trails."

Parks Canada (The Agency) is an agency of the Government of Canada as established by the Parks Canada Agency Act of 1998. The Agency reports to the Minister of the Environment and is headed by a Chief Executive Officer (CEO) appointed by The Governor in Council. The Agency is not a Crown Corporation, but an agency of the ministry, with considerable independent powers to manage, buy and sell property; take out licenses and register patents and trademarks; publish information; determine human resource positions and terms of employment; and assign duties. Money may be appropriated from parliament, but the agency can also use proceeds from revenue sources including proceeds from service fees.

Financial Sustainability

Parks departments across the continent have suffered from significant budget cuts over recent decades. Where resources are limited, departments must always ensure that development, operations, and staffing costs are financially sustainable. The financial sustainability of Manitoba Parks is discussed elsewhere in this report. This section highlights lessons learned from other jurisdictions in Canada.

Ontario Parks has one of the strongest parks cost-recovery models in the country. In the 2020/21 fiscal year, Ontario Parks had expenses of approximately \$100 million, but generated \$95 million in revenue. The majority of this revenue (more than 60%) came from camping fees. Donations were a relatively small contributor, with approximately \$500,000 during the fiscal year; however, Ontario has hired an individual to pursue legacy-giving opportunities that could increase this revenue source. Ontario also has a special-purpose fund within their own corporate structures. The legislation dictates that money earned can only be spent on park operations, which provides them with some flexibility during the year, but the fund must be managed to a net-zero balance by year-end.

Alberta is unique within Canada in that it does not collect money for day-use passes. 60% of Alberta Parks's funding is from taxes and 40% is self-subsidized. As in Ontario, almost all revenue comes from camping; however, on a campground expenditure budget of around \$86 million, approximately \$36 million is reported to be recovered by camping fees (41%). Alberta has a dedicated Parks Revenue Fund. Its mandate: "If we charge a fee, we keep that money. However, we have to forecast to the Treasury Board. If we earn more than that, we don't get to keep that money, we have to go back to Treasury and ask for that."

The most unique model in Canada is that of Sépaq in Québec. Sépaq is a crown corporation rather than a government department, so all revenues generated remain in the parks. Employment and recruiting is more independent of other government operations. According to Sépaq, this creates a culture of motivation and engages employees better than other approaches. This has been their model for the last 20 years. The provincial government pays about 20% in management fees (to cover the non-commercial aspects of the business, such as conservation, education, and anything that is not financially profitable). The other 80% comes from Sépaq's own independent income (from lodges, hotels, camping, shops, etc.). Since its establishment, Sépaq has accumulated over \$600,000,000 in liabilities to reinvest in Québec tourism. Sépaq does request donations for conservation

projects via their website (i.e., when visitors book their trips, they also sometimes donate \$2-5), but this is not a major revenue source (only around \$100,000 per year).

Operating Models

Research has shown that there are many approaches to building a sustainable and effective operating model. In all successful models, the visitor and visitor experience are central. Those that are in control of their own investments and revenues are more capable of managing growth and improvements. For example, parks departments need to understand that higher camping rates allow for better investment and service in campgrounds, and higher park fees create better signage, roads and services. Without this understanding, the strategy's integrity is lost. Some jurisdictions are trying to build such models within operating units of government departments. Saskatchewan and Ontario, for example, are looking for creative ways to manage their revenues and expenses more effectively through special funds and inter-year projects and transactions. Both would confirm that this scenario is much less than ideal. At the time of this writing, Alberta had initiated a move towards the increased privatization of certain parks to encourage a balance of revenues and expenses, but the status of this initiative was not clear and may have stalled.

Sépaq, again, is unique: it owns and operates virtually all parks activity, including accommodations. This gives them almost full autonomy to manage income and expenses, borrow money, and invest to create and enhance visitor experiences and tourism in Québec's parks. Sépaq, however, operates on a much different scale than does Manitoba. For example, their central corporate structure supports 5 Vice-Presidents and more than 50 senior managers to provide central corporate oversight. At March 31, 2021, Sépaq was carrying \$622 million in total liabilities, with an increase of \$80 million for the year. They have approximately \$171 million in revenues, of which approximately \$112 million are described as commercial sources. Management fees for the year were approximately \$23.6 million. Total expenditures for the year were \$168 million.

The US state of New Hampshire went through a severe period of the deterioration of their state parks in the seventies and early eighties. In the mid-eighties, a deliberate strategy was developed to turn the situation around. The state made a major investment into this strategy, on the condition that the parks could fully sustain their operations afterwards. The state currently charges its visitors fees for activities, as well as charging fees to businesses, allowing it to fully recover all costs from operations without requiring any appropriations of tax revenues. Only 26 of New Hampshire's 93 parks show a positive cash flow. These income-generating parks support the whole of the state's parks system's operations and administration. They focus on core activities such as hiking, camping, skiing, snowshoeing and biking, and ensure that all fees charged within parks are comparable with private enterprises operating externally. The strength of this "all funds" approach is that all revenues generated within parks are invested to benefit the entire parks system.

Colne Valley Regional Park is one of the few regional parks in England that is neither part of the National Parks system nor managed by a local government. Instead, it is managed by a board and relies on the support of partners, which include Corporate Supporters and Member Organizations. Member organizations include nearby municipal councils, natural history societies, conservation groups, angling societies, sailing clubs, etc.

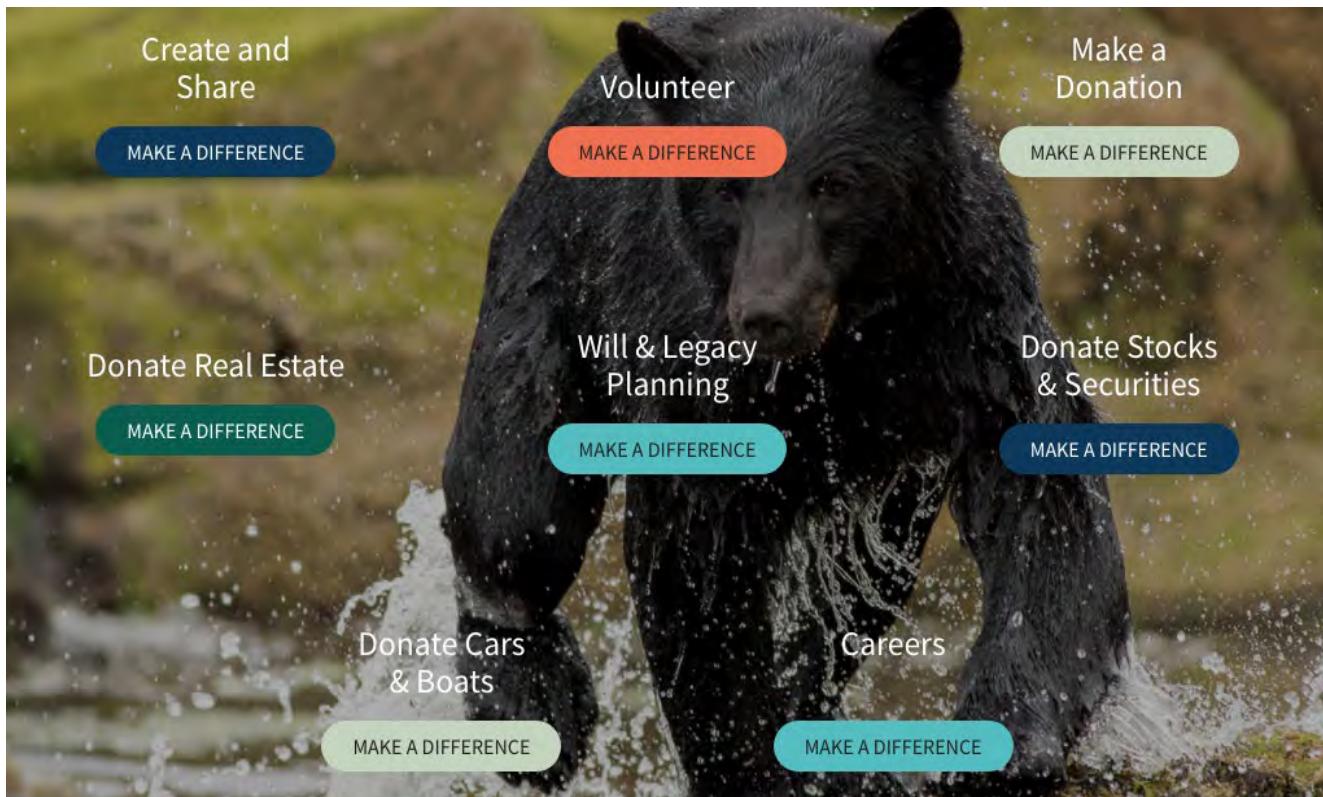
In The Netherlands, parks are not solely owned and managed by the government. For example, De Meinweg National Park is two-thirds owned by Staatsbosbeheer (the Dutch government organization for forestry and the management of nature reserves), the Municipality of Roerdalen owns approximately 500 hectares, and other pieces are privately owned.

Donations and Legacy Giving

When it comes to parks organizations wishing to obtain financial support through donations and legacy giving, BC has taken the lead. BC Parks is a government organization similar to 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 BC Parks Foundation offers a variety of giving options, including donating real estate; cars and boats; will and legacy planning; and donating stocks, securities, and standard cash donations. 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, only initiated in 2018, is relatively new in its development. To date, it has focused on the acquisition of additional park lands.

Image 14: BC Parks Donation Options, BC Parks website (2021)



Partnerships

To offset some costs, parks organizations have increasingly turned to partnerships with non-profit organizations, Indigenous governments and groups, and private corporations.

Indigenous Partnerships and Municipal Partnerships For Specific Parks

For example, Ontario Parks partners with Indigenous groups in a number of ways. They have items from Indigenous artisans for sale in Parks stores, and they also work with local Indigenous companies to buy canoes, which they can then rent out. Ontario Parks has even funded a special project where an Indigenous canoe-maker built a canoe in

the park for visitors to watch.

In some other provinces (including Manitoba), whole parks are managed by municipal, Indigenous or private partners. There have been some success stories here, including in provinces where Indigenous communities have successfully operated and managed parks. Some private operators have been able to turn around parks that were neglected. However, there are also challenges to such arrangements (such as challenges with ensuring privately operated parks maintain the same service standards as parks that are run by the province).

Corporate and Non-Profit

Ontario Parks also has non-profit and corporate partners, such as their new partnership with Ontario libraries. Starting in early 2021, participating libraries across Ontario will begin to loan Day-Use Permits to Ontario Parks, free of charge. They partner with private companies like Coleman, Off, Qwick Wick, and other corporations to provide equipment for programs like Learn to Camp.³⁷ They also have partnerships with RV companies and ZipCar to help provide transportation to parks. All corporate partnerships are highlighted on their website.

Image 15: Learn to Camp, Ontario Parks, 2021³⁸



Similarly, Saskatchewan and Sépaq find commercial lessees "to deliver services that we don't want to," including yoga on the beach, equipment rentals, and adventure tourism (e.g. rock-climbing, kayaking, zip-lining, etc.). Sépaq has also developed a "flavour route," which shows visitors how to get from one restaurant/farm connected with a park to another to try the region's local fare. Sépaq then receives a royalty on their business. In Saskatchewan's case, they do issue Request for Proposals (RFPs) for commercial lessees.

Fee Comparison with Other Canadian Provinces

Table 4 on the next page provides a comparison of various park fees across Canada and the United States in 2020.

Manitoba's one-day park permit is comparable to other parks, but their annual park passes are almost \$20 less expensive than the average across the provinces that were examined. However, when adding in State and Parks Canada fees, Manitoba's annual park passes are only \$10 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 slightly. Parks Canada and Sépaq have per-person pricing but offer free entry to anyone

³⁷ <https://www.ontarioparks.com/learntocamp>

³⁸ <http://www.ontarioparks.com/learntocamp/recipes/special-scrambled-eggs>

under the age of 18. This results in a per-family cost of \$18 for both Parks Canada and Sépaq, compared to \$19 in Ontario and \$10 in Saskatchewan and Manitoba. Annual park passes increase to \$138 for Parks Canada and \$160 (the most expensive) in Québec. When considering a family of four, Québec and Parks Canada become the costliest parks to visit with an annual pass.

The average cost for a family of four to get an annual pass is \$71, assuming both children are under 18 years old.

Table 4: Comparative Park Entry Permit in Canada and Select American Jurisdictions (rounded)

Fee Type	Parks Canada	BC	ON	AB	QC	SK	Minnesota*	North Dakota*	South Dakota*	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 (per person)	\$20	\$99		\$80 (per person)	\$75	\$44	\$44	\$46	\$45	\$58
Annual (family of 4)	\$138	\$20	\$99		\$160	\$75	\$44	\$44	\$46	\$45	\$75

* Converted to Canadian dollars

Nightly camping fees vary widely across Canada, as shown in Table 5 below. 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 priced competitively with North and South Dakota, but are less expensive than in Minnesota. Sites that include a combination of electrical, water, and sewage services are consistently less costly in Manitoba than other provinces and Parks Canada. Manitoba does not charge fees for backcountry camping, unlike several other provinces. Manitoba's camping reservation fees are also fairly consistent with other provinces that charge for reservations.

Table 5: Comparative Camping Fees in Canada and Select American Jurisdiction (rounded)

Fee Type	Parks Canada	BC	ON	AB	QC	SK	Minnesota*	North Dakota*	South Dakota*	MB	Average
Nightly Camping Fees											
Basic Services (Minimum)	\$27	\$22	\$34	\$8	\$18	\$18	\$26	\$15	\$14	\$12	\$19
Basic Services (Maximum)		\$23	\$47	\$29	\$32	\$20	\$32	\$22	\$28	\$23	\$28
Electrical Services (Minimum)			\$39	\$16	\$27	\$32	\$38	\$19	\$33	\$16	\$28
Electrical Services (Maximum)	\$33		\$42	\$37	\$50	\$32	\$44			\$27	\$38
Electrical/Water Services (Minimum)				\$24	\$31	\$32	\$48			\$19	\$31
Electrical/Water Services (Maximum)	\$35			\$45	\$57	\$32	\$55	\$32		\$26	\$40
Full Service (Minimum)				\$32	\$36	\$42	\$55	\$38		\$23	\$38
Full Service (Maximum)	\$38			\$53	\$65	\$42	\$55			\$28	\$47
Backcountry Camping / Adult (Minimum)	\$17	\$10	\$9	\$12			\$26				\$15
Backcountry Camping / Adult (Maximum)	\$75	\$10	\$19				\$29				\$33
Additional Fees											
Reservation Fee	\$13		\$12	\$12			\$11	\$9		\$10	\$11
Change Fee	\$13		\$9	\$5				\$4		\$4	\$7

*Converted to Canadian dollars

For comfort camping (Table 6), 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 what is charged in Ontario, while the maximum cost for a rustic cabin in Manitoba is almost two-thirds less than it is in Ontario.

Manitoba's seasonal camping rates are significantly less than in Ontario and Saskatchewan. Comparison to British Columbia is difficult, though, since the minimum amount is for a four-week period rather than a full "season." BC Parks varies pricing on a park-by-park basis. Some Parks have Long Stay Programs that operate similar to seasonal

site rentals in other provinces, but Long Stay Programs use a fee per-party per-week structure, with a minimum occupancy of four (4) weeks and a maximum occupancy of six (6) months.

Table 6: Comparative Comfort and Seasonal Camping Fees in Canada & Select American Jurisdictions

Fee Type	Parks Canada	BC ³⁹	ON	AB	QC	SK	North Dakota*	MB	Average
Comfort Camping / Fixed-Roof Accommodations									
Yurts / Deluxe Tents (Camp-Easy)	\$123		\$110		\$65		\$121	\$57	\$95
Rustic Cabins (Minimum)		\$17	\$55				\$77	\$38	\$47
Rustic Cabins (Maximum)		\$41	\$150				\$160	\$54	\$101
Camp Cabin			\$130				\$160	\$79	\$123
Seasonal Site Rentals									
Basic Services (Minimum)	\$336	\$757		\$960			\$454		\$627
Basic Services (Maximum)	\$2,160	\$2,218		\$1,220			\$839		\$1,609
Electrical Services (Minimum)		\$1,612		\$2,270			\$588		\$1,100
Electrical Services (Maximum)		\$2,835		\$2,270			\$982		\$2,029
Electrical/Water Services (Minimum)							\$880		\$880
Electrical/Water Services (Maximum)							\$946		\$946
Full Service (Minimum)							\$1,061		\$1,061
Full Service (Maximum)							\$1,174		\$1,174
Day Use Rentals									
Picnic Shelters / day		\$88	\$80	\$63					\$77
Recreation Halls / day				\$400					\$400

*Converted to Canadian dollars

³⁹ The BC Parks fee schedule provides individual park pricing formulas. For the purposes of this comparison, minimum and maximum amounts were calculated to illustrate the range of pricing for comfort and seasonal camping.

Potential Demand and Market

As is the case in Manitoba, most parks systems see the highest percentage of visitation from within their own region (state, province, etc.) and view international visitors as a side benefit of providing quality products domestically. However, research shows that there is strong demand from international tourists to experience nature and witness local flora and fauna that can often best be seen in parks. This section will highlight some of the important findings from this research and provide insights into the potential demand and market for Manitoba's Provincial Parks.

Existing Manitoba Parks Registration and Reservation Origins

Table 7 shows Manitoba Parks' point-of-origin data for the last pre-pandemic season in 2019. The data shows that people reserving campgrounds are predominantly Manitoba residents (91%) and visitors from other Canadian provinces make up 8% of total campground visitors. International visitation is very low in comparison to these local, regional and domestic numbers. American visitors are 1% of the total number of campers, while other international travellers are only 0.3%.

This data includes reservations for campsites, backcountry campsites, group-use areas, yurts and Manitoba Parks-owned cabins. The findings do not include stays in resorts, bed and breakfasts, private cabin rentals and other accommodations that may be in or near Manitoba Parks.

Table 7: Origin and Number of Visitors Making Reservations 2019

Point of Origin	MB Parks Registrations + Reservations	% Total
Manitoba	81,623	91%
Other Canadian Provinces	6,901	8%
United States	1,034	1%
Overseas	269	0.30%

These findings indicate:

- Manitobans are currently the dominant market in attracting visitors to Manitoba Parks;
- Visitors from other Canadian Provinces are significant in number, which suggests an opportunity to further that awareness;
- The US market is largely untapped, as is the Overseas market, which points to a significant future opportunity to attract visitors;
- There are opportunities to attract more national and international visitors to Manitoba Provincial Parks and increase the money and time that all visitors spend in parks.

