

Tourism Economic Impact Assessment for the Region of Portage la Prairie



**PORTAGE
LA PRAIRIE**

MANITOBA, CANADA

Island on the Prairies

December 2023

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Five top takeaways



Tourism in the Portage Region has an overall estimated annual impact on the Manitoba economy of \$29.6 million (GDP).



Roughly 125,000 people stay in Portage's hotels and motels per year – for sports tournaments, events and festivals as well as business.

Visitors spent an estimated \$8.1 million on accommodations and campgrounds, and another \$5.5 million on restaurants and pubs (among other things).

Tourism generates an estimated 445 jobs (directly serving visitors and indirectly in spin-off and supporting industries).



Visitors to Portage generate \$6.5 million in tax revenue (including \$815,000 to local governments).

Recommendations

- Focus tourism development around four opportunities: sports, Indigenous experiences, agri and ecotourism
- Market events as visitor attractors
- Expand the tourism stakeholder committee to increase participation, collaboration and buy-in
- Create a permanent tourism function
- Co-ordinate and collect visitor data to track impact



Where to start in 2024



Market

- Four planned, ticketed events in lead opportunity sectors: Portage Cup, Portage Ex, Adventure Games, Air Show



Build

- Permanent staffed tourism function
- Key visitor tools – events calendar, visitor guide, etc.



Gather

- Visitor data from tourism operators to update the Portage Model

About This Project

This chapter briefly summarizes the project context, objectives and methodology.

Context and background

Background

The Region of Portage la Prairie is home to a growing cluster of international agri-food manufacturers and research facilities. Less well-known for visitors are Portage's natural assets and recreational and cultural amenities. This combination creates significant opportunities to realize the Region's ambitious vision to be recognized as one of Manitoba's most desirable tourist locations. Portage Regional Economic Development (PRED) and specifically the Portage Regional Tourism Committee (PRTC) supported by its place brand Island on the Prairies is "on a strategic journey to ensure that tourism continues to be a self-sustaining industry and grows to meet the needs of the tourism stakeholders".

A key goal of the PRTC's Strategic Plan 2021-2026 is to grow local support for tourism. To harness tourism as an economic driver, Portage needs to build a comprehensive business case and identify transformational strategies to drive its plans.

About this project

As part of its strategic plans, the PRTC needs to benchmark and track the economic impact of tourism within the wider regional economy while also creating strategies to grow tourism that will have the greatest impact on the economy and the Region's quality of life.

To support these dual goals, PRED and the PRTC commissioned a team of consultants led by:

- Margaret Egan, Sinclair Barnes Limited
- Mary Agnes Welch, Probe Research Inc.
- Wilf Falk, former Chief Statistician of Manitoba, now with the Georgetown Newbury Group

The project was carried out between September and December 2023 and relied heavily on the input and guidance of Portage la Prairie's tourism leaders and operators. As well, we worked closely with Eve O'Leary, PRED's Director of Economic Development, and Kellie Verwey, the Region's Tourism Coordinator. We are very grateful for their active and valuable collaboration.

What we did

To benchmark the economic value of tourism and to offer some recommendations for growth, the consulting team did the following:

Measured visitor numbers and value

- Estimated visitor numbers in the past year, with a focus on “heads in beds”
- Estimated spending patterns and impact (spending, GDP value, jobs and tax revenue)
- Created an economic impact model that can be reproduced relatively easily to allow the PRTC (and other communities) to estimate their tourism impact

Consulted stakeholders, tourism operators and the wider community

- In-depth interviews with more than 35 stakeholders and site visits to attractions and tourism assets
- A short community survey (N=380), to identify the Region’s hidden gems and gaps in the visitor experience

Determined the key drivers of tourism to Portage and the competition

- Based on qualitative data-gathering

Created recommendations and strategies for future investment and collaboration

- With a focus on the Region’s existing strategic goals

Tourism Economic Impact

In this chapter, we estimate the impact of visitors on the Region's economy, jobs and tax revenue.



