



SASKATCHEWAN TOURISM SYSTEM REVIEW

Consultation Summary

Prepared for:

Saskatchewan Tourism, Parks, Culture and Sport

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W e s t e r n M a n a g e m e n t C o n s u l t a n t s



the Tourism Company

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Disclaimer

This document attempts to faithfully summarize the views of hundreds of respondents to the consultation process. This report will be used as input by the consultants but will not bind them in their recommendations. The report does not represent the views of the consulting team. Some areas of the report lie outside the consulting mandate, yet they are identified here to provide a full representation of the input received.



1.0 Background and Introduction

Western Management Consultants and the Tourism Company were retained by Saskatchewan Tourism, Parks, Culture and Sport (TPCS) in September 2009 to review the Saskatchewan tourism system. An important element of this review involved seeking the input of the key stakeholders involved.

1.1 Consultation Process

Input was gathered in the following manner:

- Initial key stakeholder personal and telephone scoping interviews (7);
- Meetings with specific organizations:
 - TPCS Senior Management Team;
 - Tourism Saskatchewan Senior Management Team and staff;
 - Saskatchewan South East Tourism Association (Board);
 - Saskatchewan South West Tourism Association (AGM);
 - Saskatchewan West Central Tourism Association (Board);
 - Saskatchewan North Tourism Association (Board); and
 - Saskatchewan East Central Tourism Association (AGM).
- Focus Group Sessions with invited sector, DMO, CMO and other organization representatives:
 - Regina (2); and
 - Saskatoon (2).
- Stakeholder telephone interviews with specific stakeholders (16);
- Written input from Tourism Saskatchewan's President's Task Teams;
- Written input from Tourism Saskatchewan Board;
- Input from individual responses of session participants; and



- Input through a Web survey on IndustryMatters.com (45 responses), including:
 - Web input from some members of Saskatchewan Urban Municipalities Association (SUMA) members through a link sent to all members by SUMA; and
 - Web input from Saskatchewan Museum Association (SMA) members through a link sent to all members by SMA.

In addition to the notes we summarized from Board sessions, separate written summaries were submitted by:

- Saskatchewan South East Tourism Association;
- Saskatchewan South West Tourism Association;
- Saskatchewan West Central Tourism Association; and
- Saskatchewan North Tourism Association.

These submissions were also incorporated into the summary.

1.2 Context for the Summary

The consultation process is a very important part of the overall review of the Saskatchewan Tourism System. This document records the salient comments captured by the consultants in the process of talking to the key stakeholders. It reflects “What We Heard” in a fairly direct manner, which reflects our commitment to the respondents when we met with them. While the frequency of specific comments was noted and taken into account, the summary is not based on aggregation of the most frequent comments. All comments were reviewed and organized into areas of significant concern from a system review perspective.

The range and nature of comments were considered as input to the consultants’ process of determining areas for significant attention. The comments have been presented in bullet form in the sections following, and to the extent possible, the comment made is captured verbatim. Many of those who participated should recognize their specific comments in this material. There has been no attempt to justify or explain what has been heard by the consultants at this stage of the process. The reader should appreciate both the consensus areas represented and the range of the commentary.

Respondents were asked two main questions:



- What's working well and should be retained?
- What's not working so well and should be changed?

Ancillary questions were:

- What are the most important key issues/opportunities we need to address right away?
- For (your most important) key issues/opportunity, what is the solution you envision?

This report represents the findings of the consulting team, gathered in an arm's length process from the client. It is presented in the report following in this context.



2.0 What's Working Well and Should be Retained or Supported?

In order to provide some context to the issue areas that respondents might identify, the consultants wanted to get a sense as to whether people felt the whole system was “broken”.