Existing National and International Tourism to Manitoba

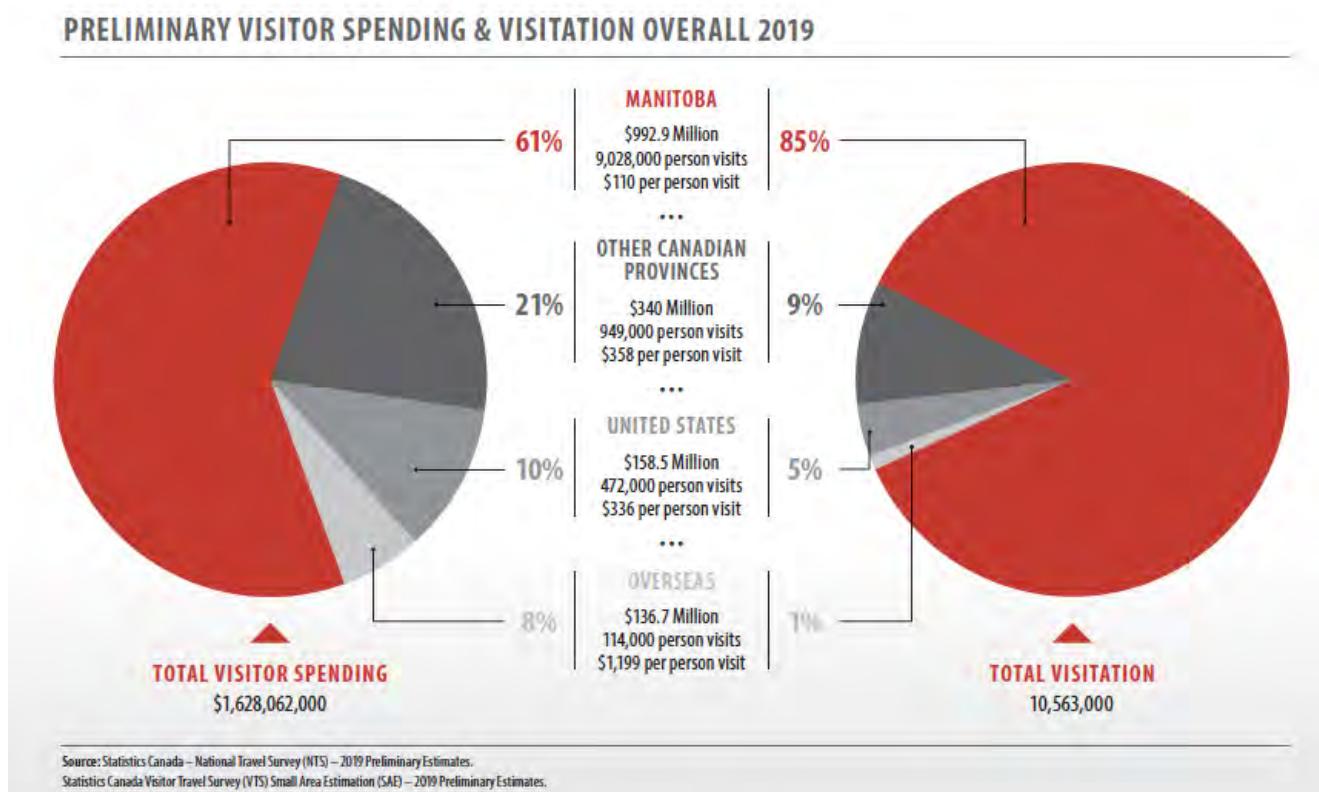
In 2019, more than 10.5 million visitors explored Manitoba, spending more than \$1.63 billion in their travels (Figure 18). While 85% of this tourism was from within Manitoba, there were significant numbers of travellers from other Canadian provinces and other countries. Approximately 472,000 visitors came from the United States, while 114,000

people visited Manitoba from overseas (making up 5% and 1% of total visitations to the province, respectively, and together contributing 18% of total visitor-spending dollars).⁴⁰

In 2019, tourists from the United States made up 5% of total visitors to Manitoba, spending over \$158 million (10% of total visitor spending – Visitor Travel Survey, Statistics Canada). In contrast, US visitors made up only 1% of campground reservations, so there is room to grow this market. Note that American fishermen and hunters have been fishing and hunting in Manitoba Parks for decades, so there is already familiarity amongst this market segment.

In the same year, overseas visitors made up 1% of total visitors to Manitoba, spending \$137 million (8% of total visitor spending – Visitor Travel Survey, Statistics Canada). They constituted only 0.3% of Manitoba park campground reservations, and we know there is substantial interest in the experiences Manitoba Parks offer. Therefore, there is a substantial opportunity to grow this market as well.

Figure 18: Total Visitor Spending and Visitation to Manitoba, 2019



Total Potential International Market Size

Despite the already-strong numbers of out-of-province visitor spending and visitation, research shows that international tourism to Manitoba has the potential to grow significantly in post-pandemic years. The table on the following page shows the total potential market size from the top ten countries that are considering travel to Canada, based on Destination Canada's 2020 Global Tourism Watch data. The data shows that almost 20 million

⁴⁰ Source: Statistics Canada – National Travel Survey (NTS) - 2019 Preliminary Estimates

visitors from other countries have indicated that they are definitely or very likely to make Manitoba or Saskatchewan a destination on a Canadian trip in the next two years.

Table 8: Potential International Market Size by Source Country

Rank	Country	Immediate potential for MB/SK* (2020)	% of Potential International Market
1	United States	7,857,000	39.4%
2	China	3,812,000	19.1%
3	India	2,366,000	11.9%
4	South Korea	1,704,000	8.6%
5	Germany	930,000	4.7%
6	UK	850,000	4.3%
7	Japan	794,000	4.0%
8	France	636,000	3.2%
9	Australia	583,000	2.9%
10	Mexico	385,000	1.9%
TOTAL		19,917,000	100%

*Definitely / very likely to visit in next 2 years (includes respondents likely to visit for a trip of 1 to 3 nights, or a trip of 4 nights or more).

Americans make up the majority of this market, with 7.8 million visitors with immediate potential. Travellers from China, India, South Korea, and Germany also represent significant potential markets.

International Visitation to Parks

Several of Manitoba's top provincial parks could provide the activities around which international tourists are looking to base an entire trip, such as viewing natural attractions like mountains or waterfalls; northern lights; historical, archaeological or world heritage sites; wildlife or marine life; and hiking or walking in nature (the top five activities around which to base an entire trip, as identified by American tourists).

However, it is more likely that international tourists would make a stop in a provincial park as an add-on activity to an existing trip (to Winnipeg or Churchill, for example), rather than making it the reason for their visit. There is a strong connection between the types of general activities international tourists are looking for and the offerings Manitoba's Provincial Parks could provide.

The following table (Table 9) shows the top general vacation activities international tourists are interested in while on vacation. The activities have been arranged from most-to least interest by weighted average (i.e., vacation activities favoured by American and Chinese tourists are given more weight than those from Australia and Mexico because they represent a larger potential market share). These tables only include vacation activities strongly related to parks (they do not include "trying local food and drink," for example). Many of Manitoba's parks already have related activities, such as wildlife viewing and hiking, that rank very high in Canada's target international markets.

Table 9: International Demand for Vacation Activities

Activity	Weighted Average
Natural attractions like mountains or waterfalls	54%
Hiking or walking in nature	50%
Nature parks	46%
Viewing wildlife or marine life	43%
Historical, archaeological or world heritage sites	42%
Northern lights	40%
Exploring Indigenous culture, traditions or history	35%
Camping	32%
Fall colours	31%
Kayaking, canoeing or paddle boarding	27%
Exploring places most tourists won't go	26%
Spring blossoms	25%
Self-guided driving tours or road trips	25%
Guided nature tours	24%
Fishing or hunting	23%
Ziplining	21%
Snowshoeing or cross-country skiing	18%
Guided boat tours	18%
Mountain biking	17%
Casual biking	16%
Renting an RV	11%

The data shows that international tourists are looking for direct experiences in nature, such as hiking and viewing natural attractions and wildlife. These simple experiences are more appealing to a broad market than experiences that require specialized equipment or skills to interact with nature (e.g., mountain bikes, ziplines, RVs).

German tour operators, for example, said the key drivers for German tourists are wildlife and landscapes; people want to get away from crowds and are heading to remote places. They added, "Our clients enjoy a good mixture of activities. This includes basics such as paddling, canoeing, hiking etc. Indigenous-led experiences are becoming more and more requested."

In many cases, international tourists who are new to a location are looking for guided experiences. Tour operators from the UK said their clients are looking for "immersive experiences ... visitors want to get out and experience the nature of the park, but sometimes with a guiding hand and to learn something as they explore," such as guided

hikes, ranger talks, and water-based tours. Australian tour operators echoed their British counterparts, noting that tourists are looking for guided walking trips and other activities such as forest bathing and wellness packages.

International Tourist Accommodation Preferences

One of the main challenges with welcoming international tourists to Manitoba's provincial parks is a lack of diverse accommodations. Aside from camping and cottage rentals, there are few provincial parks with nearby resorts or hotels/motels (ranging from budget to luxury). The table below provides a summary of accommodation preferences by visitors from the primary Canadian travel markets around the world, as provided in Destination Canada's 2020 Global Tourism Watch data.

Table 10: International Demand for Accommodations

Accommodation Preference	Weighted Average
Mid-priced hotel / motel	44%
Resort	28%
Rented house, apartment, or condo	26%
Luxury hotel	26%
Budget hotel / motel	26%
Bed & breakfast (B&B)	26%
Home of friends or relatives	18%
Guest ranch, farm or lodge	17%
Camping or trailer park	11%
Own cottage or second home	10%
Hostel, university, or school dormitory	9%
Other	2%

The table above shows that mid-priced hotels/motels are the primary accommodation choice for international travellers (at 44%). The next most popular preferences are resorts (28%), then rented houses, apartments, or condos; luxury hotels; budget hotels/motels; and B&Bs (all at 26%).

The key to meeting the needs of international travellers is to provide a range of accommodation options.

One German tour operator said, "A big part of our clients prefer a slightly remote accommodation type such as smaller B&Bs, blockhouse style cabins etc. Our RV clients always prefer the park campgrounds over a private campground." The tour operator identified Riding Mountain National Park as a good example of a location with a range of accommodation styles (e.g., Lakehouse vs. Elkhorn Resort vs. B&Bs) within a small-town atmosphere.

Other tour operators highlighted the general demand for a range of mid-priced hotels, luxury hotels, and lodges, which are a good fit within a park setting. A UK-based tourism operator said, "Lodge-style accommodation located inside the parks is always a draw, providing a natural style of accommodation in a location that enables visitors to step straight out into nature and the amazing scenery without queuing to get into the park."

However, the tour operator highlighted that Manitoba Provincial Parks are not well-suited at the moment to meet these international preferences. He said, "We are limited in Manitoba with regards to the number and type of accommodation we can offer close to or in parks, which makes the parks' inclusion in itineraries difficult." These accommodation preferences will need to be addressed in order to grow the international tourism visitation numbers within Manitoba's Provincial Parks.

Looking at other countries around the world, the National Park (or equivalent) systems tend to provide more international-level experiences that are better suited for that scale of tourism. However, several jurisdictions do blur the lines between national and state, provincial, or regional parks. All of Québec's Provincial Parks, for example, are called "National Parks," which may help to attract international visitors. Australia also includes state parks under the "National Parks" umbrella. Investments and activities in regional or state parks are still generally targeted at domestic and regional tourism, with international visitors being funnelled more towards the major National Parks and reserves. The ability of Manitoba's Provincial Parks to attract international visitors is addressed more fully in other sections of this report.

Creating a Value Proposition

Manitoba's natural resources have gained some notoriety, with the opportunities to see amazing wildlife, such as polar bears and beluga whales in Churchill; visit spectacular cottage-country lakes; and partake in world-class fishing. Manitoba has attracted American fishers from all over the US for generations, who visit our northern lakes in the late spring and early summer for memorable excursions to catch walleye, trout, and northern pike. Aside from this angling market, however, Manitoba's natural features have not been a prominent tourist draw; parks are only a subset of those features (being excluded largely from both the whale and polar-bear sighting markets). To become a player in attracting the attention of significant numbers of tourists from other parts of Canada and the globe, Manitoba Parks would need to increase its focus on showcasing outstanding features. In the sections below, upgrades are identified that would help bring the assets of major parks to a standard that can operate to meet international expectations. This would create the opportunity to bring certain parks up to a standard that may be of more interest to outside tourists.

Improving attractions and accommodations will create an opportunity to increase the number of visitors to Manitoba's Provincial Parks. Tourists are attracted to "features" and specific elements. To resonate with tourists, outstanding "features" need to be properly packaged to effectively promote these attractions. These may include waterfalls, clear lakes, spectacular rocky shorelines, desert sand dunes, caves, and petroforms, as well as exploring to see quintessential Canadian animal species such as moose, elk, deer, bears, owls, or beavers. But the presentation of these attractions needs to be specific and stand out among thousands of other notable competing sites and features that tourists are experiencing across Canada and around the world. Improving how Manitoba parks' "features" are promoted will add value to the potential market for tourists from outside the province.

OPPORTUNITIES TO MEET EMERGING DEMANDS

Many provincial and state park jurisdictions focus on the interests of their local markets when offering new opportunities. It is believed that by meeting the demands of the domestic market, you will also attract the international market, as they tend to have similar interests as long as the "standard" or "quality" of service is sufficiently high. We were able to extensively survey the domestic market to determine their current and future interests. This data was used to identify future opportunities that not only satisfied the interests of Manitobans but also aligned with the trends identified in the best practice research and, therefore, should satisfy the interests of the international market as well.

During this study, potential park activities and experiences were identified and validated by Travel Manitoba and Manitoba Parks. The opportunities were then incorporated into the survey, where the public was able to rate each proposal. They were asked how much more likely they would be to visit a park if a new activity/experience was offered. The survey generated over 1,600 responses, which were analyzed to determine which activities and experiences are the most likely to increase visitation. The activities and experiences were categorized into three groups:

- 1) Tours and Nature-Based Experiences;
- 2) Activities and Site-Based Experiences; and
- 3) Accommodations.

The level of support was analyzed for each group based on gender and age to determine which opportunities

would attract which demographic. The results have been summarized and presented on the next page.

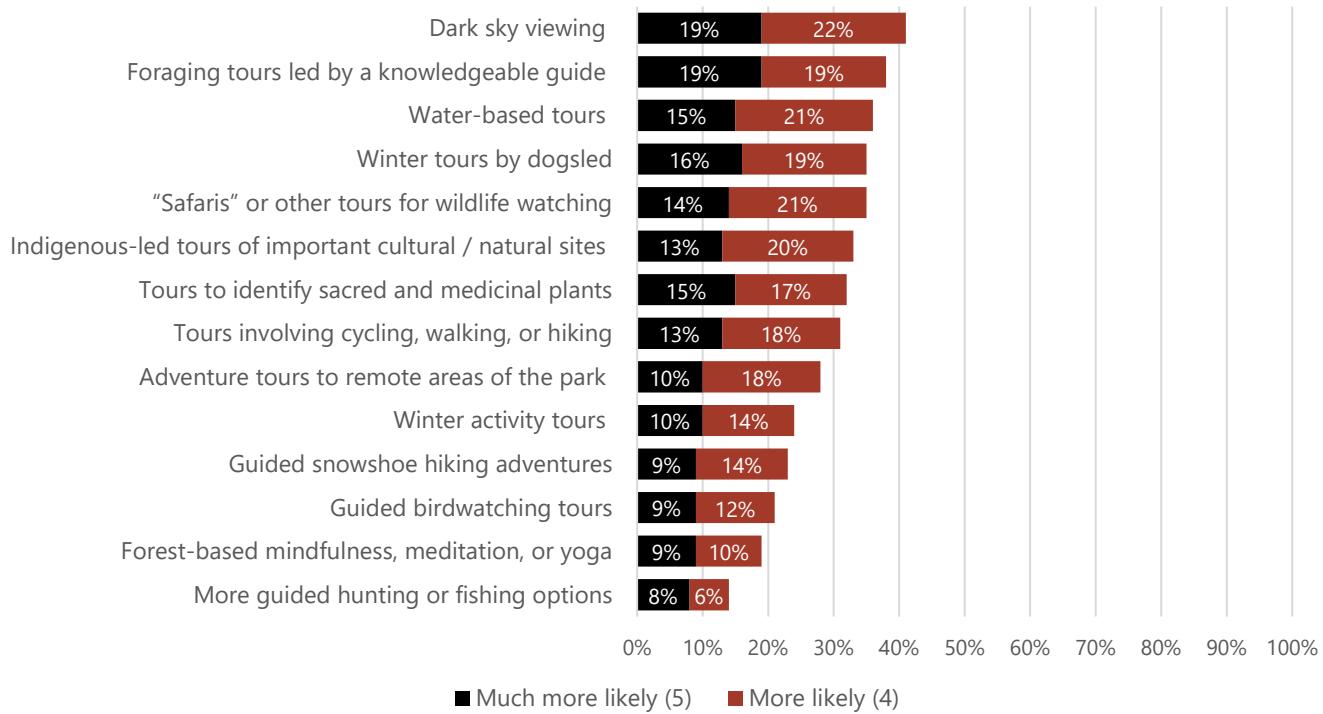
Tours and Nature-Based Experiences

Figure 19 shows the general public's reaction to 14 tours and nature-based experiences and the impact each might have on increasing visits to the parks.⁴¹

Overall, 3 in 4 Manitobans (76%) indicated that at least one of these 14 tours and nature-based experiences would encourage them to visit Manitoba's provincial parks more often.

Dark sky viewing was rated the most likely experience to increase visitation, with 42% of respondents stating they would be much more likely or more likely to attend parks that offered this experience. Foraging tours (37%), water-based tours (36%), dogsled tours (35%), and "safaris" (or wildlife watching tours) (35%) were the next-highest rated attractions in terms of increasing the public's interest in visitation. Activities that were rated the least likely to increase visitation included winter activity tours, guided snowshoe hiking, guided birdwatching, forest-based mindfulness, meditation or yoga, and guided hunting or fishing. Less than 25% of respondents felt that these activities would make them much more likely or more likely to visit the parks, but the survey results still suggest that there is a potential niche market for these types of experiences.

Figure 19: Survey Responses - Tours and Nature-based Experiences (n=1,614-1,638)



Many of these experiences would encourage more visits, even among those already using the parks. Campers, cottage visitors, day visitors, users of other accommodations, and non-Manitobans all rated their interest in these experiences similar to or greater than the general public. The only group that was not as motivated by these

⁴¹ The question read, "If each of these guided activities were available in some Manitoba provincial parks, how much more likely would you be to visit these parks? Use a scale of 1 to 5, where 1 means you would be no more likely and 5 means you would be much more likely to visit or visit more often."

experiences was cottage owners. That is partially because, on average, this group already spends about three months at their cottages in parks; therefore, while they might be interested in these tours and experiences, they are not as likely as other groups to increase their visits to parks.

Tours and nature-based experiences would most motivate those aged 18-29 to visit parks more often but would have the least impact on visitations among the 65+ age group. Similarly, on average, females rated these experiences higher than males in almost all activity groups. Dark sky viewing is the most popular attraction amongst all age categories, except for those 18-29 years of age, who rated winter tours by dogsled as their top nature-based activity. It is important to analyze these experiences by demographic to determine which one is most likely to attract the next generation of park visitors. More detail on the interests of each demographic can be found in Table 11 below.