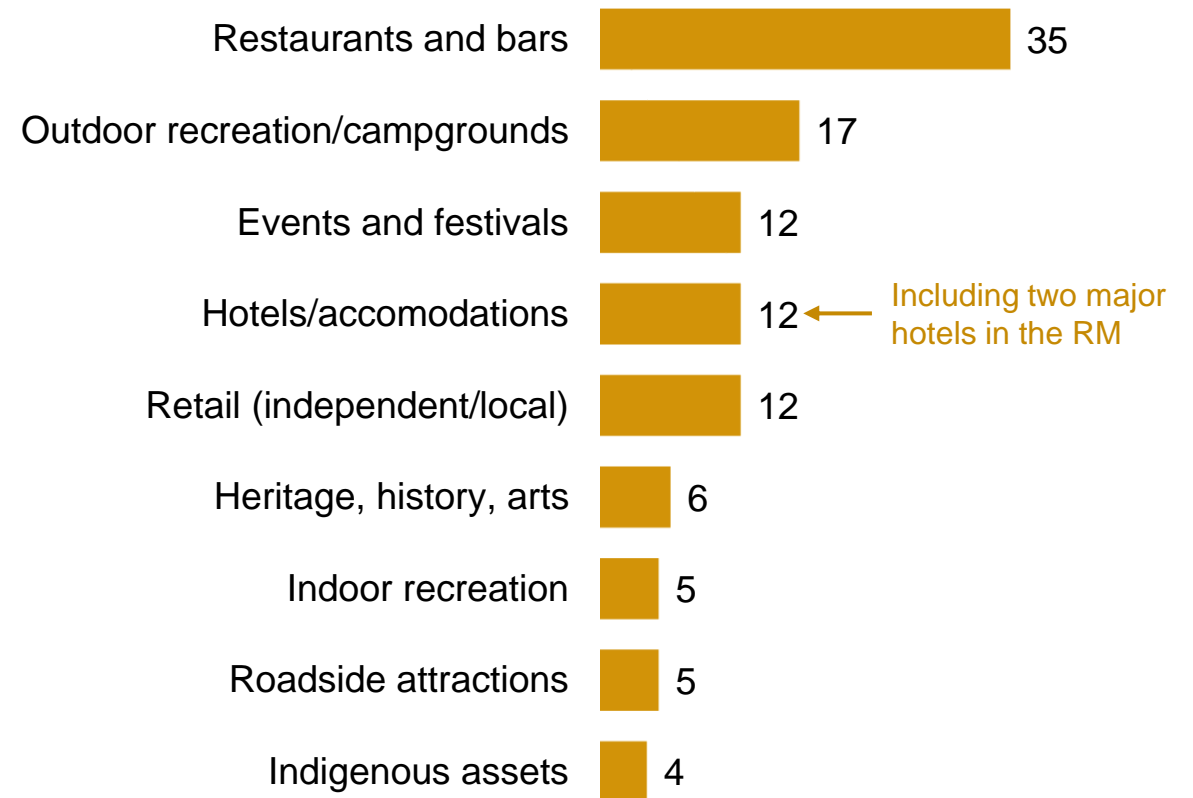
The Region's tourism assets

The Portage Region has 110 tourism assets – the kinds of museums, local shops, walking and biking trails, family-friendly waterparks, summer festivals and quirky roadside attractions that are unique to Portage and that ensure visitors have a complete experience.

About 20 per cent of these are in the City of Portage la Prairie, but the rest are in the RM, including many of the major draws such as Delta Beach, Delta Marsh, the National Indigenous Residential School Museum and the Manitoba Airshow.

However, only about 20 per cent of Portage's assets are market ready, meaning they are reliable enough to support sustained tourism, have strong branding and website content, do some of their own marketing and can be part of packages and discounts with other operators to entice visitors. Many of Portage's assets are in need of significant improvements and upgrades to meet and exceed visitor expectations and to bring them up to market readiness.

Number of tourism assets by category



Tracking visitors to the Region

Improvements to data-gathering by tourism operators would strengthen our understanding of who visits, how long they stay and what they spend. We have some anecdotal insights from operators (detailed on Page 24), and some attractions do keep useful data that help us calibrate the size of some drivers of visitation. But more work gathering and tracking day trippers would be valuable.

As well, Travel Manitoba tracks visitation patterns throughout the province using mobile phone tracking. In 2019, before the pandemic, about 73 per cent of Portage's visitors were from Manitoba (mostly from Winnipeg, but some from Brandon and Winkler) and about 21 per cent were from elsewhere in Canada. Another six per cent were from the United States and beyond.