The response reflected a strong belief that the fundamentals of the system were working well, and in particular:

- Relationships between government, TPCS, Tourism Saskatchewan, regions and other partners are largely professional, respectful and open.
- Tourism Saskatchewan as an arm's length marketing entity, working with regions, members, stakeholders and other partners.
- Saskatchewan Tourism Education Council, with all its work in tourism training and education for industry, was referred to almost unanimously as a well-functioning asset for the tourism sector in Saskatchewan.
- Regions and their members, with some support for the consolidation to five non-urban regions.
- The creation of a Ministry that includes Tourism, Parks, Culture and Sport with the implicit recognition of the importance of tourism and its connection with these other areas.
- Funding increases in recent years shows government recognition of the industry and has allowed TS to improve the quality of its work in a number of areas.

The response from virtually all corners of the province was that the system is fundamentally pretty strong, and many people had invested a great deal of effort in maintaining the existing tourism system in Saskatchewan since its foundation in 1995. While improvements could certainly be made in many areas, there was little appetite among respondents for wholesale change in the basic model.

Specific comments concerning what is working well included the following:



- The *image* of Saskatchewan has improved in the past three years;
- *Tourism Saskatchewan* (TS), as an organization, is fundamentally working well. It has highly capable professionals, task teams for stakeholder input, private sector partnerships, leveraged marketing, sponsorships, basic financial stability and has been stable as an organization for the past 15 years. TS is business-focused, flexible, arm's length and works with the grass roots as well as working well with regions. It hosts successful events such as HOST and the SUMMIT to obtain stakeholder input.
- The Tourism Saskatchewan Senior Management team was credited with raising the profile of tourism in government circles and beyond.
- *Tourism Regions* were thought to be doing well with the limited resources they have to work with. Their relationships with the grassroots tourism stakeholders and with members were considered a critical element in the system by many. Reducing to five rural regions was considered a good thing by many.
- *Strong DMOs* and CMOs, and increasingly those with DMF funding to support their marketing is considered a strength, putting more marketing money and partners in the marketing system.
- *Quality of Marketing* is improving, with particular mention of website improvements, videos and interactive marketing, maps, travel guides, visual marketing, consumer shows in and out of province, media relations, destination area marketing and targeted marketing outside the province. TS staff services in marketing are good and improving and communications between stakeholders is improving.
- *Cooperation* between ministries and Tourism Saskatchewan is improving, and TS advocacy to government is working well and has improved in past years.
- *Destination Area Development Planning* was identified as a strength.
- *Research, Analysis*, statistics, tracking data and the sharing of this information was identified as improving.
- *Product Strengths* identified included hunt/fish, camping, seven cities with urban parks, and a generally accessible and affordable product.



- *Event Hosting.* Capacity in Saskatchewan is strong, and in particular the volunteerism and hospitality of the people is well known.

The above comments underline the major strengths of the existing situation as assessed by responding stakeholders. In the “issues” sections following, comments are made on issues in virtually all of the areas that are listed in “what’s working well”. What the consultants take from this is respondents feel the fundamentals are good in Saskatchewan but in each area there is room for improvement. The sections following address comments on issues/opportunities for improvement.



3.0 Government

Many comments referenced the role of government, largely referring to the role of the Government of Saskatchewan. Comments that were particularly focused on the “all of government” category are organized in this section. Comments referring to specific ministries of government are referred following.

The comment threads relevant in this section are government needs to better understand tourism as an economic sector and driver, and government and public policy need to address the goal of growth for this sector. Interdepartmental coordination around goals is then possible.

In particular, a provincial tourism strategy is a desirable end, and particular focus on Aboriginal tourism development strategies and plans can only be accomplished by government working with aboriginal organizations.

Specific comments include:

- Government needs to decide if it is in tourism or not...if yes, then it needs to fund destination development, product development, and its own assets (heritage attractions, museums, parks), etc., to a level that will attract visitors and grow the industry.
- Public Policy does not value the tourism industry...needs to show acknowledgement.
- Single access point to government for tourism would be desirable (see TPCS).
- Politicians and civil servants need to understand tourism as an economic sector/driver. They need to appreciate the economic impact of tourism and its image impact for the province.
- Government funding/allocation to tourism is an issue – possible need to find other sources of financing tourism. The limited capacity of government to respond to tourism needs is an issue.
- Measure economic impact of tourism to support arguments.
- Need a provincial tourism strategy – a vision, mandates, economic development focus, then followed by organization and funding to support the vision/strategy; government should lead, with all key stakeholders involved.