Table 11: Tours and Nature-based Experiences by Gender and Age

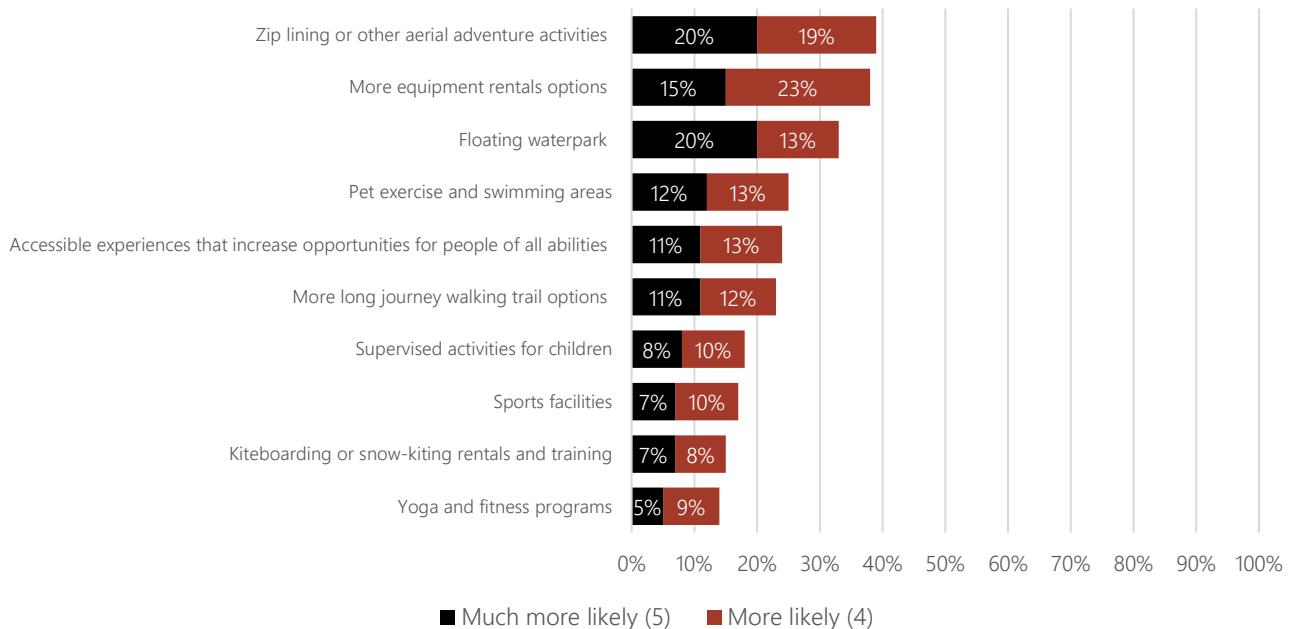
	Overall (n=1,614- 1,638)	Female	Male	18-29	30-44	45-64	65+
Dark sky viewing (e.g., guided excursion for stargazing, astrophotography)*^	42%	47%	35%	57%	44%	40%	27%
Foraging tours led by a knowledgeable guide (e.g., berry, mushroom, or wild herb picking) *^	37%	42%	31%	44%	40%	37%	27%
Water-based tours (e.g., kayak, canoe, York boat, or voyageur canoe)^	36%	38%	32%	50%	44%	33%	19%
Winter tours by dogsled*^	35%	40%	28%	66%	37%	27%	15%
"Safaris" or other tours for wildlife watching*^	35%	41%	26%	32%	34%	40%	31%
Indigenous-led tours of important cultural and natural sites in the park	33%	36%	28%	36%	31%	33%	31%
Tours to identify sacred and medicinal plants ^	33%	36%	28%	43%	32%	32%	22%
Tours involving cycling, walking, or hiking^	31%	31%	30%	41%	28%	33%	21%
Adventure tours to remote areas of the park (e.g., in a 4-wheel-drive van) ^	28%	27%	28%	40%	26%	26%	23%
Winter activity tours (e.g., ice fishing, winter camping, cross-country skiing, or hiking experiences) ^	24%	25%	23%	38%	29%	21%	12%
Guided snowshoe hiking adventures^	23%	24%	20%	39%	26%	18%	11%
Guided birdwatching tours	22%	23%	20%	21%	19%	23%	22%
Forest-based mindfulness, meditation, or yoga*^	19%	25%	11%	25%	24%	18%	10%
More guided hunting or fishing options ^	15%	13%	17%	18%	17%	14%	9%

*Note: * Statistically significant difference between genders. ^ Statistically significant different among age groups.*

Activities and Site-Based Experiences

Figure 20 shows the general public's reaction to 10 activities and site-based experiences. It also depicts the respondents who indicated that they would be more likely or much more likely to visit provincial parks if these activities or experiences were offered.⁴²

Figure 20: Ranking Activities and Site-based Experience (n=1,614 - 1,638)



Overall, 7 in 10 Manitobans (71%) indicated that at least one of these 10 activities and site-based experiences would encourage them to visit Manitoba's Provincial Parks more often or much more often.

Ziplining and other aerial adventures were rated the most likely site-based experiences to increase visitation, with 39% of respondents stating it would much more likely or more likely motivate them to visit parks. Increasing equipment rentals (38%) and installing a floating waterpark (33%) were the next-highest rated attractions in terms of increasing the public's interest.

Like tours, these activities received a similar rating among user groups when compared to the general public. The exception is cottage owners, who consistently rated each activity's draw below the other groups. Overall, the activities and site-based experiences were more attractive to those aged 18-29 and were least attractive in terms of encouraging greater park attendance among the 65+ age group. Women tended to rate these activities and experiences higher than men in almost all cases, although only three are significantly different: floating waterparks, supervised activities for children, and yoga and fitness programs.

Table 12 shows the breakdown of interest by gender and age for each activity. Overall, the addition of activities and site-based experiences is expected to attract a younger demographic to the park. This is in line with the results from

⁴² The question read, "If these activities were available in some Manitoba provincial parks, how much more likely would you be to visit these parks? Use a scale of 1 to 5, where 1 means you would be no more likely and 5 means you would be much more likely to visit or visit more often."

the tours-and nature-based experiences section. Therefore, it is expected that if both activities and tours are introduced to the parks system, it will help to attract the next generation of visitors.

Table 12: Activities and Site-Based Experiences by Gender and Age

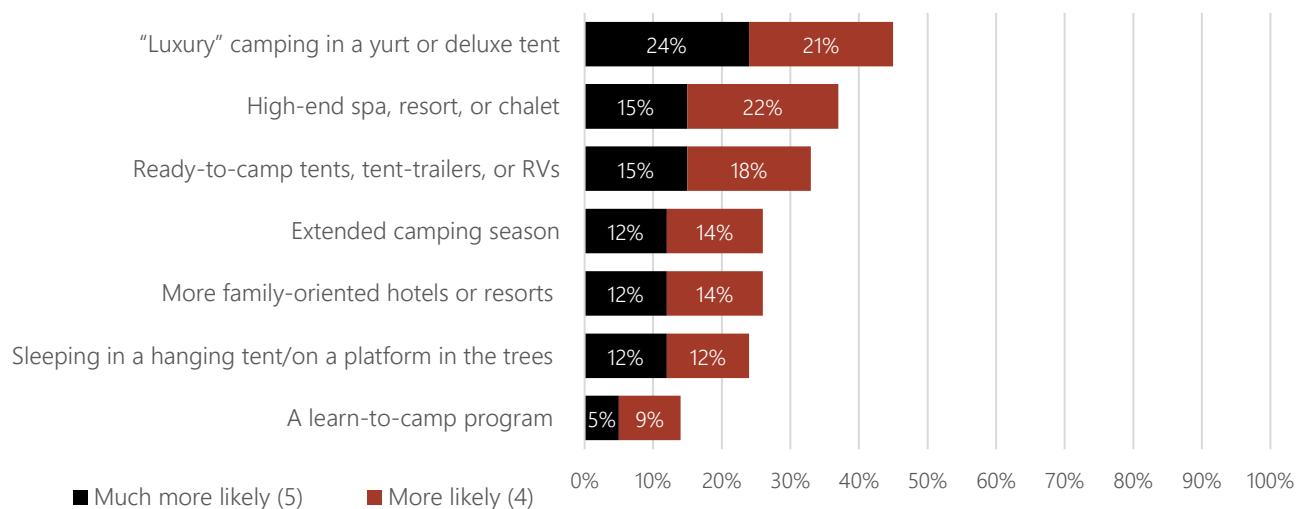
	Overall (n=1,592- 1,640)	Female	Male	18-29	30-44	45-64	65+
Ziplining or other aerial adventure activities such as treetop trekking, a forest ropes course, etc. ^	39%	40%	37%	57%	54%	31%	18%
More equipment rental options (e.g., ability to reserve or rent on-the-spot such things as skis, snowshoes, bikes, canoes, kayaks, etc.) ^	39%	41%	35%	57%	49%	33%	18%
Floating waterpark (i.e., an inflatable playground on the water for children and adults, with paths, games, slides, etc.)* ^	33%	37%	28%	41%	52%	26%	16%
Pet exercise and swimming areas ^	25%	29%	21%	34%	31%	23%	14%
Accessible experiences that increase opportunities for people of all abilities (e.g., sit-skis, tours in golf carts, outrigger kayaks, and other adaptive equipment)	24%	25%	22%	30%	26%	22%	20%
More long journey walking trail options (involving over-night stays) ^	24%	23%	24%	35%	26%	21%	13%
Supervised activities for children, such as day camps, swimming lessons, sailing/canoe lessons, etc.* ^	18%	21%	13%	12%	35%	14%	10%
Sports facilities (e.g., tennis, pickleball, or basketball courts) ^	17%	18%	15%	24%	19%	15%	8%
Kiteboarding or snow-kiting rentals and training^	15%	14%	16%	23%	23%	11%	5%
Yoga and fitness programs*^	15%	20%	7%	18%	19%	15%	6%

Note: * Statistically significant difference between genders. ^ Statistically significant different among age groups

Accommodations

Figure 21 shows the impact that various types of accommodations would have on increasing visits to provincial parks.⁴³

Figure 21: Ranking Accommodations (n=1,613 - 1,641)



Overall, 7 in 10 Manitobans say that at least one of these 7 accommodation types would encourage them to visit Manitoba's Provincial Parks more often or much more often.

"Luxury" camping in a yurt or deluxe tent (45%) and high-end spas, resorts, and chalets (37%) were the types of accommodations most likely to increase visitation to parks. These were followed closely by ready-to-camp tents, tent-trailers, or RVs (33%); extended camping seasons (26%); more family-oriented hotels or resorts (26%); and sleeping in a hanging tent or on a platform in the trees (25%). A learn-to-camp program generated the least interest (13%).

Accommodations received high variations in ratings among the different user groups. This was expected, as some user groups (cottagers) do not require accommodations, while other groups (campers) tend to prefer a very specific form of accommodation. Specific user groups rated some accommodations much higher than did their counterparts. Those already camping in provincial parks were the most interested in extending the camping season: 47% indicated that they would be more likely or much more likely to visit provincial parks more often. Cottage visitors (56%), day visitors (59%), and other accommodation users (61%) each indicated that they would visit parks more often if luxury camping was available. Day visitors (45%) and other accommodation users (47%) would visit parks more often if ready-to-camp tents, tent-trailers, or RVs were available. This suggests that creating a greater variety of accommodation types would result in more Manitobans visiting parks.

Accommodations were more popular among females than males, with the 18-29 and 30-44 age groups being more

⁴³ The question read, "If these types of accommodations were available in some Manitoba provincial parks, how much more likely would you be to visit these parks? Use a scale of 1 to 5, where 1 means you would be no more likely and 5 means you would be much more likely to visit or visit more often."

interested in these accommodations than the older age group.

Adding new accommodations to parks will help attract the younger and middle-age demographics who are looking for a luxury outdoor experience in a yurt or chalet. The level of interest in each type of accommodation varied significantly by type, with sleeping in a hanging tent being the third most popular attraction for individuals 18-29 and the sixth most popular accommodation for both the 45-64 and 65+ age group. Table 13 shows the breakdown of interest for each activity by gender and age.

Table 13: Accommodations by Gender and Age

	Overall (n=1,613-1,641)	Female	Male	18 -29	30-44	45-64	65+
"Luxury" camping in a yurt or deluxe tent with electricity, access to indoor plumbing, and with high-end amenities provided * ^	45%	51%	37%	53%	55%	40%	34%
High-end spa, resort, or chalet* ^	37%	41%	31%	45%	45%	33%	26%
Ready-to-camp tents, tent-trailers, or RVs (set up in the park campground and ready to use) ^	33%	36%	29%	32%	45%	31%	26%
More family-oriented hotels or resorts * ^	27%	31%	21%	25%	42%	21%	19%
Extended camping season (beyond May to October) ^	26%	28%	24%	29%	39%	23%	15%
Sleeping in a hanging tent (portaledge) or on a platform in the trees ^	25%	28%	21%	33%	41%	18%	9%
A learn-to-camp program where equipment can be rented and a park representative assists with set up ^	13%	14%	12%	17%	20%	11%	5%

Note: * Statistically significant difference between genders. ^ Statistically significant difference among age groups

Overall, survey results consistently show that the younger demographic is more interested in all three categories (tours, activities, and accommodations) than older demographics, with females, on average, being more interested than males. By adding new tours, activities, and accommodations, it is expected that Manitoba Parks will attract more domestic and international visitors of a younger demographic. This will help to create the next generation of park visitors, both locally and internationally.

Backcountry

We asked respondents about their interest in self-guided backcountry tours. Overall, among the general population, almost 6 in 10 (59%) indicated that they were interested (23%) or might be interested (36%) in such tours. Younger respondents were more likely to express interest in self-guided tours. Those already experienced in using parks tended to express more interest; approximately 7 in 10 cottage visitors, users of other accommodations, and campers each indicated their interest in self-guided backcountry tours.

Overall, among those who showed at least some interest, the most attractive types of self-guided backcountry tours

were summer-based, involving hiking or biking (64%) and canoeing or kayaking (47%). Fewer people were interested in winter-based, self-guided backcountry tours, such as ski/snowshoe tours (30%) or ATV/snowmobile tours (30%). The greatest interest in these activities came from younger age cohorts (under 45 years of age).

OPPORTUNITY ANALYSIS

The following analysis was conducted to create a better understanding of the value of pursuing certain development advantages for each park to better serve the goals of increasing visitation and materially impacting the improvement of financial sustainability.

Tours, activities, and accommodation experiences were ranked based on three key criteria to determine which experiences are most likely to have the greatest overall financial impact on Manitoba Parks as compared to each other. The three criteria were:

- 1) Value of Success: the expected benefit in terms of new revenue or additional visitation;
- 2) Ease of Implementation: how easy the experience is to develop/create;
- 3) International Market Appeal: how attractive the experience is to the international market.

The experiences were analyzed through one-on-one comparisons across all combinations. They were given ratings in all three categories, which were added together to determine the experience's overall potential. The experiences that generated the highest total accumulated ratings in each category indicate the best opportunities for Manitoba Parks. Survey results and international reports were consulted to inform the rankings of each experience.

Tours

Winter tours by dogsled received the highest ranking in the analysis results shown below. These 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. This ranking aligns with the survey results, which placed the experience as the fourth most likely to increase visitation. Safari and other wildlife tours, water-based tours, Indigenous-led tours and dark sky viewing rounded out the top five.

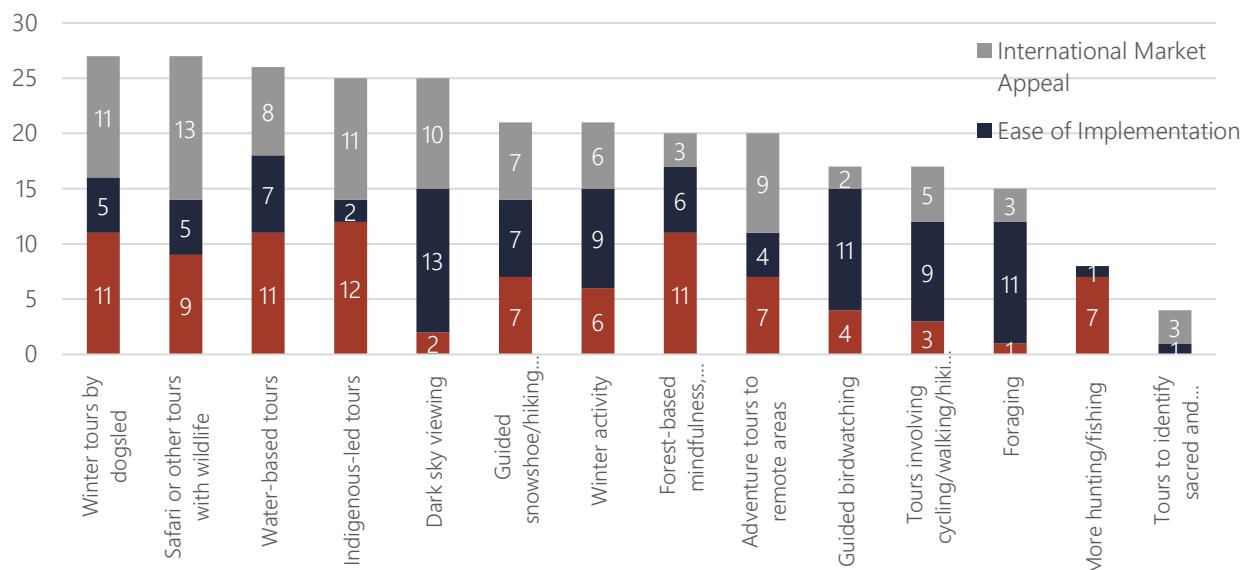
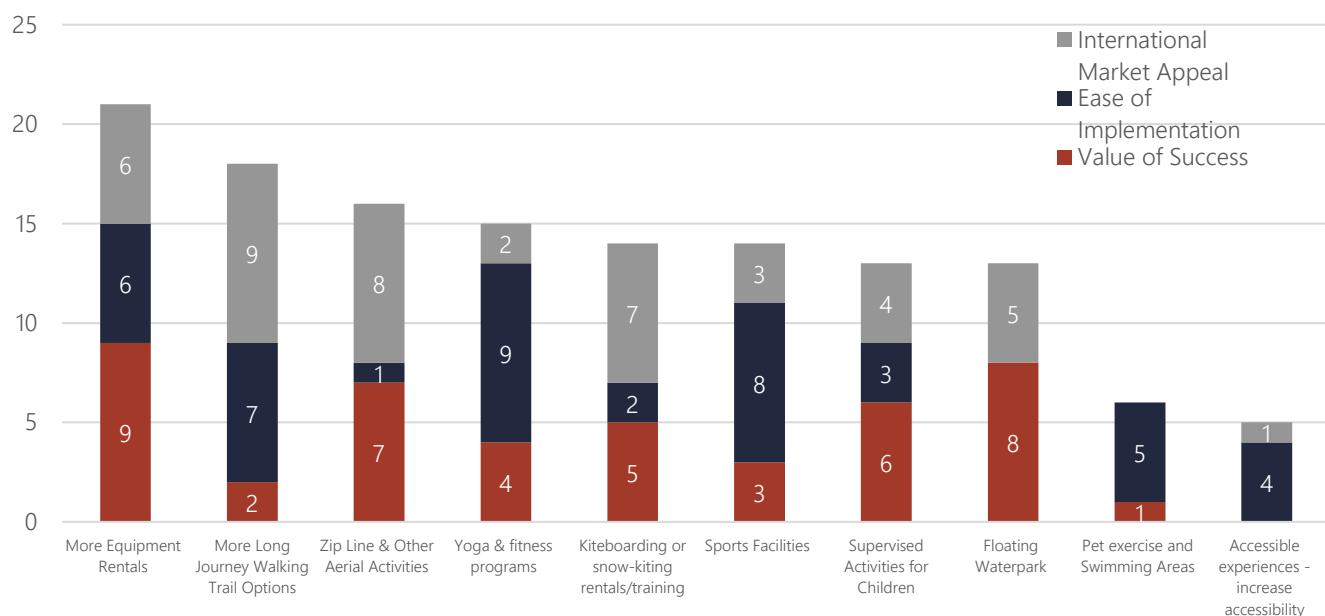


Figure 22: Prioritization of Tours

Activities

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 (including ziplining), yoga fitness programs, and kite boarding or snow-kiting were other top-rated activities. These rankings differ from the survey results, as the ranking system considers the economic impact of activities rather than interest levels alone.