In 2023, the Whoop & Hollar Folk Festival brought an estimated 200 out-of-towners to Portage. That includes about 50 people who camped at the festival for the weekend and likely spent additional dollars in town on meals, shopping and gas.

Fort la Reine sold over 2,650 admission tickets and welcomed 600 students in the summer of 2023. About 60 per cent of those were from outside the Portage Region.



Tourism's total economic impact

Total estimated visitors to the Portage Region: 125,000

An estimate of how many visitors spent a night (or more) in the Region at hotels and motels between Sept. 2022 and Aug. 2023. Another 1,400 people stay at the Region's campgrounds on average each day during the 15-week summer season.

Total direct spending by visitors: \$26.5 million

An estimate of what visitors spent in the Region between Sept. 2022 and Aug. 2023 on fuel, accommodations, food, attractions, VLTs, etc.

GDP: \$29.6 million

The final impact on the Manitoba-wide economy – the amount of direct and spin-off visitor spending that remains in the province and the value of goods and services produced in the Manitoba economy. It's not possible to isolate the GDP impact on Portage alone, though a great deal of the overall impact would be felt in the Region.

Employment: 445 jobs

Both part-time and full-time jobs, direct and in spin-off industries.

Tax revenue: \$6.5 million

Taxes to all three levels of government generated by visitors to Portage, including income taxes, PST, GST and others.

Caution: These economic impacts should be treated as general estimates only and never as absolutes. Having said that, these estimates are very conservative, with some of our assumptions detailed in the following pages. The spending, occupancy rates and length-of-stay estimates were deliberately calibrated to the low end of the scale to ensure credibility.

As well, these estimates do not include spending by day trippers because very little reliable data exists on the number of short, tourism-driven visits to Portage's attractions. Similarly, these estimates do not include spending by drive-through travellers who may stop in Portage for gas or a meal.

A detailed report on the economic impact figures is available in Appendix D, with a glossary of terms on Page 78.

Key economic impact figures: Breakdown

	Hotel guests	Campers
Capacity	344 hotel rooms	615 campsites (seasonal and overnight)
Estimated occupancy	50%	65%
Estimated average party size	2 people (staying on average 1.5 nights)	3.5 people
Estimated number of visitors	125,500	113,900 person days (not unique visitors)
Estimated nightly rate	\$113 including taxes*	\$30 on average for overnight stays, \$2,300 per season for seasonal sites
Estimated total spending (meals, shopping, accommodations, etc.)	\$20.8 million	\$5.7 million
Estimated total tax revenue (all levels of government, including spin-off revenue)	\$5.2 million (including \$700,000 to local governments)	\$1.3 million (including \$115,000 to local governments)
Estimated jobs (direct and spin-off)	345 jobs	100 jobs
Estimated GDP impact (to the province)	\$22.9 million	\$6.7 million