- Aboriginal Tourism – If government is serious about it, resources are needed, relations with FSIN, ATASI, and Métis Nation of Saskatchewan (MNS) broad community engagement. Existing successes can be built upon, but needs certain government commitment:
 - Portrayal of First Nations conflicts should be done through First Nations, using their artifacts, traditions, values.
 - First Nations labour force for tourism is significant...yet needs a strong collaborative focus in education and training.
 - First Nations consulted too late in major planning. First Nations may want to be involved in/near their traditional territories.
 - Stats on visits to First Nations communities needed.
 - First Nations startup businesses are not receiving fair share of funding.
 - Nurture project-focused committee work, as it builds mutual understanding and respect – examples in Environment, Agriculture, Energy and Mines...(benefits referred to are for TS people to work on these committees).
 - Duplication with and uncertainty around role of Enterprise Saskatchewan remains an issue.

3.1 Accountability

Defining accountabilities are perceived to be the role of government as a whole, and there is a perceived lack of clarity in this area.

Specific comments include:

- Who is accountable to who in the tourism space – TPCS, TS, Regions, CMOs, DMOs, sector associations, etc.?
- Accountability costs in the present system are huge...large bureaucratic accountability requirements relative to the small amount of money that actually gets out into attracting visitors.



3.2 Legislation – The Tourism Act

Both general and specific comments were made about the Act. The concerns with the mandate of Tourism Saskatchewan are documented later and would imply a need to review legislation as well.

- Tourism Act needs revision...cumbersome, not understood, rigid, needs to be stated differently.
- The redundancy in mandates needs clarification.
- Governance requirements, if driven by legislation, need to be revisited.

3.3 Tourism Funding

While this area does not refer solely to the provincial government, the majority of comments referenced the government role:

- Funding for TS inadequate for it to do its mandated job.
- The way TS gets funding from government needs to change...need flexibility rather than tying new dollars to new programs.
- At the regional level:
 - Regional funding the same for past 11 years; not enough to manage administration, let alone marketing.
 - Regions cannot execute TS communication mandate due to inadequate funding. Capacity issues abound.
 - Regional funding inflexible, and bureaucratic to move funding around...can't respond quickly to market.
- Need to investigate secure, long-term funding streams that are alternative to government alone (DMF, etc.).
- Stabilize funding sources...overdependence on government at present.
- Investment attraction approach may be of value, but only if core infrastructure is supported by government.
- Money is needed for product development, business retention, pool of funds for strategic initiative, events, etc...pretty much across the board.



- Federal support is a key issue:
 - Renew WEPA agreements with Feds, but focus strategically.
 - Find ACOA type model for Saskatchewan through WED.
- MNS gets no funding even though they host significant events including Back to Batoche.

3.4 Administration of Funding

- Holdbacks: 10% of core marketing dollars are held back for three months while audit is done.
- Full audit required by TS, then TS reviews and audits the auditor...sometimes it is sent back.
- To move funds from print to a trade show (e.g.) you need written permission from Peer Review Committee...this is ridiculous.



4.0 Government Ministries

Comments were mainly about the role, mandate, and focus of different Ministries of government.

4.1 Tourism, Parks, Culture and Sport

In general, respondents supported the consolidation of functions in TPCS. However, people appeared not to know the breadth of the TPCS mandate or its specific roles in relation to tourism. Role clarity was something respondents looked forward to from TPCS.

The consultants noted that the Ministry was significantly less top of mind among respondents than was Tourism Saskatchewan. There were far fewer comments and suggestions about roles for TPCS than there were for TS, and often the consultants needed to prompt respondents to have them discuss TPCS.