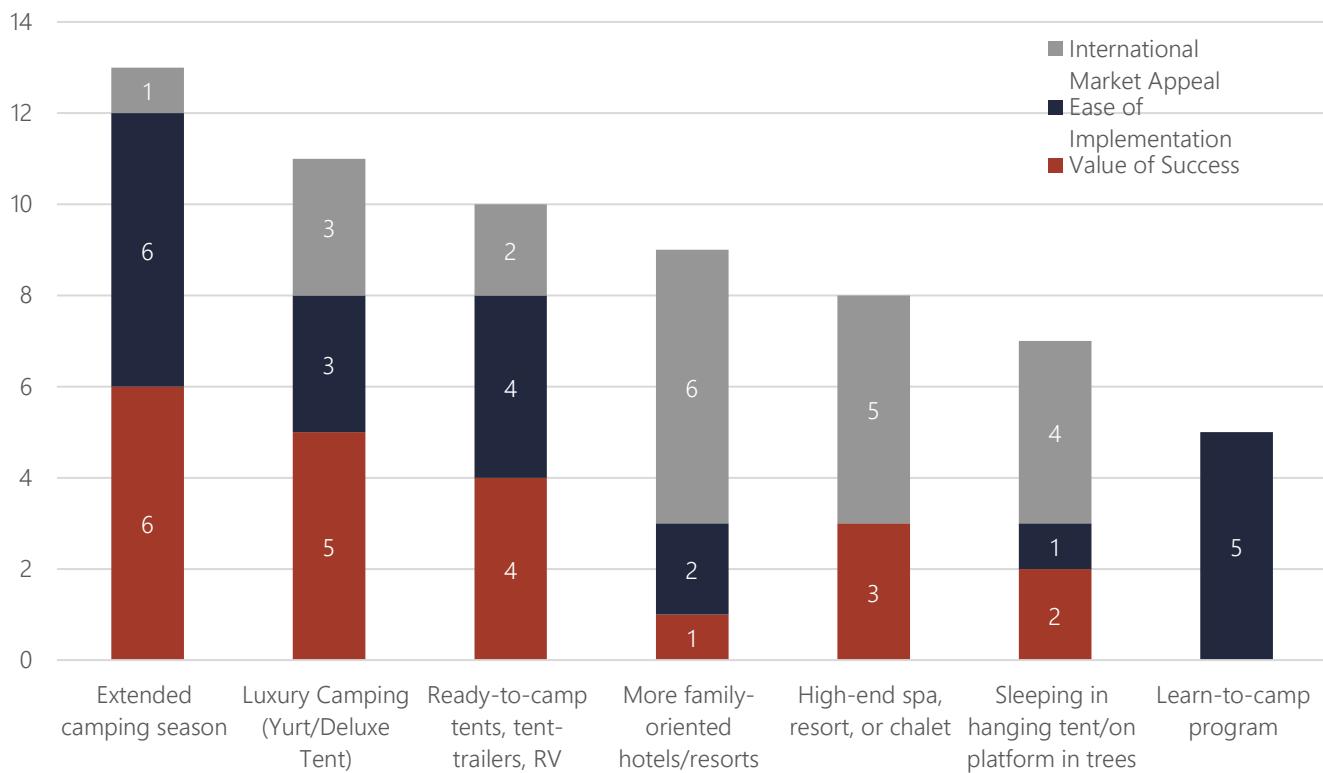
Figure 23: Prioritization of Activities



Accommodations

Finally, the analysis was conducted on accommodation options. Extending the camping season was the top-ranked accommodation option. Luxury camping was the next highest-rated experience, followed by Ready-to-camp tents, tent-trailers and RVs; and finally, increasing family-oriented hotels/resorts. As seen with activities, accommodations rankings differed from that of the survey.

Figure 24: Prioritization of Accommodation Options



Overall, these rankings show which tours, activities, and accommodations are the most likely to help Manitoba Parks generate more revenues and improve its overall sustainability.

SWOT ANALYSIS

An analysis of strengths, weaknesses, opportunities, and threats (SWOT) considers the internal factors (strengths and weaknesses) and external factors (opportunities and threats) that may have an impact on the success of Parks' visitor and recreation functions.

A SWOT analysis was conducted, using interviews, survey results, and existing data and reports to identify Manitoba Parks' strengths and weaknesses. Best practice research, international tourism data, and survey results were consulted to determine opportunities and threats facing Manitoba's Provincial Parks. Strengths and weaknesses of individual parks and regions were better understood through the Physical Assessment of Parks research that was conducted as part of this study (Figure 25).

The findings are summarized and presented below in Figure 25. This high-level analysis helps to best understand how to make the most of the strengths and opportunities that exist for Manitoba Parks, but also to ensure there are strategies and actions that will shore up weaknesses, where possible, and plan for external threats that Parks may face in the future.

Figure 25: SWOT Summary for Manitoba Provincial Parks



Strengths of the Manitoba Parks System

World Class Natural Assets

- Manitoba's Provincial Parks contain a variety of unique and stunning landscapes, including white sand beaches, the Canadian Shield, parklands, grasslands, and boreal forests. These exceptional natural assets are all accessible from Winnipeg;
- Manitoba's parks contain captivating wildlife, including Canadiana (Beavers, Great Horned Owls, Lynx), Megafauna (Moose, Caribou, Elk) and Raptors (Bald Eagles, Hawks), unique wild animals that fascinate both local and international travellers. These animals can be spotted from the province's world-class backcountry trails and campsites.

Well Established & Satisfied Customers

- The current parks system has received high praise from users, as determined through public surveys. Users of Manitoba parks believe that there is great value for their annual passes; campers, too, are extremely happy with the value they receive. This is supported by the high number of repeat campers, with the average camper attending Manitoba Parks for 23 years, with an average age of 48 years.

Exemplary Partners

- Manitoba parks contain several commercial operators who offer exceptional services to the public, adding to the positive visitor experience. These establishments help differentiate Manitoba parks and attract visitors. "Friend of" groups also help Parks to offer the best visitor experience possible, with many offering operational support, including operating campgrounds or maintaining trails.

Operational Excellence

- Parks staff provide critical municipal services to over 6,000 cottages annually, including providing drinking water, garbage removal, wastewater treatment, and general maintenance. They also manage approximately 6,145 campsites, including 4,608 nightly sites and 1,537 seasonal sites across Manitoba.

Infrastructure & Facilities

- Manitoba Parks has maintained its facilities with limited capital. The parks have been able to offer high-quality experiences to their visitors with limited available funds for investment in capital renewals and replacements. When investments are made, they are thoughtful and strategic, as shown by the recent accessibility upgrades made in certain parks.

Human Capital

- Manitoba Parks is made up of highly skilled individuals who maintain the right skillset to manage park operations. Employees have strong conservation and operation capabilities, which helps them to offer a quality park experience on a restrictive budget.

Weaknesses within the Manitoba Parks System

Visitor Attraction

- Parks has outdated visitor services, including an outdated website that is difficult to use. There are few tools available to help prospective visitors plan their trips, especially in the backcountry, and there is limited information about what to expect at a Manitoba Provincial Park. The reservation system is slow and often experiences issues;

- Manitoba Parks lacks a brand identity, as there is very little "Parks" specific advertising and no merchandise branded materials offered within or outside of Parks. Additionally, there is little effort to "sell" the parks' natural assets and experiences to potential visitors;
- Manitoba parks' diversity of natural environments, a key factor in distinguishing the province from its competitors, is not sufficiently emphasized;
- Manitoba's Provincial Parks are relatively unknown outside of Manitoba.

Visitor Experience

- Parks inconsistently meets visitors' expectations with individual parks, offering services at different levels (i.e., different standards of facilities, cleanliness, campsite standards, etc.). Varying service levels factor into the uneven distribution of parks utilization, with some parks being over-subscribed while others receive little visitation. Over-crowding of parks was listed as one of the top barriers to visitation, according to park visitors;
- Operators within parks are not required to follow quality standards and are not trained to be ambassadors for park experiences;
- There are limited experiences offered by Manitoba Parks outside of camping and hiking;
- Day passes are seen as poor value for money, despite being one of the most popular options;
- Visitors find the reservation system to be a pain point.

Business Environment

- Business decisions/licensing within parks are not focused on recreation or tourism; they are focused on following policy and procedure, with good ideas and/or potential partnerships necessitating requests for proposals (RFPs). This disincentivizes innovative thinking and the business community's desire to work with Manitoba Parks;
- The current business licensing process does not select the highest quality operators and is more regulatory in focus. It lacks clear standards of expectations for business operators and any accountability mechanisms;
- Current business operators offer inconsistent levels of service, and there is little incentive for operators to improve service offerings, as there is a perception of exclusivity within parks and current operating contracts lack any accountability mechanisms.

Planning & Management

- Park management plans are outdated, which has led to the deterioration of park infrastructure and created a need for significant reinvestment into parks;
- Backcountry sites and routes have not been maintained, which has led to the overuse and degradation of natural environments. This has prevented Parks's ability to commence the business of approving backcountry tourism operator licenses and realize the related potential revenue, both from these licenses and from back-country site bookings and park passes. This lack of control, definition and licensing makes it difficult for tour operators to be confident in the value of this business and the knowledge that the condition of park trails is actively managed.

Infrastructure & Facilities

- Parks's infrastructure has aged, as there has been limited investment in capital renewal and replacements, with any upgrades focused on critical elements such as wastewater, drinking water and washrooms. This has led to inconsistency in service levels and facilities;

- Limited investments have created service issues, with several parks being unable to meet the electrical needs of RV units and major infrastructure reaching capacity (i.e., wastewater treatment centres);
- Much of the signage and way-finding supports are not up to the standards expected of visiting tourists;
- Accessibility upgrades have been limited and have lacked clear communication to the public;
- There are limited venues for interpretive programming;
- There are limited accommodation offerings to meet the needs of international and out-of-province visitors. Limited staff accommodations impact operators' abilities to meet current demands and/or expand.

Human Capital

- Parks is not hiring for "business function needs," which includes marketing, promotion, attracting new customers, finding financially sound new offerings and products for tourists, etc. Currently, the focus is mainly on park maintenance and municipal-type servicing;
- Current staff are seldom visible to the public, as there are few engagement opportunities between park staff and visitors. This is due to a lack of interpretive programming and limited staffing resources related to budget restrictions. The lack of staff visibility projects an image that no one is managing Manitoba's parks.

Opportunities

International

- The world has become more environmentally conscious and focused on sustaining nature and natural resources. This has led to increased interest in nature-based experiences, including shoulder season activities and authentic Indigenous cultural experiences;
- The interests of international travellers strongly align with Manitoba's Provincial Parks. Interest in wildlife and nature-viewing activities rank highly. Offering additional accommodation options and appealing packages would encourage additional international visitation to parks as an add-on to Churchill trips or business-focused travel.

Domestic

- Canadians are demanding more large group sites, including picnic areas with shelters and group campsites, to hold outdoor gatherings;
- Manitoba has a strong entrepreneurial spirit that can be tapped into to create new and exciting services within parks;
- There are numerous cultural events and festivals in Manitoba that are either currently held or have the potential to be held in parks;
- RV ownership is on the rise, creating an opportunity to extend the camping season, as RVs are equipped to handle uncomfortable weather conditions. Increasing the availability of serviced sites would also increase RV usage of parks and encourage longer stays;
- Glamping, yurt and cabin rentals are in high demand in Manitoba's Provincial Parks. Increasing the availability of same would increase park revenues, encourage new users and provide additional opportunities for out-of-province travellers to experience Manitoba's parks;
- Survey results indicate that there is a high demand for additional operator-based activities within parks, including dark sky viewing, dog sledding, ziplining, equipment rentals, etc. Addressing this demand will increase Parks's revenue, encourage new users lengthen visitors' stays in parks.

Global (International & Domestic)

- Millennials are interested in spending their disposable income on experiences, including nature experiences such as glamping (luxurious camping). We also see a demand among millennials for branded materials that tell a story, such as merchandise from an experience. Both international and domestic markets tend to research, plan, and book trips online, creating an opportunity to target both markets through the internet and on social media.

Financial

- First Nations are looking to invest in economic development and job creation. They may be a potential partner with whom Manitoba Parks could work to offer new, unique experiences;
- There is potential for Manitoba Parks to receive federal funding in the form of COVID-19 recovery infrastructure funding;
- There is untapped potential for partnerships & sponsorships with other jurisdictions and private businesses to support park activities. This may involve Manitoba Parks partnering with camping equipment companies to offer “learn how to camp” programs, as an example;
- There is an opportunity to diversify Parks’ customer base by attracting new Canadians, young families and the next generation of campers through new programming such as “learn how to camp” experiences.

Environmental

- Climate Change has increased the number of hot, dry days each year, leading to a warmer and dryer climate in general. This creates the potential to extend the “peak season” for camping and park activities.

“New Normal”

- COVID-19 restrictions have introduced new demographics to parks, meaning there is an opportunity to retain these individuals and increase park utilization, which reached a new high in 2020.

Threats

International & Domestic

- As technology continues to develop, so too do alternative activities vying for people’s attention. Parks faces the threat of increased competition as the availability and variety of experiences and activities grows;
- There is a perception that parks are a space for conservation and therefore should not be developed. This public perception is a threat to Parks, as many potential visitors may stay away from parks and not support their development;
- Competition for visitors, partnerships/sponsorships and events continues to grow as the number of private parks/campgrounds increases. Competition, to host events, including concerts and festivals, has also increased as alternative venues continue to be developed;
- There are other areas around the world that have thousands of outstanding features and experiences to offer tourists. Although Manitoba’s selection is amazing, it is still challenging to stand out from some of those other jurisdictions;
- Some of Manitoba Parks’ most outstanding experiences are relatively expensive to journey to (in the North), and although part of their appeal is their remoteness, the threat is that travel to these destinations is too expensive and takes too long, causing many tourists to be unwilling to visit.

Financial

- There is an increased demand and scrutiny on how public dollars are spent, which may reduce funding to nonessential services such as parks;
- The current Provincial Government is debt-conscious and has prioritized financial sustainability, which threatens the allocation of dollars towards nonessential services such as parks;
- Other jurisdictions are able to offer more unique experiences and higher-quality services to visitors as they invest more into their parks systems;
- More remote locations are expensive to support and also tend to attract fewer tourists.

Environmental

- Climate change has increased the frequency and intensity of extreme weather events, including wildfires and droughts, which can negatively affect the use of parks. Climate change has also affected the winter, making temperatures and snow conditions unpredictable which can affect service offerings;
- Natural resources have started to decay due to mismanagement and over-pollution, including in Lake Winnipeg, which now suffers from algae blooms. The depletion of natural resources affects Parks's ability to offer specific services and experiences.

A Plan for the Renewal of Manitoba Parks

This study has identified several overarching success factors for consideration in the future successful functioning of Manitoba Parks:

- Re-invest in park infrastructure and upgrade and modernize existing tourist assets in key parks;
- Create new activities to enhance the visitor experience even further;
- Encourage investment in accommodations to meet visitor expectations at key locations and provide opportunities for visitors to spend more time in parks and lengthen the activity season, resulting in increased visitor spending overall;
- Attract growing numbers of Manitobans, other Canadians, and international tourists through active marketing;
- Provide a higher level of service to visitors/tourists, both with technology and with enhanced on-the-ground service in key parks;
- Ensure pricing is competitive and fair to permit access for all, but maximize the opportunity for revenue generation where possible.

The following represents a list of fifteen key recommendations of the actions and activities that need to take place to support the renewal of parks. These recommendations are a culmination of research drawn from each of the study sources, as well as the analytics conducted in previous sections, and consolidated through the SWOT analysis.

1) Strengthen Planning Capacity with Manitoba Parks

A crucial first step in understanding which parks can accommodate increased visitation and new activities is updating individual park management plans to reflect both the current objectives of Manitoba Parks and changes in how visitors use and wish 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. Planning should include a “whole of government” approach so that Parks can maximize the benefits of including other areas of government, which can and will contribute to the success of Parks’s renewal.

2) Modernizing Park Assets & Infrastructure

Modern visitors have a baseline expectation for park assets and infrastructure that is currently inconsistently met in Manitoba’s Provincial Parks. For Parks to play a meaningful role in the tourism industry, park assets and infrastructure need to be modernized to at least meet that baseline. These expectations include clear wayfinding signage; clean washrooms, change rooms, and shower facilities; and modern amenities such as electrical outlets in campgrounds, WiFi and, in some cases, modern interactive interpretive features. This is not to say that every park must have completely modern facilities, as baseline expectations fluctuate based on the location and nature of a park. For example, remote or wilderness parks are expected to be more rustic than major destination parks with high diversities and densities of activities. The volume of visitation to a major destination park will require more modern amenities and higher-quality infrastructure. A park’s assets and infrastructure need to align with the expectations of its target market. For some parks, this may mean more frequently graded gravel roads, while in other cases, the paving of a previously gravel road will be required. Certain parks would benefit from a modern interpretive centre with interactive displays and meeting rooms capable of hosting a wedding or corporate event. The level of modernization required will be determined by visitor expectations, the desired level of utilization, and the type of park (backcountry vs. recreation).

3) Become a Market-Focused Organization

There are several aspects to significantly increasing Manitoba Parks' approach to attracting visitors. The sub-items below are the key elements that came out of this study's research and form the basics of an effective market approach as required by Manitoba Parks to present its offerings to visitors and tourists.

a) Partner with Travel Manitoba

To elevate the top parks and maximize the benefit of investment into the Parks system, a marketing strategy needs to be developed. Dedicated resources must be secured to implement that strategy, and Travel Manitoba already has the experience and expertise to excel in marketing parks. This presents an opportunity to partner with Travel Manitoba, whose distinct function is to market and brand Manitoba's tourism attractions, including parks, to the rest of the world. The exact arrangement of the partnership is yet to be determined, but an agreement should leverage the experience, skills, and existing relationships within Travel Manitoba to support the development of branding, content marketing (photography and videos), marketing strategies, promotional and merchandising plans, and social media campaigns to attract domestic and international visitors to Manitoba's Provincial Parks. Taking a collaborative approach that embeds the objectives of Manitoba Parks into Travel Manitoba's broader strategies and campaigns would allow both groups to create value for the entire province.

b) Create a Manitoba Parks Brand

Manitoba Parks requires the development of a distinct and clearly identifiable brand with an identity that communicates the values of the parks system and tells a compelling story about why experiences within Manitoba's parks are unique. This is central to establishing the parks system as a recognizable premier tourist destination.

c) Develop Manitoba Parks Merchandise

In addition to helping Manitoba Parks tell their story, a distinct brand identity will create additional opportunities for new revenue streams through the sale of merchandise. This brand identity will allow Manitoba Parks to connect with their customers and potential visitors through storytelling, emotional marketing and evocative graphic design. The connections between these images and souvenirs and merchandise can add significant value to the tourism dollars spent in parks. The success of Ontario Parks's branding process extends beyond their overall system brand, through the development of individual park crests that can be collected in an Ontario Parks Passport and only purchased by visiting each park's shop. This encourages visitors to venture further afield than they may have done otherwise. A similar approach, with logos or patches (communicating distinct natural features, cultural landmarks or outstanding experiences) that can only be found in that one park, motivates visitors to explore all corners of the parks system. Parks in New Hampshire promote an extensive selection of merchandise at their retail outlets and online. Merchandise should only be available within the parks themselves, creating exclusivity and increasing visitation to underutilized parks.

d) Create a Manitoba Parks Website

The development of a standalone Manitoba Parks website is essential. The website must be user-friendly, easy to navigate, and distinct from the Government of Manitoba's outdated online structure, with a focus on acting as the first point of contact for potential visitors. Customer/tourist expectations are now very high, and it is difficult to impress them on this front; however, it is absolutely critical that Manitoba Parks is successful in this area in order to become a serious contender in this market. The current website relies too

heavily on links to static (PDF) documents and requires a certain level of knowledge about the Parks system to navigate. A user-friendly and visually inspiring platform that allows users to "explore Manitoba's parks from home" while they plan a potential visit would make parks more accessible to Manitobans and more attractive to visitors from afar.

The new system/website should allow customers to research travel itineraries, including information on experiences, accommodations, etc. for each park and offer a modern, easy-to-use booking system for all park activities, tours and accommodations. As RVs continue to grow in popularity, the website should include RV touring routes/loops to different parks. Information around accessible services at each park should also be provided. This new website should inspire visitation with breathtaking imagery and videos that showcase the experiences waiting to be found in Manitoba's Provincial Parks.

e) Have An Integrated Online Reservation System

The current online reservation system requires a prior understanding of Manitoba Parks. It struggles to manage the volume of reservations and is not user-friendly by current standards. Additionally, administration fees increase costs to visitors with no direct revenue benefit to Manitoba Parks. In the spring of 2021, first-day booking attempts crashed the reservation system, and conversations on social media indicated that many potential visitors were unable to secure bookings for their desired dates or locations.

An updated system should:

- 1) Allow for interactive searches (by geographic area, desired experience, landscape, or with an interactive map);
- 2) Accommodate multi-day bookings across different accommodation types (whole-trip planning);
- 3) Integrate third-party accommodation providers (AirBnB, local hotels and resorts, etc.) and approved tour companies;
- 4) Integrate backcountry reservations and check-ins;
- 5) Generate revenues to support the parks system.

4) Ensure Equitable Access

As Manitoba 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 who do not have equipment will provide greater equity to visitors to Manitoba's parks.

Some potential strategies to maintain access for all Manitobans are:

- Provide Park Vehicle Passes at no cost through partnerships with public libraries across the province;
- Limit the fee increase for basic sites while charging cost-recovery, or more, on serviced sites and fixed-roof accommodations such as yurts;
- Seek sponsorship to fund programming that connects low-income or new Canadian families with opportunities to experience Manitoba's parks through an equipment library and/or a learn-to-camp program;
- Improve and add trail segments that better accommodate visitors with mobility challenges (in New Hampshire, major trail networks contain specific trail segments designed to accommodate wheelchair access).