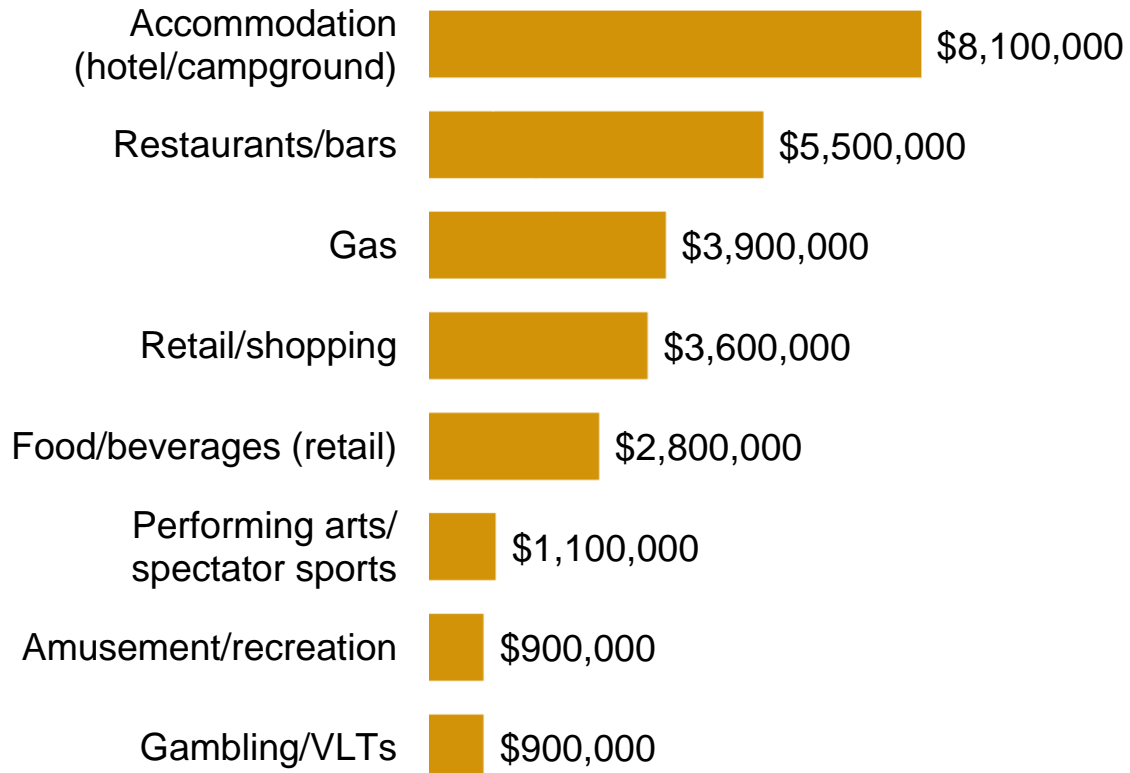
*Members of the PRTC, in vetting and validating these estimates, felt this figure was low. However, we opted to keep this estimate at \$113 to ensure our impact estimates remain conservative, partly because the impact estimates are driven so strongly by the “big ticket item” of accommodation costs.

How we estimated tourism's impact

- 1** We focused on “heads in beds” – hotel and motel guests and short-stay and seasonal campers. The tourism industry typically defines a tourist as someone who travelled more than 40km to visit a location, so using overnight visitors as the foundational input for this economic impact study makes sense. We can be confident nearly all heads in beds (or tents) are indeed visitors. As well, overnight visitors tend to be the high-value ones. They spend at restaurants, shops and attractions to a higher degree than day trippers.
- 2** We approached local accommodation operators for data on occupancy rates, visitor spending and other visitation data. Responses from the Region's hotels and campgrounds was limited, however. So, in most cases, we used provincial and publicly available data to estimate occupancy rates, average visitors per room and other inputs.
- 3** We estimated the average daily visitor spend on restaurants, accommodations, attractions, gas, etc. This helped determine the total visitor spending in the Region, as well as the spin-off or trickle-down effects of this spending.
- 4** We vetted and validated our estimates with local operators, including the PRTC, to ensure we had not over- or underestimated occupancy rates, party size and spending.
- 5** The visitor spending figures were run through an economic model (the same one used by the Manitoba Bureau of Statistics) to estimate the direct and spin-off effects of visitor spending. This includes the spending that hotels, gas stations, attractions and other tourism-related business do on staff, supplies, etc. It also includes trickle-down effects of visitor spending – hotel workers who then spend their wages in the community, for example, or suppliers to hotels who pay their own suppliers. The model also helps estimate the spin-off effects on jobs and tax revenue. The multipliers used in this model to estimate the spin-off effects of visitor spending are those of Statistics Canada from 2020, the best available. Details of these spending and spin-off figures are on the next page.

Visitor spending estimates

Estimated total visitor spending in each category (2022-2023)



Highlights of key estimates

(Detailed estimates are available in Appendix D)

- 344 hotel rooms in the Region at eight properties (including the Barker Suites at Southport, but not including the former Days Inn, now the Howard Johnson by Wyndham, which was closed during the study period)
- 615 campsites, over six campgrounds
- 50% hotel occupancy rate on average*, and a 65% campsite occupancy rate
- Average room rate: \$113 with taxes. Rack rates range from \$85 to \$140 per night, however discounted rates are common, so we used an estimate on the low end of the scale
- Average length stay: 1.5 nights for hotels
- Average daily hotel visitor spending on restaurants and bars: \$30 per person for the first day and \$15 for the second
- Average spending on gas: \$40 per person for a 1.5-night hotel stay

*To compare, occupancy rate data gathered by Domo and generously supplied by Travel Manitoba suggests that the average occupancy of Manitoba hotels outside of Winnipeg and Brandon was 63% during our study period. For the Morden Winkler area, it was 49%. No specific data exists yet for the Portage Region, so we used an estimate on the very low end of available Domo data.