Specific comments include:

- TPCS just out of the gates...a good change...needs to define its roles more clearly and share with industry.
- TPCS needs capacity, continuity, sustainable presence.
- TPCS has no vision, strategy for its role...needs to develop this (see provincial strategy requirements). A provincial tourism strategy would address this gap. Need role clarity and action – too many meetings and not enough action.
- TPCS should focus on intradepartmental coordination, interdepartmental coordination, government to government, borders, customer research, economic models, etc.:
 - Need to address silos within TPCS...get more coordination.
 - Interdepartmental coordination key – quality of all parts of the system need to be brought to a high level.
- Build the links between Economic Development and Tourism...communicate that tourism is economic development and a legitimate sector.



- Measure tourism, estimate impact, position industry for success.
- Minister briefings, meetings, letters, etc...what is synergistic role for government and TS in this area...to promote the understanding and support of tourism?

4.2 TPCS (Parks)

- Condition of some parks an embarrassment and perhaps dangerous.
- Parks needs to move on flagships, fix other parks.
- Consider shared management agreements for parks...like New Brunswick uses.
- Historic Parks must be developed for history, not the “50 amp” priority that Parks suggest is its focus.
- Parks need to be open beyond September 1 if we’re going to market shoulder season...they aren’t.
- Louis Riel trail development needs to move forward.

4.3 Infrastructure (various Ministries)

- Reinvestment in failing infrastructure is critical – highways.
- Roads, signage, cell phone coverage, GPS, service clusters need to be addressed.
- Improved highway entrances to the province...paving, pullouts, VRCs, signing.
- Improved tourism signing...not controlled by highways. Consistent standard across province...tourism-focused.

4.4 Other Ministries

A number of comments were made without reference to specific Ministries. These are documented in subject areas following and will be translated to departmental priorities/requirements in the consulting recommendations.



5.0 Product Development and Marketing Strategy

While the consultants are mandated to make recommendations on the organization of the tourism system in Saskatchewan and do not have a particular mandate in relation to product development or marketing advice, many comments referenced these areas. These comments are noted as they provide perspective on the issues and therefore on elements of organization that may be addressed in the recommendations.

5.1 Product Development – Overall

- Need a provincial tourism strategy.
- Flagship attractions need operation support after their capital support...i.e., decide which are strategic and then provide level of funding to get them off the ground...e.g., T-Rex, Qu'Appelle Valley, Indian Head, Métis Corridor.
- Develop three flagships – Prince Albert National Park, Diefenbaker Lake and Cypress Hills.
- Need critical mass of attractors, linked by events/festivals to overcome long distances between them. Facilitate packaging the experience. Clustering and theming is required. Our **history** is underdeveloped.
- Beyond product development, what is required is experience development, and this needs people to animate attractions.
- Iconic events – support strategic events...arts and culture, not just sport.
- Need a model for engaging First Nations and Métis organizations in attraction development.
- Visionary new roles could be developed – for example Saskatchewan could become the World Water Centre, the centre for studies of water issues, and a place where people came to see sustainable water solutions.
- Hotels are run down...basic product upgrades in tourism services, information/direction needed.



5.2 Destination Area Development and Product Development

- Need resources to build on the product development/planning work that has been done already; destination planning work will not realize gains unless funding is put behind plans.
- Continue and build on Flagship strategy...move forward with the highest potential routes/clusters. (Three flagships mentioned – Prince Albert National Park, Diefenbaker Lake and Cypress Hills Interprovincial Park.)
- Regional parks are underfunded, very significant tourism attractors.
- Need to develop iconic areas strategically by resourcing these areas in order to build tourism. Growth would occur around the province through spillover.
- Government needs to “lay the pipe” first (roads, airports, etc.), then go after international investment attraction...so need this investment attraction function, probably in TPCS.
- In the absence of a provincial plan, product development is left on municipal backs and they don’t have the capacity.

5.3 Event Development

- Develop and promote iconic events...i.e., be strategic in the development and promotion of major events.
- Promote events more effectively – a separate events guide is not recommended.
- Event management and training required (as noted under the Quality Assurance section (6.2) following).