5) Charge Fair Market Rates

Manitoba parks have some of the lowest access and usage fees in Canada, as per Best Practices research findings. This means Manitoba Parks has a low recovery rate on their operating costs in comparison to some other jurisdictions (the Province of Québec recovers approximately 80% of its operating costs, Ontario up to 95%. The state of New Hampshire recovers virtually all of its costs). While the current low pricing model benefits local visitors from Manitoba, 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 price increase to park-vehicle passes and camping fees would increase the recovery rate in individual parks and ensure park spaces are well-maintained with modern infrastructure.

A change in rates may be a difficult sell to Manitobans, but if the increase is rolled out incrementally over an extended period and communicated alongside park infrastructure improvement announcements, it could be more palatable to the visiting public. It will be important that there are experiences within Manitoba parks that remain financially accessible to those with low incomes.

6) Extend the Camping Season

With a high demand for camping and the increased usage of RVs, the Manitoba camper is willing to camp earlier in spring and later into fall. As numbers of international tourists grow in the spring, fall and winter, a new market of potential park visitors/campers has emerged for the extended camping season. Other jurisdictions have adjusted fees and service levels in shoulder seasons in select locations to capitalize on the niche demand while reducing operating costs.

7) Diversify Customer/Visitor Base

There is a need and opportunity to diversify Manitoba Parks's 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 young families and children how to camp and connect with nature. Manitoba Parks can pursue partnerships with private sector organizations to donate equipment and supplies, and possibly sponsorship, to offer such a program.

Expanding the current activity offering within parks is another strategy that will help to create a more diverse customer base. Providing opportunities to rent a wider variety of equipment from park operators will help to attract a broader array of individuals to parks.

Increasing the availability of soft-sided accommodations, including yurts, will help to attract the next generation of park visitors, as younger generations (millennials) are interested in these types of comfortable camping experiences.

8) Improve Wastewater Capacity

Increased visitation is further limited by issues like wastewater lagoon capacity. Some parks struggle to manage seasonal demands on wastewater treatment through Parks-managed lagoons. Updated management plans that address both the short and long-term must account for the additional volume of wastewater that must be processed to allow for increased visitation. This is recognized as a significant investment and will require the involvement of a "whole-of-government" approach to ensure growth is not limited by a lack of utility resources.

9) Implement Managed Access to Backcountry

One of Manitoba's greatest natural assets is its extensive system of lakes, rivers, and boreal forests. Currently, there

is a limited number of designated backcountry routes, which tend to be heavily subscribed in peak seasons and are running the risk of being overused and unnecessarily degraded. In this study's research, hiking was found to be one of the most desirable features sought by visitors (ahead of beaches).

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. The flipside is that access would be limited to registered users. Individual park management plans will dictate whether site reservation, zone booking, or a quota system is the best method for managing access to specific backcountry areas. By managing backcountry access, Manitoba Parks can ensure sustainable long-term use of these natural assets that generates revenues to cover operation, maintenance and compliance costs. Additionally, 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. If reservation and check-in requirements can be handled online, the cost of implementing this program would be limited to the staff required for route and site maintenance and compliance.

10) Strengthen the Capacity to Manage and Develop Operator Relationships

High-quality visitor experiences within Manitoba parks are heavily influenced by the quality and diversity of accommodations, services and experiences provided by commercial operators. It is essential that Manitoba Parks increases its capacity to support existing operators, develop relationships with new operators and foster an environment that encourages entrepreneurship and high-quality customer service standards. It is important for Parks to view commercial operators as essential partners in the success of the parks system.

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 high-quality functioning and service of its partners within its parks. This system is beginning to be used by other jurisdictions (much like an ISO certification). In addition to these policies, Manitoba Parks needs to be able to communicate a clear value proposition to operators so they may appreciate the privilege and see the advantage of operating within park boundaries. Parks should commit resources to fostering these relationships and provide targeted supports to encourage existing operators to expand and improve their offerings while attracting new, quality operators to actively improve the visitor experience.

Parks may consider offering marketing support to key partners and providing liaisons to help with navigating the unique regulatory requirements of operating in Manitoba parks. Manitoba Parks's management team must ensure they help streamline the review and approval process to ensure that quality ideas that would improve visitor experiences while aligning with the strategic priorities of Manitoba Parks are not unnecessarily delayed and can further foster a sense of entrepreneurship in parks.

Parks should implement programming to educate business operators on park sustainability, operations and general park knowledge, making them more active park ambassadors. The completion of this program would be required of all park operators to ensure they provide a consistent level of quality service to visitors. The program would transform business operators into park ambassadors, further ensuring that development and operating standards are consistently maintained.

11) Increase Park-Run Accommodations

Campground and yurt utilization data indicates that visitor capacity in parks has flatlined over the last few decades, while reservation bottlenecks indicate that there is latent demand unsatisfied by current supply. Parks's revenue generation is predominantly driven by campsite fees, comfort camping reservations, and associated park vehicle pass sales. To increase visitation and associated revenue, Parks needs to increase the number of accommodation units (campsites, yurts, etc.), revenue per unit (reservation fees), and the quality of experiences surrounding camping to encourage deeper market penetration.

Difficulty in accessing park accommodations is a barrier to growth. The current available options require substantial pre-planning and knowledge of the system to secure a campsite or comfort camping unit booking (i.e. a yurt or cabin) for peak periods such as long weekends. Potential visitors must attempt to book their desired Manitoba Parks accommodation in a "rush" on the day reservations open for the season, which does not guarantee they will secure their desired booking, even if their dates are flexible.

Due to COVID-19-related travel restrictions, Manitoba Parks's accommodations saw peak utilization, resulting in:

- 13,731 comfort camping nights in 2020 (24% increase from the 2017–2019 average); and
- 305,000 campsite nights in 2020 (37% increase from the 2017–2019 average).

Only group camping bookings were lower than previous years, but this was related to gathering-size restrictions for certain periods of time, which kept these sites closed and unavailable for reservations.

The three (3) year average annual number of comfort camping nights for 2017 through 2019 was 11,048, which is only 24.3% less than the unprecedented 2020 camping season. If 2020 is considered the maximum practical annual supply for comfort camping, the previous three (3) year average represented over 80% utilization of Parks's available supply.

To improve sustainability and grow visitation, the capacity for camping and comfort camping must increase. This will allow for greater satisfaction from existing visitors and the attraction of new users from all markets.

12) Add Staff Accommodations

Commercial operators have indicated that staff housing 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 such as the southern Whiteshell. Manitoba Parks should work with local chambers of commerce to find solutions to this challenge. One option is to provide either rental accommodations or land on which operators could develop their own accommodations for rent by either Parks or non-Parks staff. Another option is to allow for a certain number of units in or near a new hotel or resort in the Whiteshell to be reserved long-term for staff that work within the park. Improving access to staff housing will allow commercial operators to grow and improve, therefore increasing available accommodations and incentivizing diversified offerings that strengthen the visitor experience.

13) Grow Partnerships with Indigenous Nations, Organizations and Individuals

All Manitoba Parks are located on Treaty land and within the traditional territories of Indigenous Nations. Manitoba Parks must do more than consult with Indigenous communities and organizations by increasing efforts to work towards models of Indigenous partnerships, promote Indigenous entrepreneurialism in parks, and find opportunities for Indigenous management in parks, as seen elsewhere around the globe (i.e. in Australia and New Zealand).

There is a local and international demand for Indigenous tourism experiences. Parks must support Indigenous entrepreneurs to provide specific, unique experiences within parks.

14) Increase Partnerships with Local Communities

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

Travel Manitoba's Place Branding program works with regional businesses and organizations to create a single brand for a destination, which is then extended to all offerings and interactions through the development of a strong supporting marketing program. This initiative is beneficial in that it brings relevant parties together (accommodations, hospitality, attractions, and services) within a destination area to address opportunities and challenges in attracting tourism.

Manitoba's Provincial Parks provide the outdoor experiences and recreational pursuits of hiking, cycling, paddling, camping, water and winter activities, access to nature, and locations for cultural programming that neighbouring communities value as key drivers for visitation. 78% of Place Brand survey respondents indicated that having a provincial park in close proximity to their community was extremely or very important in attracting visitors to their area.

Partnering with local and Place Brand communities may support park sustainability as people are drawn to the region in general, becoming, in turn, more significant users of parks and surrounding services, thereby increasing Parks's broader overall economic impact on the provincial economy. Local communities adjacent to or within parks often fill critical gaps in accommodations and services that may not be offered within the Provincial Park itself.

15) Encourage "Friends Of" Groups

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 all 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 (the parks system in the State of New Hampshire relies heavily on well-developed "Friends Of" relationships to carry out critical activities and fundraising events).

These groups rely on passionate community members and pools of volunteers; therefore, they cannot be established or "forced" by Parks. Manitoba Parks's role is to ensure that interested individuals or groups see the benefits of forming their own Friends Of group. Support could be provided by including a link on Parks's website for interested potential groups or by developing a network that allows Friends Of groups across the province to share best practices and support each other.

16) Improve Financial Sustainability

For Manitoba Parks to be more financially sustainable, it must be able to manage and match the result of investments and improved service with improved revenue (and better recovery). It is difficult to account for this and motivate management unless there is some control of both the revenues generated by Parks and the reinvestment in Parks within the same budget. Not all parks within the system will be able to recover all their operational costs, nor should they be expected to do so. It is reasonable to think that some portion of Parks's activity is rightfully seen

as provincial contributions to the well-being and quality of life of all Manitobans. Better-performing parks should be rewarded for their strong financial performance while still supporting the system. There needs to be a mechanism for the transparent allocation of revenues that, where the opportunity exists, supports improvements in financially viable parks to enhance Manitoba tourism, while continuing to support parks with lower visitation as part of the province's overall tourism ecosystem. To be viable, where there are opportunities for market returns from park activities, Parks should ensure that those opportunities are maximized to protect the future viability and continued operation of its system.

Park Prioritization

In recent years, Manitoba Parks has conducted analyses across 92 parks to consider those that are most likely to benefit from efforts to attract more visitors and better serve those that already frequent the parks. This has led to a better understanding of the appropriate functionality of each park, and that "all parks are not created equal." As part of this study, we have used that same basis in an effort to focus on those parks that best serve our goals to increase visitation, attract tourists and improve the sustainability of the overall system. Below, a process that prioritizes focusing on those parks that can have the greatest impact is outlined. Criteria are created, parks are evaluated, and a smaller group for greater focus is created and further analyzed.

Prioritization Criteria

Eight (8) criteria were used to analyze all of Manitoba's Provincial Parks to determine which had the greatest potential to improve Parks's sustainability and visitors' experiences through increased investment. Analysis was conducted and parks were prioritized into a list of the top 6 and an additional 9 (for a total of 15) that hold secondary potential. All criteria were evenly weighted in the analysis and are listed below:

- Quality of Natural/Heritage Features
 - A park's main attractions and competitive advantages are the natural or heritage features that are both unique and magazine-cover worthy. For any single park to rise to the top of the long list of astounding Manitoba parks, it needs to have world-class natural assets. Uniqueness, scale, and international appeal contributed to the assessment of the quality of each park's natural or heritage features.
- Tourism Opportunity Areas
 - To improve sustainability, investments need to result in increased visitation to and utilization of parks. Each park was analyzed to determine which was best able to attract tourists due to its natural resources and potential for service offerings;
 - This speaks to the alignment with the tourism opportunity areas identified in Travel Manitoba's strategic plan, including the potential for Indigenous, Francophone and other cultural experiences, as well as winter and water-based experiences, and the showcasing of a diverse range of wildlife.
- Diversity of Activity
 - A density of activities from which to choose improves the attractiveness of investing in parks, since a greater variety of activities means a greater ability to attract a variety of individuals with varying interests. Thus, parks with the potential to offer a wide array of activities are better able to use investments to create multiple experiences that will increase visitation and the overall sustainability of Manitoba Parks.
- Proximity to Population
 - Population centres act both as sources of domestic visitors and hubs for international tourism. Proximity to any given population indicates the size of the market that has convenient access to a specific park. Parks located closer to major populations are more likely to receive high visitation numbers and therefore are more likely to be more sustainable simply due to their ability to realize higher revenues from a larger number of users.

- Visitation, Awareness and Demand
 - The existing visitation, demand and awareness of an individual park showS the current interest and willingness to visit said park. Statistics on past visitation, in combination with survey results, were used to indicate the public's awareness of certain parks. Potential demand for each park was determined from survey results, illustrating what people want to do in parks and how that aligns with what each park could offer.
- Capacity for Growth
 - Available space for recreational development was reviewed to determine which parks have the physical capacity for further development. Parks must have available space if they are to utilize investments to create new attractions, which are required to bring in additional visitors and improve sustainability;
 - The current capacity and utilization of recreational space was also analyzed, along with the ability to repurpose existing spaces. A park's capacity for further development helps determine in which parks investments should be made to establish new activities and/or services.
- Infrastructure Condition and Capacity
 - The status of existing infrastructure determines the required level of investment to bring it to modern conditions. Parks with aged infrastructures require higher levels of investment to improve their facilities; this is often required to improve visitation. The potential of existing infrastructure to allow for growth was considered, as repurposing or expanding on existing facilities can allow for increased utilization. Sewage lagoon capacity has been identified as a key barrier to increased visitation in some parks.
- Alignment with Provincial Strategies
 - Priority parks listed in the endowment fund (Whiteshell, Birds Hill, Spruce woods, Paint Lake, and Clearwater Lake) were given additional consideration, as they are of key interest to the Provincial Government's strategy. Parks located in Northern Manitoba were also highlighted as key parks, as they are part of the Northern Economic Development Strategy.

TOP PRIORITY PARKS

Based on the criteria on the previous page, the following six (6) parks were identified as having the highest potential to improve Parks's sustainability and generate significant return on investment. With appropriate investment, these parks have the potential to be destinations: parks that attract visitation both domestically and internationally. They have the potential to increase visitation and improve the overall rate of recovery of the costs associated with operating Manitoba's parks system. They are shown in alphabetical order in Table 14 below.

Table 14: Top Priority Parks Alignment to Criteria

Provincial Park	Region	Quality of Natural / Heritage Features	Tourism Opportunity Areas	Diversity of Activity	Proximity to Population	Visitation, Awareness & Demand	Recreational Capacity for Growth	Infrastructure Condition & Capacity	Alignment with Provincial Strategies
Birds Hill	Central								
Clearwater Lake	Northern								
Grand Beach	Central								
Hecla Grindstone	Central								
Spruce Woods	Western								
Whiteshell	Eastern								

Table 15: Legend



Below, we have proposed a plan to increase all park rates to reflect the current market, along with proposed improvements that would increase the number of campsites at several of the top parks. Minor repairs, upgrades and improved signage has also been budgeted for, while a focus was put on increasing accommodation alternatives and improving park capacity to meet market demands. Preliminary analyses and financial implications are provided for each of the Top 6 parks, as follows.

Birds Hill Provincial Park

Birds Hill Provincial Park is Manitoba Parks's urban-adjacent storefront that offers both Manitobans and international visitors an opportunity to experience a selection of park offerings in an easily accessible and convenient location, only 20 minutes by car from Downtown Winnipeg. The beach in Birds Hill is approximately an hour and a half by bike from The Forks in the centre of Winnipeg, with most of the route on separated bike or multi-use paths. Birds Hill provides Manitoba Parks the chance to showcase their commitment to high quality visitor experiences and promote their unique and extensive offerings. It is popular among Manitobans, as it offers a beautiful network of hiking, biking, equestrian and walking trails in the summer months and cross-country skiing, snowmobiling, and snowshoeing in the winter. It is the site of the Winnipeg Folk Festival and an international birding destination. In addition to its beach, Birds Hill also contains group camping, fall camping, concessions, interpretive programming, historic sites, playgrounds, and picnic areas. As part of the long-term network plan, the 2021 Winnipeg Transit Master Plan calls for a seasonal route to Birds Hill Provincial Park.⁴⁴

The campground at Birds Hill is Parks's most well-utilized accommodation offering, with an average of 31,780 annual unit-nights between 2017 and 2019 and a peak usage of 38,540 unit-nights in 2020. The campground's popularity is directly tied to the park's role as an easily accessible escape from the city that provides an opportunity for Winnipeg residents and visitors to experience nature. Average occupancy between 2017 and 2019 was 72.7% on weekends, 84% on long weekends, and 52.1% overall. Peak demand resulting from pandemic restrictions led to 92.6% occupancy in 2020. The campground offers basic, electric, and full-service sites that are equipped with modern amenities, though some require repairs. The current infrastructure is ageing, with necessary upgrades to the electrical system and several non-modern washrooms. There are also challenges with the site's popularity, as visitors have created rogue trails in the park's busiest areas. Any future development must be careful to minimize the potential impact that could accompany additional visitation.

The Unique Role of Birds Hill Provincial Park

As mentioned above, Birds Hill Provincial Park is unique as a fully operational Provincial Park with a diversity of activities adjacent to Winnipeg, the largest population centre in Manitoba. The park's unique location and scale require an appropriately unique identity and role within the Parks system, especially as it relates to tourism. Optimizing services and amenities to capitalize on this unique position could further establish Birds Hill as the destination for Winnipeg residents and visitors who would not normally frequent Manitoba's Provincial Parks.

Birds Hill has the potential to help Parks introduce and educate new customers. Public survey responses showed that five of the top nine barriers to park visitation were: too far from home; not comfortable camping; don't know much about parks; no transportation; and not really accessible. Developing Birds Hill to offer low-barrier programming that helps introduce people to the wonders of parks will not only help to strengthen local tourism

⁴⁴ <https://winnipegtransit.com/en/major-projects/transit-master-plan/>

within parks, but will also support equitable access to nature. This could include:

- A learn-to-camp program sponsored by a major outdoor brand;
- Low- or no-cost swimming lessons or other outdoor recreation classes.

Through the Winnipeg Folk Festival, Birds Hill Park is many visitors' first experience with a Manitoba Provincial Park. Exploring additional opportunities to host major concerts or festivals at the Folk Festival site is another way to attract tourism to the park and attract outside investment.

Enhancing the Visitor Experience

Birds Hill Provincial Park has the potential to be the gateway to Manitoba's parks. It could introduce Manitobans and tourists alike to the beauty of the outdoors and the joy of immersing one's self in nature within a Manitoba park. Birds Hill can also serve as a test-ground for new services and products as they are rolled out before more expensive rollouts occur farther from Winnipeg. For Birds Hill to take on this role, it will require additional investments and partnerships to offer a variety of activities that appeal to a broad cross-section of individuals. A preliminary list of investments is stated below.

- 1) Develop a visitor centre that would act as a storefront and an equipment-rental business, plus learn-to-camp programming and equipment;
- 2) Seek out opportunities for partnerships with Indigenous neighbours and commercial operators to add programming options such as enhanced winter activities;
- 3) Increase private operator partnerships and activities in the park. An operating model similar to that of The Common at The Forks in Winnipeg could work well in this park due to its proximity to the city;
- 4) Add 50 luxury camping sites (yurt and/or glamping model);
- 5) Upgrade the electrical service to 148 campground sites;
- 6) Repave the Lakewood and Bur Oak trails.

The estimated total capital cost for these improvements is \$5.05 million, excluding any capital costs borne by private commercial operators. Current revenues are based on park revenues from the 2018-19 financial year, plus a portion of online Park Vehicle Pass (PVP) sales allocated to individual parks based on the park's share of offline PVP sales. For example, Birds Hill's PVP sales comprise 32% of total offline park vehicle pass sales from 2016-2020, so Birds Hill receives an allocation of 32% of online pass sales. For this report, the 2018-19 annual online PVP sales of \$1.79 million has been allocated to current park revenues. Table 16 summarizes the change in revenues, expenditures, and recovery rate for the park resulting from the implementation of infrastructure and service changes and increasing PVP pricing and camping fees.