Impact of future tourism growth

Small increases to visitor stays and spending can have a significant effect on the Region's local economy. For example:

- If average hotel occupancy increases from 50 per cent to 53 per cent, this adds an additional 8,000 new visitors to the Region and increases consumer spending by about \$1.3 million.
- If average hotel stays are increased from 1.5 night to 2, the total visitor spending could increase by as much as \$4 million.
- Similarly, if average visitor spending in high-value areas such as restaurants and bars increased by an additional \$10 a day, this adds nearly \$2 million in total visitor spending.



Next steps in impact data gathering

Collecting good visitor data over the long term

The economic impact figures in this report are estimates – reasonable ones but estimates all the same. Like nearly every smaller jurisdiction, establishing visitor counts, spending and origins is difficult, but the PRTC could lead by building trust and collaboration with accommodation operators to create a low-barrier process to gather their data, including:

- Average occupancy rates and average party size for both hotels and campsites
- Average room/site rates
- Average length of stay for both hotels and seasonal/overnight sites
- Visitor origins (from postal codes, for example) to allow the PRTC to better target marketing.

The PRTC could also ensure all major hotels in the Region are contributing to hotel occupancy data tracked by Travel Manitoba (gathered by the data firm STR). Four hotels in a region are needed to create localized findings, and Portage is one short.

Similarly, there is a significant opportunity to support attractions, festivals and venues to gather at least basic data on day trippers coming from 40km or more away – their numbers, their origins and their visitation patterns.

Updating the Portage Model

As part of this project, the tool created to calculate tourism's economic impact in Portage can also be used in-house by the PRTC to track growth over time. The specific inputs and estimates would need to be reviewed and refined each time – and ideally updated with actual data from the Region's hotels and accommodations. The impact multipliers would also need to be updated occasionally. But the tool can be used to benchmark the impact of increased overnight visitors, major events that might boost average spending on restaurants and attractions and other variables.

The Portage Model can also be replicated easily in other smaller tourism destinations in Manitoba who may wish to learn from Portage's innovation.

What We Heard

In this chapter, we summarize what we heard from stakeholders, local leaders, tourism operators and the community at large that helped inform our insights and recommendations.

What stakeholders told us

This Tourism Economic Impact Assessment conducted more than 35 site visits and interviews with stakeholders, municipal leaders and others with specific knowledge of Portage's tourism assets and potential. These interviews focused on practical ideas to maximize the impact of tourism and the current barriers operators and businesspeople face in doing so.

As background, we note that there is overwhelming support for tourism as a sustainable economic development driver. Stakeholders – most of whom are also Portage residents – are confident tourism can grow in a way that benefits stakeholders, promotes the Portage brand in a positive manner while also honouring the wishes of the community to maintain the character of their Region.

The insights that follow summarize the key themes gleaned from stakeholders, and these insights also informed our understanding of the drivers of tourism and our recommendations for growth. (A full list of those interviewed is included in the Appendix.)

Stakeholders are cautiously optimistic

“ It's not there yet. Not everyone buys into tourism yet, but it is better since PRED took over. So, I'm optimistic.

There is a lack of common understanding

“ Some people are against tourism, but we really haven't laid out the benefit, the value of tourism, and it's not just the revenue or more events – all these things – the recreation, the museums, the nicer shops, protecting the rural way of life. They're for us too, the residents. It all comes down to quality of life.

And a lack of municipal self-esteem

“ We are our own worst critics. We talk ourselves down, so how can we expect visitors to become interested?

What stakeholders told us (cont'd)

Key gap: a tourism department

- “ We don't make it easy for visitors to know what to do, what's open and when. There's no one stop shop.
- “ A central events calendar that visitors know where to find – that would make such a difference.