5.4 Arts and Culture Development

- Overall sense is Arts and Culture has not been a focus area in tourism development. Integration within TPCS may be an opportunity, but significant work needs to be done in this area.
- Lack of funding for artists is a key issue.



- No mechanisms to capture legacy or engage professional communication in the arts community.
- Little communication between arts and culture groups and regional tourism staff. Also not in TS mandate, so little communication from that perspective.
- Lack of accreditation of interpreters.
- Heritage Foundation has been desperately underfunded for years...need funds to develop product.

5.5 Marketing Strategy

5.5.1 Strategy and Programs

- No consistent brand and no brand cohesiveness across regions.
- Historic focus on the south is a limiting approach for TS. Needs more northern and winter marketing.
- The myth that TS does not do in-province marketing is not written anywhere...it is perpetuated by those who don't want to be in that area. TS does an umbrella campaign, which is good. The regions should have a lot more input into that campaign to make it more effective.
- In-province programs should be expanded, as this will spur product growth and eventually allow us to get to further markets.
- TS "Going Places" is a waste of money...should be sent electronically.
- Festival and events sector is not promoted well...needs more focus...more out of province marketing, and a strategic approach; i.e., go with the winners. An event strategy would be a benefit.
- MCIT not well serviced by TS. Too watered down and not strategically focused on main cities with product. Needs a provincial strategic focus, a marketing team and selling together under one banner, as was done in the past.



5.5.2 Process and Involvement Issues

- Little if any input from regions into marketing plans of TS...they should be a key input source.
- “Two region” marketing requirement with incremental funds is ridiculous...needs to be removed.
- Incremental money should all go to regions for marketing, and without the requirement of two regions.
- TS does nothing for the operator...regions work directly with the operator and without regions, many would be out of business.
- Lack of francophone marketing, which has done well in other places – Manitoba and Alberta – this is east/west marketing focused on Quebec market.
- Difficult for sector associations (such as SOA) to work with regions as there are seven regions to coordinate.

5.6 Web Marketing

- Capturing the power of e-marketing is a key strategic lever for Saskatchewan...we need to move strongly on it.
- Outfitting sector has a searchable database so marketers can connect inquirers directly with several outfitters who meet criteria. Very appreciated. We need to expand this kind of capability beyond outfitting.
- Linkages, searchability, search criteria, product review/standards all need significant upgrading in our Web presentation.
- Lots of members don't have email or high speed service...This is a limiting factor.



6.0 Quality and Hospitality

There was a strong consensus that Saskatchewan was doing well relative to other jurisdictions in the tourism training area. However, improvement was also suggested on a number of fronts.

There was also a strongly felt consensus that many Saskatchewan tourism products were “below the bar” in terms of quality and some form of quality assurance program was justified. The most obvious area to begin such a program was thought to be in the accommodation sector.

6.1 Training and Accreditation

- STEC highly regarded and credited with providing strong training programs.
- More visibility for STEC would improve results.
- Fund accreditation training and recognize graduates.
- Partner training into school system.
- Event management training.
- Volunteer management training.

6.2 Quality Assurance

- Need to upgrade quality in all subsectors of tourism...Average is low relative to competition.
- Need Quality Assurance Program (QAP) in place, province-wide.
- Hotels need QAP – they are run down. Need Accommodation rating system.
- Need a Green tourism development (e.g., Green key) commitment, measurement and recognition.
- Taxi quality is a big issue that should be addressed. Needs City and tourism focus.



6.3 Visitor Reception Centres

- Present condition is an embarrassment – dated and run down.
- Not enough centres at Canada/US borders.
- Need overhaul – signing, better facilities, paving, more visibility, open year round?, better trained staff, more suggestive selling etc.
- Border crossing infrastructure (air and highway) needs to be in place with good hospitality training.
- Sub-regional (community run) VICs are on inconsistent standards...need shared standards/criteria for the DMO-based VICs.