Table 16: Change in Financial Position for Birds Hill Provincial Park

	Current	Future	Change (%)
Revenue (\$)	1,928,821	4,380,417	127.1%
Expenditures (\$)	2,430,981	3,202,797	31.7%
Net Recovery/ (Deficit) (\$)	(502,160)	1,177,620	334.5%
Recovery Rate	79.3%	136.8%	57.4

Clearwater Lake Provincial Park

A true gem of the north, Clearwater Lake Provincial Park has the potential to act as a hub for tourism to adjacent parks and the existing Travel Manitoba Place Brand communities of The Pas and Opaskwayak Cree Nation. It would also benefit from capitalizing on a potential partnership opportunity with its Indigenous neighbours. Its crystal-clear water allows visitors to see the bottom of the 35-foot deep lake, which is also home to trophy-sized trout, northern pike and whitefish, making Clearwater Lake a fisher's dream. The lake is surrounded by a beautiful coniferous forest, which features a 0.8 km hiking trail and "the caves," which were created by a natural phenomenon in which rock masses split away from the shoreline, forming deep crevices that visitors can access via the self-guided trail.

Clearwater Lake offers a variety of summer activities, including fishing, swimming at one of several beaches, boating, hiking, and playgrounds. During the winter months, its hiking trails become cross-country skiing and snowshoeing trails and the lake is used for ice fishing. The park is home to an annual fishing derby, which sees over 200 visitors. The park also receives visitors from across Canada and the United States, as it is part of an informal "Northern Circuit" RV caravan tour route.

The park's accommodations include basic and electrical campsites, yurts and cottages. It also offers campsites that are accessible to visitors with physical disabilities. Park amenities include modern washrooms, pay-per-use showers, trailer sanitary stations, picnic areas, and concessions. Clearwater Lake is a popular day-use park, with many visitors opting not to stay overnight, which contributes to the park's low occupancy rates. Both campgrounds located within the lake (Campers Cove and Pioneer Bay) had occupancy rates of 55% on long weekends during 2019.

The Pas and Opaskwayak Cree Nation are existing anchors that support positioning Clearwater Lake Provincial Park as part of a regional destination and gateway to the north. By marketing the place brand and the provincial park as a cluster of destinations, potential visitors are attracted to more than just what is contained within the park's boundaries.

Enhancing the Visitor Experience

Clearwater Lake has the potential to be a destination park in Northern Manitoba that attracts visitors from around the province, country and world to its pristine lake and unique caves. With Wekusko Falls, Bakers Narrows, Grass Lake, The Pas, Opaskwayak Cree Nation, and Flin Flon all within driving distance, Clearwater Lake has the potential to act as the hub of the North, connecting all of these destinations for potential tourists. To position Clearwater Lake as the next northern tourist destination, significant investment is required, including the following:

- 1) The development of a new electrical campsite on the west side of the lake (50 sites);
- 2) New park signage, including a new feature sign;
- 3) New partnerships with neighbours and commercial operators, such as Indigenous-led tours and winter tours by dogsled.

The estimated total capital cost for these improvements is \$1.88 million, excluding any capital costs borne by private commercial operators.

Table 17 on the following page summarizes the impact of the above-noted infrastructure, service, and pricing changes on the park's financial recovery rate.

Table 17: Change in Financial Position for Clearwater Provincial Park

	Current	Future	Change (%)
Revenue (\$)	626,254	828,993	32.4%
Expenditures (\$)	953,659	1,172,945	23.0%
Net Recovery/ (Deficit) (\$)	(327,405)	(343,952)	(5.1%)
Recovery Rate	65.7%	70.7%	5.0

Grand Beach Provincial Park

The world-class white sand beaches of the east side of Lake Winnipeg, combined with the boreal shield, makes Grand Beach Provincial Park both a summer and winter destination that attracts beachgoers, campers, hikers, wind surfers, cross-country skiers, and snowmobilers. The beach is next to the historic La Verendrye Trail and beautiful grass-topped dunes that reach heights of 8 meters. To the east of the beach is an extensive lagoon that contains various unique species of birds, making Grand Beach an international birding destination. Located within the park are two excellent self-guided walking trails: Spirit Rock and Ancient Beach. The park is popular among a variety of visitors, including Winnipeggers, national and international visitors, cottagers, day-trippers, RVers and new Canadians. European tourists were often seen visiting the park when it received Blue Flag recognition (a designation in Europe given to beaches for their water cleanliness, beach cleanliness, and environmental education), but this status has not been achievable in recent years due to water quality challenges (such as an increase in algae blooms and the presence of zebra mussels). Significant investment beyond what can be provided by Manitoba Parks is required to improve the health of Lake Winnipeg for the future, particularly in light of the increasing effects of climate change.

Park accommodations include 517 cottages and basic and electrical campsites, which reached 56% occupancy on long weekends in 2019 and even higher occupancy levels in 2020 and 2021. Parts of the beach and trail areas of the park are regularly close to capacity on busy summer weekends. Grand Beach Provincial Park contains modern washrooms, pay-per-use showers, concession stands, stores and a laundromat to ensure visitors have access to everything they need to enjoy their time in the park. In addition to enjoying the white sand beaches, visitors can also partake in interpretive programming, rent boats and canoes, go fishing, or enjoy food and refreshments from the concessions at one of the many picnic areas. For those that prefer some shade, the beautiful Grand Beach golf course is just a 15-minute drive from the beach. The beach is also popular among dogs, who frequent their own swimming area there.

Enhancing the Visitor Experience

With international recognition and proximity to a major city (Winnipeg), Grand Beach Provincial Park has the potential to be a destination park in Central Manitoba that draws visitors from around the province, country and globe to its white sand beaches and other features. Approximately 83% of PVPs sold at Grand Beach are daily passes, and the park accounts for approximately 19% of all daily PVPs sold for Manitoba Parks, proving the attractiveness of day-visits to the park. However, significant investment is required to grow the beach as an international tourist destination, including the following:

- 1) Convert 159 basic campsites into electrical sites;
- 2) Upgrades to existing buildings;

- 3) Establish new partnerships with a commercial operator to build a resort hotel and offer additional commercial services.

The estimated total capital cost for these improvements is \$1.25 million, excluding any capital costs borne by private commercial operators. Table 18 summarizes the impact of the above-mentioned infrastructure, service, and pricing changes on the park's financial recovery rate.

Table 18: Change in Financial Position for Grand Beach Provincial Park

	Current	Future	Change (%)
Revenue (\$)	1,182,464	1,633,850	38.2%
Expenditures (\$)	1,880,602	1,984,238	5.5%
Net Recovery/ (Deficit) (\$)	(698,139)	(350,388)	49.8%
Recovery Rate	62.9%	82.3%	19.5

Hecla Grindstone Provincial Park

A resort, an historic Icelandic village, a golf course and the enticing Black Island: Hecla Grindstone Provincial Park has something for everyone. Situated at the narrows between the sandy shallow south basin and the intimidating rocky north basin of Lake Winnipeg, this area has been a crossroads and destination for generations. Indigenous neighbours present opportunities to connect domestic and international tourists with unique, world-class experiences.

Hecla Grindstone Provincial Park comprises a series of beautiful islands between Lake Winnipeg's eastern and western shores. It is the hub of activity in Northern Manitoba, offering both locals and visitors access to a year-round natural playground filled with bird and wildlife watching, beaches, hiking, golf, and much more. Hecla offers a true island experience, where visitors can observe the beauty and power of Lake Winnipeg from gorgeous beaches, motorboats or sailboats. In the summer months, visitors from local communities, Winnipeg, and surrounding areas can participate in fishing, hiking, swimming, boating, and sailing, while staying at the impressive Lakeview Hecla resort. During the winter months, visitors can snowmobile, cross-country ski and Nordic ski the beautiful trails. Visitors that opt not to stay at the resort can rent a charming all-season cabin or one of the park's basic or electric campsites. Group campsites are also available, along with fall and seasonal camping. Camping is a popular option in the park; 84% of campsites are occupied on long weekends. The park offers all the necessary amenities to accommodate any visitor's needs, including modern washrooms, pay-per-use showers, accessible campsites, trailer sanitary stations, a laundromat, and concessions.

Enhancing the Visitor Experience

Offering a resort, historic Icelandic village, golf course, sailing and a network of unique islands, Hecla Grindstone Provincial Park has the potential to be a destination park in central Manitoba. It could act as a haven for sailing, offering overnight and remote excursions to various islands in the area. With investment into infrastructure, accommodations and activities, Hecla Grindstone Provincial Park can be a key boating and tourism destination in Manitoba. To achieve this, the following investment is required:

- 1) Electrical upgrades, including converting 74 basic campsites to electrical, upgrading all current electrical sites to support 50 amp, and adding electrical group-use sites;

- 2) Develop a second sewage lagoon;
- 3) Improve beach amenities, including picnic sites, firepits and access points;
- 4) Improve the existing boat launch and develop a second site;
- 5) Increase parking capacity at the boat launch;
- 6) Establish new partnerships with a commercial operator, such as winter tour activities like dogsledding or snowshoeing; water-based tours; and Indigenous-led tours.

The estimated total capital cost for these improvements is \$3.51 million, excluding any capital costs borne by private commercial operators. Table 19 summarizes the impact of the above infrastructure, service, and pricing changes on the park's financial recovery rate.

Table 19: Change in Financial Position for Hecla Grindstone Provincial Park

	Current	Future	Change (%)
Revenue (\$)	1,040,489	1,382,859	32.9%
Expenditures (\$)	1,294,204	1,466,368	13.3%
Net Recovery/ (Deficit) (\$)	(253,714)	(83,509)	67.1%
Recovery Rate	80.4%	94.3%	13.9

Spruce Woods Provincial Park

With one of the province's most unique landscapes of sand dunes, spruce trees, spring-fed ponds, and mixed-grass prairies, Spruce Woods is a provincial park unlike any other. Geographically close to both Winnipeg and Brandon, Spruce Woods Provincial Park is a beautiful camping and day-use park located in Southwest Manitoba. The park offers a variety of services, including accessible campsites, washrooms, pay showers, trailer sanitary stations, firewood, group campsites, fall camping, and concessions. Activities available throughout the park include backcountry camping, visiting the spirit sands (sand dunes), hiking, biking, cross-country skiing, snowshoeing, fat biking, Skijoring and snowmobiling. The park is used to host events such as cross country running meets and Run for the Cure. Other special events are often hosted by the park's interpretive staff, who offer an interpretation program and amphitheatre shows. The park recently received Dark Sky designation.

Kiche Manitou Campground offers a variety of sites, services, and activities for visitors. The campsite is made up of 118 basic sites, 80 electric sites and 14 yurts. Families that stay at family campsites and comfort campers who rent yurts often use the park's sandy beach, which sits on an oxbow lake. The campgrounds are well attended; in 2019, the grounds reached 83.6% utilization on long weekends and 52.9% on weekends. As in other parks, these numbers have been even higher in 2020 and 2021.

Backcountry visitors have the option to stay at one of five different campsites or rent the Jackfish Lake Cabin, all along the Epinette Creek trail. The park is popular for horseback riders, as it offers an Equestrian campground. Visitors can also book covered wagon rides through Spirit Sands, which are run by a private operator. Spruce Woods caters to the equestrian, canoeist, and kayaker communities, with two campgrounds that offer horse pens, corrals, and barns that allow visitors to camp with their horses and canoes. Overall, the park is in good shape due to recent capital investments in campgrounds, roads, facilities including most washrooms and picnic shelters, lagoon, and water treatment facilities. However, the electrical on site could be upgraded, as it currently does not meet

campers' needs. One of the washrooms in Bay 10 and 11 need replacing and the Spirit Sands interpretive kiosk and picnic shelter could use some updating.

Enhancing the Visitor Experience

Spruce Woods's strong foundation of existing accommodations and activities has positioned it to be a popular attraction within the Manitoba Parks system. The following opportunities for further investment into the park are as follows:

- 1) Develop 140 additional electric campsites and 26 additional yurts;
- 2) Replace washrooms in Bay 10 and Bay 11;
- 3) Upgrade electrical for 21 group campsites;
- 4) Upgrade interpretation kiosk and picnic shelters;
- 5) Partner with commercial operators to offer Indigenous tourism equestrian events, dark sky campsites and accommodations, food services, equipment rentals and a ziplining experience.

The estimated total capital cost for these improvements is \$6.97 million, excluding any capital costs borne by private commercial operators. Table 20 summarizes the impact of the above-noted infrastructure, service, and pricing changes on the park's financial recovery rate.

Table 20: Change in Financial Position for Spruce Woods Provincial Park

	Current	Future	Change (%)
Revenue (\$)	571,276	1,734,238	203.6%
Expenditures (\$)	1,119,352	1,876,896	67.7%
Net Recovery/ (Deficit) (\$)	(548,076)	(142,658)	74.0%
Recovery Rate	51.0%	92.4%	41.4

Whiteshell Provincial Park

Full of cottages, campgrounds, rushing rivers, sandy beaches and deep crystal lakes, Whiteshell Provincial Park has something to offer to cottage owners, campers and tourists alike. The year-round park boasts natural beauty to all who partake in its many outdoor activities. Summer activities include fishing, boating, hiking, biking, golfing, and much more. With over 200 lakes to choose from, recreational fishers from near and far come to test their luck in the pike, bass, walleye, lake, and rainbow trout-filled waters. The Whiteshell is a haven for the outdoor adventurer looking to escape the city and enjoy a true nature-based community. The park contains the only long-haul hiking trail in Manitoba, the Mantario Trail, and walk/hike-in and water-route backcountry camping. The various playgrounds, waysides and beaches are also popular, along with The Great Trail (formerly known as the Trans Canada Trail), which runs through the park. Visitors primarily include Winnipeggers, Ontarians and Albertans, though the number of visitors from across Canada and other parts of the world has grown over the last decade thanks to the reach of social media. The 275,000-hectare park contains several campgrounds, including popular attractions such as Falcon Beach, Falcon Lake, West Hawk Lake and Big Whiteshell. The park is one of the most popular in the province, averaging approximately 80% campground occupancy on long weekends in 2019. A unique feature of the park is its 1,692 cottages, which are on property leased to families and individuals.

Enhancing the Visitor Experience

For the Whiteshell to continue to attract visitors from across Canada and the rest of the world, additional investment is required into the park's accommodations, infrastructure, and experiential offerings. Examples of this investment are as follows:

- 1) Develop one new campground in a new location, comprised of 30 yurts and 60 electric sites;
- 2) The renewal and upgrade of existing infrastructure at all campgrounds, including new washrooms, showers, playgrounds, campground offices, electrical upgrades, water and sewer installations;
- 3) Partner with new commercial operators, such as water-based tours, Indigenous-led tours, forest mindfulness, road cycling, or winter activities such as snowshoeing tours.

The estimated total capital cost for these improvements is \$15.21 million, excluding any capital costs borne by private commercial operators. Table 21 summarizes the impact of the above infrastructure, service, and pricing changes on the park's financial recovery rate.

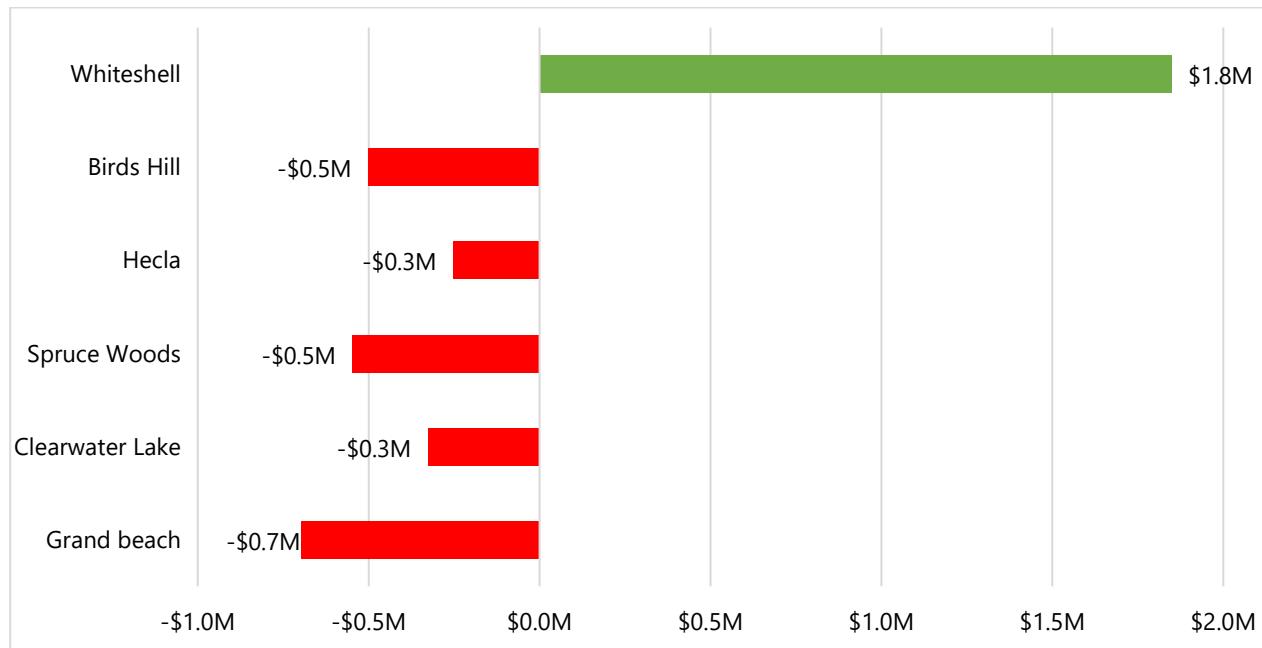
Table 21: Change in Financial Position for Whiteshell Provincial Park

	Current	Future	Change (%)
Revenue (\$)	7,472,108	9,110,492	21.9%
Expenditures (\$)	5,622,674	6,798,751	20.9%
Net Recovery/ (Deficit) (\$)	1,849,435	2,311,741	25.0%
Recovery Rate	132.9%	134.0%	1.1

Future State Recovery Summary

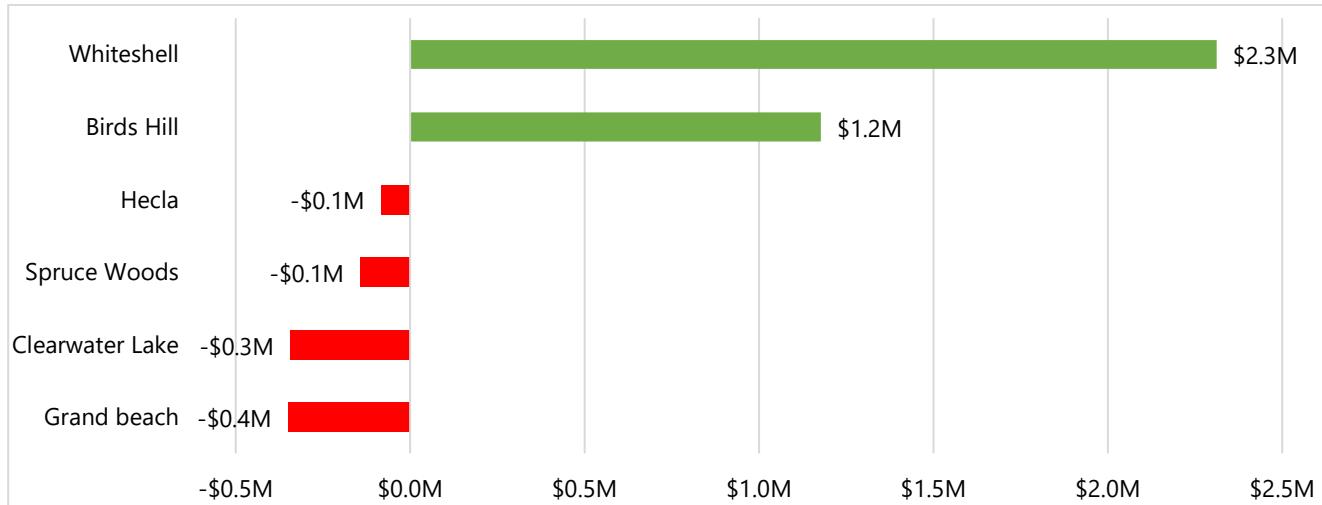
Currently, the top 6 priority parks combine for a net financial operating deficit of \$480,059 per year (96% recovery rate on expenditures), with only the Whiteshell contributing a surplus recovery that partially subsidizes the other parks (Figure 26).

Figure 26 Current State of Annual Operating Surplus/Deficit - Top 6 Parks



Under the proposed future state, the combined net financial operating surplus at the top 6 parks would be \$2.6 million due to both Birds Hill and The Whiteshell operating above 100% recovery (Figure 27). The operating deficits in the other four parks will all be minimal (under \$400,000 per year).

Figure 27: Future State Annual Operating Surplus / (Deficit) – Top 6 Parks



Capital Cost

The total capital cost to implement all recommended improvements to the top 6 priority parks is estimated to be \$33.87 million. The capital cost is included on a depreciated basis in the updated annual expenditures for each park. The total cost is a high-level estimate and is subject to change based on contractor and materials pricing at the initiation of each project. Manitoba Parks may also prioritize some improvements over others or decide not to proceed with certain projects, thereby reducing the capital cost but slowing the rate of improvement and capacity increases in parks and campgrounds.

Campsites

Campsite upgrades and new campgrounds are proposed to add 356-net new campsites to the top 6 priority parks (as shown in Table 22). A total of 349 basic sites will be upgraded to electrical or full service. Comfort camping has proven popular with annual nightly occupancy rates above 80% for existing yurts. By adding 106 new comfort camping options, Manitoba Parks will be pushing to meet this high consumer demand and bringing in new visitors for an experience that has been difficult to obtain under the current supply.

Table 22: Future State of Campsite Inventory - Top 6 Parks

Campgrounds	Current	Future	Change
Basic - Nightly	1,147	798	(349)
Electrical - Nightly	835	1,399	564
Electrical/Water - Nightly	109	109	0
Full Service - Nightly	159	194	35
Comfort / Yurts	53	159	106

Campgrounds	Current	Future	Change
Seasonal - Basic	388	373	(15)
Seasonal - Electric	325	325	0
Seasonal - E/W	35	35	0
Seasonal - Full	128	143	15
Total	3,179	3,535	356

With an increase in camping fees to comparative rates, and assuming no material change in existing occupancy rates, camping revenue at the top 6 priority parks would increase from \$3.3 million annually to \$8.1 million annually. Converting basic seasonal sites to electric ones increases the financial sustainability of seasonal campgrounds while maintaining the total number of available sites. Tourism potential is partially dependent on having lively and exciting places to visit. Ensuring Manitobans have opportunities to lease seasonal sites supports the local economies of Manitoba's Provincial Parks, allowing them to serve as tourist hubs.

Financial Summary of Top 6 Parks

Table 23 provides a financial summary of the estimated future state versus the current state for the top 6 priority parks combined. Enacting the recommended improvements to the top 6 parks could increase their combined net recovery rate from 96% to 116%.

Table 23: Top 6 Parks Combined Financial Summary

	Future State	Current State	Change (\$)	Change (%)	Note
Revenue					
Lease	\$ 3,869,556	\$ 3,869,556	\$ -	0.0%	1
Service Fees	2,340,607	2,340,607	-	0.0%	2
Commercial	856,331	210,002	646,329	307.8%	3
Camping	8,060,619	4,051,359	4,009,261	99.0%	4
Park Vehicle Passes	3,943,735	2,349,888	1,593,847	67.8%	5
	19,070,849	12,821,412	6,249,436	48.7%	
Expenditures					
Park Expenditures	2,877,147	2,060,389	816,758	39.6%	6
Park Staff Salaries	8,827,911	7,972,911	855,000	10.7%	7
Green Team Expenditures	115,257	115,257	-	0.0%	8
Green Team Salaries	240,846	240,846	-	0.0%	8

	Future State	Current State	Change (\$)	Change (%)	Note
Beach Safety Officer	732,000	732,000	-	0.0%	9
Region cost share	665,695	525,271	140,424	26.7%	10
Park District Service Fees	1,113,197	1,113,197	-	0.0%	11
911 - Fire Protection Agreement	171,400	171,400	-	0.0%	12
Enforcement	403,741	370,200	33,541	9.1%	13
Depreciation on new capital	1,354,800	-	1,354,800	0.0%	14
	16,501,994	13,301,471	3,200,523	24.1%	
Net Surplus / (Deficit)	2,568,854	(480,059)	3,048,913	635.1%	
Recovery Rate	116%	96%			

Notes:

1. Lease revenues represent lease payments made by cottage owners. The future state assumes no change to the existing leasing system.
2. Service fees represent service fee revenues paid by cottage owners for park district services. The future state assumes no change to the existing park district service fee system.
3. Commercial revenues in the current state represent lease payments made by commercial operators in the park district. The future state recognizes an increase in commercial revenues due to an increase in the number of commercial operators and new revenue sharing agreements between operators and the department.
4. Camping revenues are assumed to increase due to new camping experience offerings and the increase to camping pricing as described in the Financial Sustainability section.
5. Revenues from PVPs are assumed to increase due to the increase in PVP pricing, as described in the Financial Sustainability section.
6. Park expenditures consist of non-salary costs for the operations and maintenance of parks. The increase in park expenditures primarily relates to the estimated additional operating costs associated with new campsites, such as yurt cleaning, repairs and maintenance, and utilities.
7. Park staff salaries are estimated to increase due to an additional 12 full-time equivalent staff required to operate and maintain the new campgrounds and comfort sites, and to staff the visitor centre at Birds Hill.
8. Expenditures and salaries related to the Green Team are not estimated to increase. However, there may be an opportunity to convert some of the 12 new full-time staff to Green Team positions depending on expected role responsibilities and capacities.
9. Beach safety officer expenses are assumed to remain flat, as no additional beach capacity is being added.

10. Region cost share accounts for regional management costs and has been increased proportionally to the added park expenditures and salaries. There may be opportunities to reduce the future state through further economies of scale, such as a higher employee-to-manager ratios.
11. Park district service fees are contracted costs related to delivering services to cottagers (such as roads, sewer, water, garbage, etc.) and are assumed to remain flat, as no additional services are being offered to these users.
12. The 911 – Fire protection agreement is assumed to remain the same in the future state.
13. Enforcement costs have been increased in the future state proportionally to the number of new campsites added at Spruce Woods and Birds Hill.
14. Depreciation costs have been added on a straight-line basis, with an average assumed useful life of 25 years for the \$33.87 million in capital cost improvements.

Return on Investment

The potential return on investment ("ROI") for a \$33.87 million investment in the top 6 priority parks is calculated as follows:

$$ROI = (Net Present Value of Net Financial Change Over 25 Years - Capital Investment) / Capital Investment$$

The following assumptions have been used in this calculation:

- The potential return is based on the annual net cash flow from the parks, calculated as net financial change from the current state to the future state of \$3.05 million per year plus annual depreciation expense of \$1.35 million for a net cash flow improvement of \$4.4 million annually;
- The net financial change is assumed to take full effect in year 2 and last for 25 years;
- The present value of the capital cost is \$33.87 million;
- The government bond rate varies from a low of 2% to a high of 5%.

Based on the above assumptions, the ROI ranges from a low of 66% to a high of 144% over 25 years, or an annualized range of 2.6% to 5.8%.

Financial Analysis Limitations

There are several limitations to the financial estimations and assumptions used in this section:

- The future state represents a period in the future when the department has been able to enact all recommendations from this report. Variable implementation times between recommendations will affect the timing of future financial benefits. For example, a price increase to camping fees and PVPs will likely need to be undertaken over an extended period of 5 to 10 years to avoid public criticism;
- Significant assumptions have been made regarding the capital investments made in the top 6 parks. Actual capital costs for certain projects may vary from estimates, or certain capital investments may not be undertaken;
- No inflationary impacts have been considered in future state estimates due to the variable implementation time for capital investments and price increases;
- The calculations do not include other economic benefits to the province and surrounding areas or the added benefits of profits to other business operators within the parks.

SECONDARY PRIORITY PARKS

Using the same criteria as shown above in Table 14, nine (9) additional parks were ranked to round out the top 15 parks with the highest potential to improve Manitoba Parks's sustainability and generate return on investment and economic benefit for the Province. With the appropriate amount of investment, these nine (9) parks have the potential to attract visitation both domestically and internationally, generate tax revenues for the province and improve the overall recovery of Manitoba's tourism economy. They are listed on the following pages in alphabetical order.

Table 24: Secondary Priority Parks Alignment with Criteria

Provincial Park	Region	Quality of Natural / Heritage Features	Tourism Opportunity Areas	Diversity of Activity	Proximity to Population	Visitation, Awareness & Demand	Recreational Capacity for Growth	Infrastructure Condition & Capacity	Alignment with Provincial Strategies
Asessippi	Western								
Duck Mountain	Western								
Little Limestone	Northern								
Nopiming	Eastern								
Paint Lake & Pisew Falls	Northern								
Pembina Valley	Central								
Pinawa Dam	Eastern								

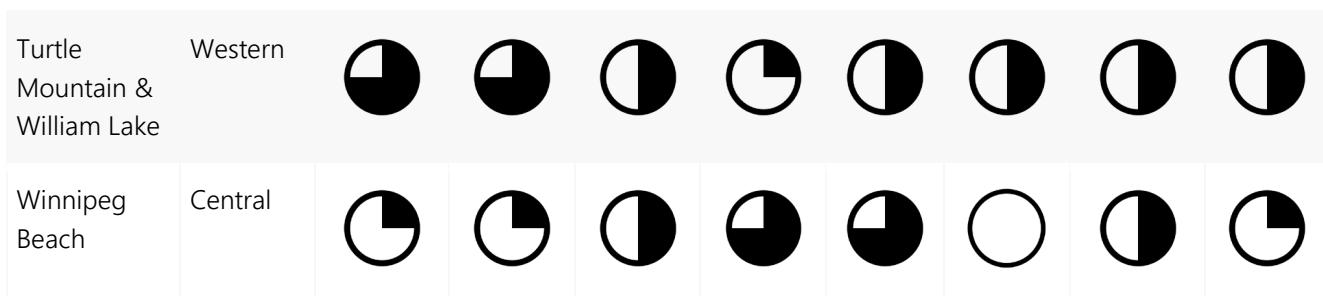


Table 24: Legend



Asessippi Provincial Park

Asessippi Provincial Park is located at the south end of Lake of the Prairies, a man-made lake bordered by the Assiniboine and Shell rivers. The Lake is a popular summer destination, offering beautiful beaches, boating, hiking, self-guided trails, mountain biking and picnic areas. The lake is known for its walleye, and many fishers travel to Asessippi for a chance to reel them in. Amenities at Asessippi include camping, yurts, washrooms, and a snack bar.⁴⁵ The Park is popular in the winter, as it contains a ski resort that offers 26 downhill ski/snowboard runs, 3 chair lifts, 2 terrain parks and a downhill snow tube park. Other popular winter activities in the park include snowshoeing and cross-country skiing.⁴⁶

Investment in Activities, Amenities, and Partnerships to Consider:

- Support existing operator to build world-class mountain biking park;
- Additional yurts;
- Modernize the existing campground;
- Redevelop large group sites, which are currently too big;
- Allow for backcountry camping;
- Expand trail systems;
- Add zipline and aerial adventure activities;
- Explore snowmobile trails in areas where this would fit with the park management plan.

Duck Mountain Provincial Park

Duck Mountain is a part of the Manitoba Escarpment, a series of highland topographies in western Manitoba. Its crystal-clear water, including that of East Blue Lake, allows visitors to see 40 feet down and glimpse the many trout, splake, rainbow trout, walleye, northern pike and perch inhabiting the water. The lake is accompanied by thickly wooded rolling terrain, which contains Baldy Mountain, Manitoba's highest point at 831 m. Hiking trails can also be found in the forest; Copernicus Hill, for example, contains an observation tower at the end of its 1.5 km trail. Duck Mountain offers a variety of summer activities, including fishing, swimming, boating, canoeing, hiking, scuba diving and biking. Nature viewing is popular, as the boreal and deciduous forests and upland meadows are home to a

⁴⁵ <https://www.travelmanitoba.com/directory/asessippi-provincial-park/>

⁴⁶ <https://www.travelmanitoba.com/directory/asessippi-ski-area-and-resort/>

variety of beautiful wildlife, attracting hunters and trappers. ATVing is popular, as the park features a trail.

During the winter months, SnoMan, a snowmobile interest group, grooms the snowmobile trials. The park offers cross-country ski trails, including a 12 km trail called The Childs. Ice fishing is popular among visitors as well. The park's accommodations include basic and electrical campsites, yurts and cottages. Park amenities include modern washrooms, pay-per-use showers, trailer sanitary stations, picnic areas, and concessions.⁴⁷

Investment in Activities, Amenities, and Partnerships to Consider:

- Safari/wildlife tours; this park could be branded as "Manitoba's Wildlife Adventure Destination";
- Expanded fishing and hunting activities;
- Additional long journey hiking and backcountry camping opportunities;
- Dark sky viewing;
- Mountain biking tours;
- Expanding and modernizing the existing campground;
- Additional yurts.

Little Limestone Provincial Park

Little Limestone Provincial Park is located in the northwest tip of Lake Winnipeg, approximately 450 kms north of Winnipeg.⁴⁸ It contains the largest colour-changing lake in the world, according to the Canadian Parks and Wilderness Society, Little Limestone Lake.⁴⁹ The lake changes colour as the water temperature changes due to the amount of calcite, making this a unique and awe-inspiring lake to visit. It is also a beloved destination for canoeing, kayaking, motorboating, and fishing (varieties of fish within the lake include perch, pike, walleye and whitefish). Wildlife viewing and hunting are popular for the diverse range of wildlife that inhabits the area, including songbirds, duck, fox, moose and woodland caribou. The park is a stop on the informal "Northern Circuit" of Manitoba. There is no accommodation within Little Limestone Provincial Park, making it a day-use only park.⁵⁰ Indeed, the lake area makes up the entire Provincial Park; all of the land adjacent to the road is Mosakahiken Cree Nation reserve land (Moose Lake 31).

Investment in Activities, Amenities, and Partnerships to consider:

- Explore mutually beneficial opportunities with the adjacent First Nation through a process that empowers the Nation and its membership to take a leading role in future updates to the park's management plan;
- Highway signage.

Nopiming Provincial Park

Nopiming Provincial Park is a beautiful piece of wilderness made up of miles of shield rock, 700 lakes, towering

⁴⁷ <https://www.travelmanitoba.com/directory/duck-mountain-provincial-park/>

⁴⁸ <https://cpawsmb.org/campaigns/little-limestone-lake/>

⁴⁹ <https://cpawsmb.org/campaigns/little-limestone-lake/>

⁵⁰ <https://www.todocanada.ca/little-limestone-lake-manitoba/>

granite outcrops and stands of birch, black spruce and poplar trees.⁵¹ The park is populated with fishing lodges and out-camps, some of which are fly-in only. Anglers travel to the park to stay at these lodges to fish densely populated waterways. The park is home to the rare woodland caribou, moose, bears, and bald eagles. There are four campgrounds and three lodges in which to stay within the park. Popular activities include camping, fishing, hiking, and canoeing, as the park contains some of the best canoe routes in Manitoba.⁵²

Investment in Activities, Amenities, and Partnerships to consider:

- Modernize park facilities where appropriate, including washrooms and showers with running water;
- Expand existing service offerings by providing more concessions and services within the park;
- Expand the Bird Lake Campground parking lot and look for other opportunities to increase parking capacity, particularly for day users in general in the area;
- Add picnic areas for day visitors;
- Manage backcountry access and expand managed canoe routes to allow greater utilization of natural assets and facilitate commercial tour-operator use of the park to attract tourism;
- Increase park advertising;
- Upgrade road infrastructure with more paved access, given significant distances on gravel roads to some existing campgrounds and backcountry access.

Paint Lake & Pisew Falls

Paint Lake Provincial Park and Pisew Falls Provincial Park are 50kms apart, south of Thompson along Highway 6. The proximity of these two parks and their complementary offerings necessitated clustering them as a secondary priority.

Paint Lake is 56,000-acre park entirely designated for recreational development and is home to the only beach in the area, ski trails, and excellent backcountry camping (canoe and kayak). It is known as a local destination for fishing, and has 278 cottage lots, 77 campsites, and 6 yurts. Paint Lake Lodge offers 8 cabins and a large dining room overlooking the lake, as well as a full-service store, boat and canoe rentals, and guide services for exploring the lake. It is the terminus of the Grass River chain, which provides opportunities related to backcountry canoeing.

Pisew Falls is a magnificent natural attraction where the Grass River drops and bends through a gorge in Precambrian rock. There is a bridge over the river and a boardwalk to an observation platform. For the more adventurous, there is a 22km loop trail that takes visitors to Kwasitchewan Falls, Manitoba's highest waterfall.

These parks were identified as priorities in the Provincial Parks Endowment Fund.

Investment in Activities, Amenities, and Partnerships to consider:

- Multi-day hiking route that allows visitors to camp along the Grass River and potentially overlooking Kwasitchewan Falls;
- Expand infrastructure and services to support Northern lights viewing;
- Engage with neighbouring First Nations to explore mutually beneficial opportunities that align with parks systems objectives and First

⁵¹ <https://www.travelmanitoba.com/directory/nopiming-provincial-park/>

⁵² <https://www.gov.mb.ca/sd/parks/park-maps-and-locations/eastern/nopiming.html>

canoe and kayak outfitters and backcountry tripping;

- Nation's economic development goals;
- Upgrade and repair campground washrooms.

Pembina Valley Provincial Park

The large 440-acre park contains a vast deciduous forest, which provides a multitude of hikes that offer views of the beautiful Pembina valley spillway⁵³. The park is popular for its hiking trails and beautiful scenery which, is especially lovely in the fall when the leaves change colour. Visitors travel from all around to watch the migration of the birds, especially raptors. The park is visited mainly by southern Manitobans, Winnipeggers, and Americans.

Investment in Activities, Amenities, and Partnerships to consider:

- There is potential to work with an interested private operator to sell hiking poles, park passes, water bottles and offer equipment rentals (mountain bikes);
- Modernize the washrooms;
- Improve road/highway signage for park access;
- Develop multi-use and mountain bike trails;
- Increase park advertising;
- Add backcountry campsites;
- Guided birdwatching;
- Zipline and aerial adventures.

Pinawa Dam Provincial Park

The old Pinawa Dam is a popular tourist attraction that offers beautiful hiking trails for day visitors from all over Manitoba. The 193-hectare park is located on the Pinawa Channel and Winnipeg River system, on the edge of the Canadian Shield. The Park contains a decommissioned generating station that was Manitoba's first year-round hydroelectric plant, which is a popular attraction. A volunteer organization, "The Friends of Old Pinawa," has helped to improve the park and draw tourists to the area.⁵⁴ Popular activities within the park include tubing down the rapids and bird watching, as the park is an International Birding Trail destination. Pinawa Dam is a day-use park and does not offer any accommodations.

Investment in Activities, Amenities, and Partnerships to consider:

- Investment in upkeep and maintenance;
- An interpretative centre and additional programming including information on the history of the town of Pinawa and the Dam (could act as a venue to rent for weddings and functions);
- Guided birdwatching;
- Establish partnerships with Granite Hills and Black Bear golf courses.

Turtle Mountain & William Lake Provincial Parks

⁵³ <https://www.travelmanitoba.com/directory/pembina-valley-provincial-park/>

⁵⁴ <https://www.travelmanitoba.com/directory/pinawa-dam-provincial-park/>

Turtle Mountain & William Lake Provincial Parks can be found in southwestern Manitoba, approximately an hour south of Brandon. Turtle Mountain visitors can enjoy a variety of activities, including biking trails, canoe routes, horse riding trails, self-guided hiking, and fitness trails. Visitors can opt to stay the night at one of the park's two campgrounds. In the winter months, the park offers a variety of unique recreational activities, including a hockey rink, skating pond, toboggan hill, and cross-country ski trails, each equipped with its own warming shelter. William Lake is located approximately 20-minutes east of Turtle Mountain and is a popular fishing, swimming, kayaking and canoeing destination. Visitors often hike the Turtle Back trail to Turtle Back summit and fish the rainbow trout-filled waters. William Lake is a popular day-use site; however, locals sometimes choose to stay in a small trailer or tent at one of the basic campsites. These parks are both in close proximity to the International Peace Gardens, a significant tourism attraction itself.