7.0 Tourism Saskatchewan

While respondents had commented that fundamentally the tourism system and Tourism Saskatchewan were working, many specific comments about issues focused on Tourism Saskatchewan as an organization. Comments are organized under the various headings following.

7.1 Overall

- Revenue and value for money review required of TS Organization – communications, relation to region/industry, ROI of staff (overstaffed?), management review, programs currently delivered and ROI on those programs.
- TS mandate is too broad for its funding.

7.2 Governance (Tourism Saskatchewan, Government)

Legislated functions are more than can be accomplished with the funds available. Either funding needs to be increased or the mandate needs to be narrowed.

- VRC back to government?
- Tourism planning/product development role is facilitation...more teeth if this function was in government.
- Advocacy is very difficult between agency like TS and government.
- Use of Carver Governance exacerbates the issues...one can avoid micromanagement without a wholesale following of Carver.

7.3 Tourism Saskatchewan Board Structure and Functions

Many organizations identify the structure, governance model and organization of Tourism Saskatchewan as a key issue. Many felt this issue goes back to the legislated mandate and Tourism Saskatchewan has worked quite well given its limitations.

- TS governance structure considered mildly to significantly dysfunctional by a majority of respondents.



- TS Board structure should change to individual appointments, from organizational appointees...Due to organizational appointees Board is weak and is missing opportunities to engage a skills-based Board.
- Board spends its time on policy review...it needs more time on the work of TS and its outcomes.
- Under the Carver governance model, staffing has exploded...Board does not have control.
- Perceived to be increasingly an old boys club.
- Requirement for two AGMs is not necessary and should be changed.
- Requirement for full Audit of regional Boards is expensive and unnecessary.

7.4 TS Operations

- Integrate CMO/DMO cooperation/involvement needs to be in place – TS attitude to CMOs needs to change.
- TS staff need to improve knowledge and understanding of the tourism product through FAM tours/visits.
- Some felt there was no meaningful input from regions into marketing plans of TS.
- A significant issue concerning the style of Tourism Saskatchewan was voiced by a minority, and is therefore documented here because it is strongly felt by those responding. In the view of these respondents, TS has been “disrespectful of our members:
 - In the way they visit, how long they stay, their lack of listening to us...they usually talk and we listen, their profligate spending when we have little/no budget. They are cocky, have a cone of silence around their own operations and information, and they perpetuate a ‘we and they’ type of attitude.
 - Comes to make speeches to our Board but does not attend our AGM that same afternoon.
 - Holds provincial meeting in our region and doesn’t invite the regional organization.
 - TS has not shared information when requested.”



8.0 Regional Structure

A key focus area for issues in the present system lies in the regional approach, structure, funding, mandates and relationships with Tourism Saskatchewan. These issues are broken down into subject areas in the sections following.

8.1 Role Clarity and Relationship to Tourism Saskatchewan

- Lack of clarity in roles, accountability, mandate, etc.
- What is the role of the region? Are they the link to the front line? What are they supposed to do...help develop? or market?
- Duplication, inefficient, confusing, too many layers...
- Review the regional structure - too many? Not consistent in policy/procedures for staff, Board, etc.
- TS Board relations with regions are not working well.
- TS lacks sensitivity to the capacity of regions to respond - late requests, etc., are beyond small staffing and capacity.
- Review all the tourism layers - TS, Regions, Enterprise Regions, local tourism groups, sector organizations, President's Task Teams, sector teams etc to establish clear, unduplicated roles and mandates.

8.2 Regional Funding and Marketing

- PEER Review has found large inconsistencies in regional product marketing, priority for hunt and fish, lack of MCIT. Incremental submissions are not creative as intended.
- Need to get regions working together more...create specific initiatives for them to work within.
- Regional funding is inadequate to allow them to do their marketing job. Conditional funding (TS pays \$70K but takes \$18K for their provincial program) adds to the issue.