Investment in Activities, Amenities, and Partnerships to consider:

- Modernize the existing showers and washrooms in Turtle Mountain campgrounds;
- Build a new water treatment plant;
- Build a year-round interpretive centre in Turtle Mountain; offer interpretive programming in both parks;
- Add guided long-journey hiking experiences;
- Expand William Lake Provincial Park to include the existing trails;
- Expand the number and size of campsites at William Lake to accommodate larger trailers;
- Offer campsites with electrical and water and increase the number of sites overall;
- Improve accessibility at William Lake;
- Develop yurts in both park campgrounds;
- Add recreation sites, including a frisbee golf course, soccer pitch and volleyball courts;
- Offer concessions at both parks;
- Work with partners to fund new developments;
- Partner with local Indigenous groups to offer programming, tours, and Indigenous experiences.

Winnipeg Beach Provincial Park

Located on the west side of Lake Winnipeg, 20 minutes south of the community of Gimli, is Winnipeg Beach Provincial Park. Popular among families, campers, millennials, cabin-owners and day-users alike, the beach offers a relaxing getaway for all Manitobans. The brand-new campground is a popular accommodation, having reached 96% occupancy on long weekends in 2019. The park offers a variety of activities, including boating, fishing, playgrounds, picnic areas, and cycling trials. Easily accessible from Winnipeg and well-utilized, the existing campground was recently upgraded to include more serviced sites suitable for modern RVs. Adjacent to the town and cottage community of Winnipeg Beach and accompanying restaurants and amenities, the Provincial Park provides campsites, day-use areas, and public access to Lake Winnipeg beaches.

Investment in Activities, Amenities, and Partnerships to Consider:

- Modernize the existing washrooms;
- Add additional picnic shelters along the beach;
- Add resort-style cabanas to rent on the beach;
- Offer beachside concessions and equipment rentals (boogie boards, water wings etc.).

Future State Recovery Summary – Top 15 Priority Parks

Table 25 provides the financial summary for the top 15 parks, assuming all recommended investments in the secondary priority parks are completed in addition to the \$33.8 million capital investment in the top six priority

parks. The physical assessment estimates the total required capital investment for the top 15 parks at \$50.74 million.

The current state recovery rate for the top 15 priority parks is 86%, a noticeable drop from the top 6 park recovery rate of 96%. The recommended improvements would increase the recovery rate to 101% under the future state estimate, resulting in a small annual breakeven surplus of \$161,587.

Table 25: Top 15 Parks Combined Financial Summary

	Future	Current	Change (\$)	Change (%)
Revenue				
Lease	\$ 4,422,007	\$ 4,422,007	\$ -	0.0%
Service Fees	2,626,688	2,626,688	-	0.0%
Commercial	923,788	254,973	668,815	262.3%
Camping	10,007,290	5,608,696	4,398,595	78.4%
Park Vehicle Passes	4,547,360	2,694,817	1,852,543	68.7%
	22,527,133	15,607,181	6,919,953	44.3%
Expenditures				
Park Expenditures	3,904,849	2,994,664	910,185	30.4%
Park Staff Salaries	11,604,233	10,617,027	987,206	9.3%
Green Team Expenditures	179,686	179,686	-	0.0%
Green Team Salaries	386,120	386,120	-	0.0%
Beach Safety Officer	982,000	982,000	-	0.0%
Region cost share	967,561	799,695	167,866	21.0%
Park District Service Fees	1,411,021	1,411,021	-	0.0%
911 - Fire Protection Agreement	241,800	241,800	-	0.0%
Enforcement	658,676	625,135	33,541	5.4%
Depreciation on new capital	2,029,600	-	2,029,600	0.0%
	22,365,546	18,237,147	4,128,399	22.6%
Net Surplus / (Deficit)	161,587	(2,629,967)	2,791,554	106.1%
Recovery Rate	101%	86%		

Return on Investment

The potential return on investment ("ROI") for a \$50.74 million investment in the top 15 priority parks is calculated using the following assumptions:

- The potential return is based on the annual net cash flow from the parks, calculated as net financial change from the current state to the future state of \$2.77 million per year plus annual depreciation expense of \$2.03 million for a net cash flow improvement of \$4.80 million annually;
- The net financial change is assumed to take full effect in year 2 and lasts for 25 years;
- The present value of the capital cost is \$50.74 million;
- The government bond rate varies from a low of 2% to a high of 5%.

Based on the above assumptions, the ROI ranges from a low of 21% to a high of 78% over 25 years, or an annualized range of 0.9% to 3.1%. The reduced ROI results compared to the potential ROI from investment in the top 6 priority parks shows that every dollar invested in the top 6 priority parks will yield a greater return than dollars invested in the secondary priority parks.

ADDITIONAL POTENTIAL ACTIVITIES, ACCOMMODATIONS, & TOURS

Survey respondents identified a series of additional innovative ideas for activities, accommodations and tours that might encourage them to visit Manitoba Parks more frequently or for the first time. Table 26 below summarizes potential locations for the most common, impactful, and implementable of the items identified in the survey that may not have necessarily been captured in the more specific park plans. This list complements the detailed information provided above and does not attempt to summarize all potential activities, accommodations, and tours.

Table 26: Summary of Potential Activities, Accommodations & Tours

Park	Activity	Accommodation	Tour
Birds Hill	<ul style="list-style-type: none"> - Kiteboarding or snow-kiting - Yoga and fitness programs 	<ul style="list-style-type: none"> - Parks-managed yurts - Interpretive Centre / Reception Centre / venue for weddings & functions 	<ul style="list-style-type: none"> - Indigenous-led tours - Winter tours by dogsled - Cycling tours: road cycling - Guided birdwatching - Forest mindfulness / meditation / yoga - Guided snowshoeing & winter activity
Clearwater Lake		<ul style="list-style-type: none"> - Parks-managed yurts - Privately-operated luxury camping / eco-camping - Hotel / resort - Interpretive Centre / Reception Centre / venue for weddings & functions 	<ul style="list-style-type: none"> - Indigenous-led tours - Winter tours by dogsled - Dark sky viewing
Grand Beach	<ul style="list-style-type: none"> - Mountain biking - Kiteboarding or snow-kiting - Floating waterpark 	<ul style="list-style-type: none"> - Parks-managed yurts - Hotel / resort - Interpretive Centre / Reception Centre / venue for weddings & functions 	<ul style="list-style-type: none"> - Guided snowshoeing & winter activity
Hecla Grindstone		<ul style="list-style-type: none"> - Privately-operated luxury camping / eco-camping 	<ul style="list-style-type: none"> - Indigenous-led tours - Guided snowshoeing & winter activity - Cycling tours: road cycling
Spruce Woods	<ul style="list-style-type: none"> - Long journey walking / hiking 	<ul style="list-style-type: none"> - Parks-managed yurts - Privately-operated luxury camping / eco-camping 	<ul style="list-style-type: none"> - Indigenous-led tours - Dark sky viewing - Guided snowshoeing & winter activity
Whiteshell	<ul style="list-style-type: none"> - Floating waterpark 	<ul style="list-style-type: none"> - Interpretive Centre / Reception Centre / venue to rent for 	<ul style="list-style-type: none"> - Indigenous-led tours

Park	Activity	Accommodation	Tour
weddings, functions			

Overall Financial Impact – All Parks

This section outlines the potential financial impact on all 76 operational parks from further investment in Manitoba's parks. As detailed analysis was only completed for the top 15 priority parks, the financial estimates for the other parks are projected based on summary extrapolations, assuming all investments identified in the physical assessment process are undertaken.

CAPITAL COST

The physical assessment process identified the estimated capital costs of implementing new infrastructure and executing existing asset improvements. A total of \$97.7 million in potential capital investments were identified across all 76 operational parks, with the figure being reduced to \$83.6 million for some capital investments in the top 6 priority parks being deemed low priority. This \$83.6 million includes the \$33.9 million already identified for the top 6 priority parks, and the \$50.4 million identified for the top 15 priority parks. Of the \$83.6 million in capital investments, \$56.1 million relates to existing asset improvements, and \$27.5 million relates to new infrastructure projects.

Aside from the capital costs identified for the top 6 priority parks, no further prioritization has been applied to the remaining \$49.7 million in additional capital costs identified for the other 70 operational parks. Further strategic planning and investment prioritization by the department may reduce the estimated capital cost by cancelling or postponing low priority projects.

FINANCIAL SUMMARY OF ALL PARKS

The estimated financial impact across all parks is listed in Table 27. The financial categories are the same as listed in the financial summary for the top 6 parks (Table 23). Improvement measures across all parks are estimated to increase the recovery rate for parks operations from 82% to 94% annually and bring the current state annual net deficit closer to a breakeven result. This result represents revenue and expenditures for parks operations only and excludes department level administration.

The current recovery rate for the Parks and Resource Protection division as a whole is approximately 58%. This recovery rate is estimated to increase to 69% under the future state, assuming divisional administrative expenditures scale at a rate of 1/5 to the increase in parks operations expenditures.

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 to be nominal.

Table 27: All Parks Combined Financial Summary

	Future State	Current State	Change (\$)	Change (%)	Note
Revenue					
Lease	\$ 4,687,460	\$ 4,687,460	\$ -	0.0%	
Service Fees	2,757,353	2,757,353	-	0.0%	
Commercial	941,023	271,418	669,605	246.7%	1
Camping	11,961,004	7,384,799	4,576,205	62.0%	2
Park Vehicle Passes	6,001,278	3,524,668	2,476,610	70.3%	3
	26,348,119	18,625,698	7,722,420	41.5%	
Expenditures					
Park Expenditures	4,960,598	3,937,283	1,023,315	26.0%	4
Park Staff Salaries	14,412,423	13,425,217	987,206	7.4%	5
Green Team Expenditures	285,664	285,664	-	0.0%	
Green Team Salaries	611,316	611,316	-	0.0%	
Beach Safety Officer	982,000	982,000	-	0.0%	
Region Cost Share	1,147,750	972,069	175,681	18.1%	6
Park District Service Fees	1,497,974	1,497,974	-	0.0%	
911 - Fire Protection Agreement	246,050	246,050	-	0.0%	
Enforcement	658,676	625,135	33,541	5.4%	7
Depreciation on New Capital	3,342,140	-	3,342,140	0.0%	8
	28,144,590	22,582,707	5,561,883	24.6%	
Net Deficit – Park Operations	(1,796,471)	(3,957,009)	2,160,538	-54.6%	
Recovery Rate – Park Operations	94%	82%			
Parks and Resource Protection					
Divisional Expenditures	10,141,385	9,665,293	476,092	4.9%	9
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%			

Notes:

1. Commercial revenues are estimated to increase proportionally to park capacity expansions, measured through the increase in campsites. The top 6 parks will expand their share of total campsites from 52% of all parks' campsites in the current state to 55% in the future state, a 3 percentage point increase. The top 6 parks generate 88% of commercial revenue under the current state; thus, adding 3 percentage points will increase their share to 91% of commercial revenues. Dividing the future state result of commercial revenues from Table 23 by a 91% share returns the future state commercial revenues for all parks.
2. The increase in camping revenues in the future state is measured using the same methodology as commercial revenues in note 1. The top 15 parks currently generate 76% of total camping revenue. The total result for all parks assumes that the top 15 parks will increase their share of camping revenue to 84% based on new investment in the priority parks.
3. PVP sales in both the current state and future state include an allocation of online PVP sales to parks proportionally to their offline (direct) PVP sales. The current state and the future state include \$1.79 million and \$3.02 million in net online sales, respectively. The total increase is estimated based on the recommended price increases per Table 14 being fully implemented.
4. The increase in park expenditures in the future state is measured using the same methodology as commercial revenues in note 1. The top 6 parks currently generate 52% of total park expenditures. It is assumed that the change in expenditures will heavily favour the top 6 parks, bringing their share to 58% of total park expenditures.
5. The increase in park salaries is limited to the estimated increase in salaries for the top 15 parks. No additional FTEs are assumed to be added outside of the top 15 parks.
6. The increase in region cost share in the future state is measured using the same methodology as park expenditures in note 5. The top 6 parks are expected to comprise 58% of the region cost share in the future state.
7. The increase in enforcement costs is limited to the estimated increase in enforcement for the top 6 parks per Table 23. No additional enforcement is assumed to be added outside of the top 6 parks.
8. Depreciation costs have been added on a straight-line basis, with an average assumed useful life of 25 years for the \$83.6 million in capital cost improvements.
9. Parks and Resource Protection divisional expenditures in the current state have been calculated based on the total division expenditures in the 2021 Conservation & Climate annual report (\$52.2 million), less the creation of the Provincial Parks Endowment Fund (\$20 million), less total calculated park operations expenditures (\$22.6 million). Future state revenues assume divisional administration can scale its expenditures at a rate of 1/5 of new spending on parks operations.

RETURN ON INVESTMENT

The updated assumptions for calculating the ROI for the Parks and Resource Protection Division as a whole include:

- The potential return is based on the net cash flow change from the current state to the future state of \$1.68 million per year plus the depreciation expense of \$3.34 million for total annual cash flow improvement of \$5.03 million.
- The net financial change is assumed to take full effect in year 2 and last for 25 years;
- The present value of the capital cost is \$83.6 million;

- The government bond rate varies from a low of 2% to a high of 5%.

Based on the above assumptions, the ROI ranges from a low of -23% to a high of 13% over 25 years, or an annualized range of -0.9% to 0.5%.

A potentially negative ROI in this case reflects that not all suggested capital investments will generate a positive financial contribution to park operations. Approximately 67% of suggested capital improvements relate to upgrading existing park infrastructure. These investments are necessary for the proper upkeep and maintenance of parks, but in most cases, they do not increase park capacity or the number of attractions. The difference in ROI between the investment in the top 6 parks versus the investment in all parks shows that greater financial value could be generated by investing in the most popular parks. However, this is purely a financial metric and does not account for the value of investing in provincial parks as a public good. This analysis also does not take into consideration overall economic benefits to the province through increased private business operations within or near parks that may result from increased investment and focus on improving the visitor experience.

FINANCIAL ANALYSIS LIMITATIONS

The same limitations as described in the financial summary of the top 6 parks apply to the financial summary of all parks, but to a greater order of magnitude. A government investment of \$83.6 million in provincial parks would require a significant planning and consultation phase to analyze the benefits and costs of each suggested capital project. This level of investment would take multiple years to be fully implemented and would be affected by multiple cost variables, which are outside the scope of this analysis.

Benefits of Parks System Modernization

The modernization of the Manitoba's parks system requires the physical improvement of infrastructure such as trails, roads, campgrounds, and a wide variety of buildings, as well as improvements to the organizational systems that support the breadth of activities within parks. Some aspects will be easily seen and appreciated by all visitors (such as upgraded washrooms or improved wayfinding), whereas other elements will be harder to see, like how commercial licenses are managed or how investment decisions are made.

A key benefit to the opportunities identified through this study is that they are expected to result in balanced outcomes in terms of financial sustainability, equitable access to nature, and the conservation of natural assets.

- Increasing visitor capacity will allow Manitoba's Provincial Parks to accommodate a greater diversity of activities that meet the expectations of a wider audience, therefore playing a role in both driving tourism and improving the quality of life of Manitobans;
- System improvements are required to attract new visitors, better deliver what visitors expect, and ensure today's activities improve rather than degrade parks for future users;
- The financial sustainability of the parks system will allow for improved capital asset management, including regular infrastructure renewal, capital improvements, and the development of new facilities where appropriate.

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; therefore, by focusing investment to meet larger domestic market demands, Parks is positioning their assets as marketable for all markets – including international ones.

A key gap in the current offerings related to tourism potential is the shortage of accommodation options, particularly higher-value "comfort camping" facilities and serviced campsites. The modernization of existing campgrounds to include more serviced campsites and yurts not only increases the peak-season capacity but also increases parks' abilities to attract visitors into the shoulder seasons. An increased availability of high-quality accommodations and unique experiences further allows Manitoba's Provincial Parks to act as hubs for tourism operators and drivers beyond the perimeter highway.

Economic Benefits

The summers of 2020 and 2021 introduced, or reintroduced, many of the province's residents to Manitoba's Provincial Parks. Improving visitor experiences and providing more opportunities for Manitobans to spend disposable income closer to home will capture some expenditures that have historically leaked to neighbouring jurisdictions. Moreover, capturing additional spending from the existing international visitors while attracting new visitors will be beneficial to the provincial economy.

Canadian Parks Council released a study showing the economic impact of Canada's National, Provincial and Territorial Parks.⁵⁵ Combined direct spending from all park agencies across Canada contributed \$4.6 billion to

⁵⁵ Canadian Parks Council, 2010, The Economic Impact of Canada's National, Provincial, and Territorial Parks in 2009

Canada's Gross Domestic Product (GDP), which included \$2.9 billion in labour income, or approximately 64,000 full-time jobs, in 2009. For every dollar spent by park (government) agencies, six (6) dollars were spent by visitors through travel, accommodations, food and beverage purchases, and other expenses.

The economic benefits of British Columbia's Provincial Parks, as outlined in a 2001 report, indicate that expenditures by the government into parks and protected areas resulted in a ten-fold increase in visitor spending (90% of total expenditures came from visitors).⁵⁶ Additionally, \$148 million (approximately one-third of all visitor expenditures) were made by out-of-province residents. This study estimated that BC Parks contributed \$521 million to the provincial GDP and \$219 million in tax revenues for the federal and provincial governments. An important finding from this report was that economic benefits were widely distributed across the province, with more than half occurring outside the Lower Mainland and Victoria regions.

A separate study would need to be conducted to fully understand Manitoba Parks's current and potential impacts on Manitoba's GDP, but the studies mentioned above indicate that parks agencies have significant positive economic impacts beyond the revenue generated by the agencies themselves.

Benefits for Manitoba Residents

Improving the quality of parks and their offerings improves the quality of life for Manitobans by providing greater opportunities to explore and enjoy the province's cultural and environmental bounties. Increased visitation will drive additional economic activity further away from Winnipeg, adding new jobs and entrepreneurial opportunities into the rural fabric.

Greater financial sustainability of Parks allows tax dollars to be better utilized to improve our parks rather than simply subsidizing a declining status quo. Maintaining equitable access to nature will be achieved by retaining a certain portion of lower-cost basic sites throughout the system and attracting outside investment to support cost-recovery sponsorship of targeted programming, such as learn-to-camp initiatives.

Strengthening the Capacity for Conservation

The modernization of parks and improved financial sustainability reduces pressure for revenue-generating activities in conservation areas and encourages reinvestment into the public good. Through increased visitation and a greater emphasis on service delivery, the modernized Manitoba Parks will have a significant opportunity to educate tourists and residents about conservation efforts and showcase the intrinsic value of nature and natural systems. Effectively managed tourism strengthens conservation by generating the financial and political support necessary to continue to prioritize protection and conservation efforts.

Aligning with Manitoba Tourism Strategy Goals

Manitoba's Provincial Parks are expected to play a key role in the overall success of the Manitoba Tourism Strategy. Parks provide several opportunities for new and exciting branding of world-class nature experiences. Manitoba Parks can form an integral part of the Manitoba Tourism Strategy's goal to "advance destination management," with improved investment in access and park experiences in a revised model. Improved park experiences and increased park accommodations will provide opportunities to capture more revenue from visitors and extend the stays of more people travelling to Manitoba for all purposes (currently, Manitoba only captures approximately

⁵⁶ British Columbia Ministry of Water, Land, and Air Protection, 2001, Economic Benefits of British Columbia's Provincial Parks

\$110/person visit vs. \$358 in other provinces). As the province begins to recover from COVID-19, Manitoba Parks can form a part of its recovery plan by offering greater opportunities to adventure and vacation in Manitoba, whether you come from Manitoba or beyond.