8.3 Regions, Membership Structures, and Members

- Regions are the crux of membership growth, yet they are not funded sufficiently to attract members – clear benefits statement needed.
- Regions are emphatic that membership is a key way of identifying and focusing their services.
- REDAs and RROC are impacting the cities, adding to confusion.
- No DMO recognition, yet their spending exceeds many/most regions.
- TS gets a good share of members through DMOs, which has no ROI from bringing them in.
- Regions attract and nurture members. Members look to regions for help.
- Regional association is the voice for operators, not TS.
- The industry operators do not feel connected with TS...evidenced by the few that show up at meetings relative to other members...sectors, towns and cities, etc.
- No First Nations recognition within the regional structure.
- Membership dollars are limited and servicing members is costly...is there a better way?
- TS is member-based organization but is not in control of membership. Whole process is confusing to members.
- Has TS evolved out of need for membership?



8.4 Regional Functions and Overlaps

- Enterprise Saskatchewan increases confusion...is it involved in product development...now mostly in policy? Is it/should it be in tourism development?
- Regions should do product development as their main area of focus

8.5 Regional Roles, Tourism Saskatchewan and Tourism Operators

- Lack of linkage and relevance between TS and operators.
- Engagement of industry is a key issue.
- Close communication with individual operators needed.
- TS needs to get to regions and operators more.
- Senior management in regions need to relate to and work with TS more; the capacity of regions to do this needs to be addressed.

8.6 Regional Boundaries

- Regional boundaries need to be revisited, perhaps using latitude lines instead of existing system.
- We need only three regions - one north, one southeast, one southwest.

8.7 Creation of Destination Marketing Areas (DMAs)

- TS creating DMAs, funding them at over 50% of the region's marketing fund, and supporting them to market undermines the Region... the idea and process of creating these new entities/organizations is not understood, if there is a process or plan at all.
- The example is in Prince Albert National Park, and could be considered a new region created within North...this is an issue.



9.0 Communications

While communications challenges are implied in all areas identified above, communications was also specifically mentioned by many respondents. Key comments included the following:

- Poor communications between all layers – TS, Regions, Sectors, Enterprise Regions, TPCS.
- How do we speak to the audiences, and who does this? There are too many dispersed messages and not enough funding to reach everyone.
- Need two-way sharing of information. TS does not loop back to front line to gather data on success...example of Rural Escapes.
- Regions, due to capacity limits, cannot always deliver TS information to members as directed by TS.
- Awareness and understanding of tourism in key audiences – government, communities, other sectors, citizens – has not been accomplished. TS has government funding, but has not succeeded in communicating importance of tourism.
- TS has not advocated for additional regional funding. Rather it has taken additional funding and put it into new TS staffing, while regions are unable to function.



10.0 Other Relevant Comments

Many comments were made that could be included in the “other” category. While these have been captured in the individual reports from responding organizations, they have not been repeated here unless they have a direct connection to the System Review.

The comments following were considered of particular interest in terms of the System Review.

- Saskatchewan people do not “self-promote” and they need to do so for success.
- Saskatchewan “image” is a detriment, although this is changing as our economic position improves.
- Focus on **goal**...moving Saskatchewan to another, higher level of tourism service.
- **Attitude**: End turf wars and infighting over money...Zero sum logic.



11.0 Concluding Comments

The consultation process is a very important part of the overall review of the Saskatchewan Tourism System. This document records the salient comments captured by the consultants in the process of talking to the key stakeholders. It reflects “What We Heard” in a fairly direct manner, which reflects our commitment to the respondents when we met with them. We would like to sincerely thank all those participants and respondents who gave their significant time and insight to this stage of the process.

An overriding focus of many respondents should be captured here. The view of many was that we should stop studying and simply take action on the important matters. This *bias to action* was heard in many sessions throughout the province. What is important is that action be taken on the *right things*, and *in the right order*. The consultants will be able to help TPCS define the key actions in the coming weeks and months.

In the next stage of the process, the consultants will work on the key issues and ultimately provide findings and recommendations to Saskatchewan Tourism, Parks, Culture and Sport.