Confusion about who funds tourism

- “ I think that's not clear. I think they're trying to earmark the accommodation tax for this.

Portage can be great hosts

- “ We're great when we collaborate like the hockey tournaments, but we don't do that enough.

Losing volunteers is a problem

- “ We have to find a way of retaining volunteers and bringing on new ones so that the same people aren't asked to do everything.

Location as an advantage

- “ If we make things interesting for people, then our location is not a problem – 45 minutes from Winnipeg or Brandon.

Restaurant scene is improving

- “ Yes, we've got the franchises, which work great for hockey teams, and there are some good ethnic ones as well which newcomers are opening.

Crime is an issue

- “ I do think people overstate this, but it's something we think about because we're looking at bringing in more sports rentals.

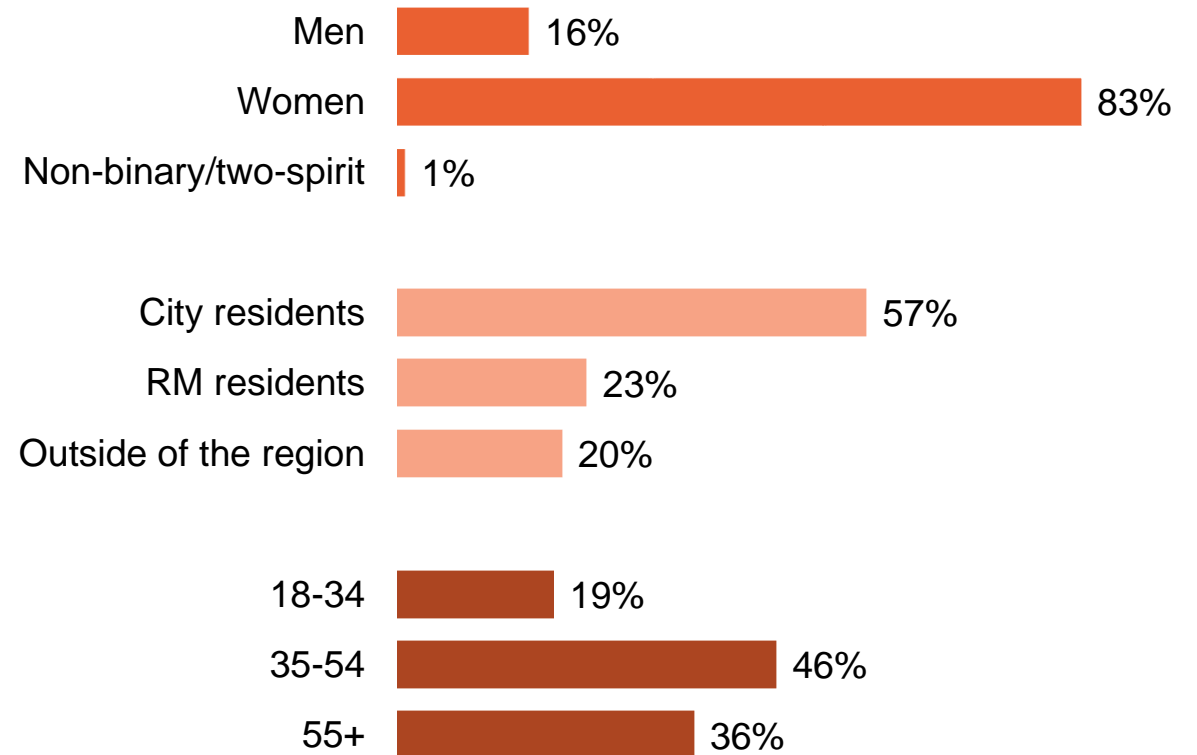
What the community told us

In addition to stakeholder interviews, we also conducted and analyzed a short community survey to understand what regional residents (and some visitors) think makes Portage unique and how it could develop visitation.

This survey was:

- In field starting Oct. 31, 2023 for four weeks
- Shared on social media (through the Island on the Prairies brand, PRED's channels and amplified by members of the PRTC)
- While the survey was completed by 380 people, it is not statistically representative of the regional population so unlike a true public opinion poll, the results can't be applied to the Region's population as a whole. However, its insights are valuable in understanding the public's views on Portage's tourism potential.

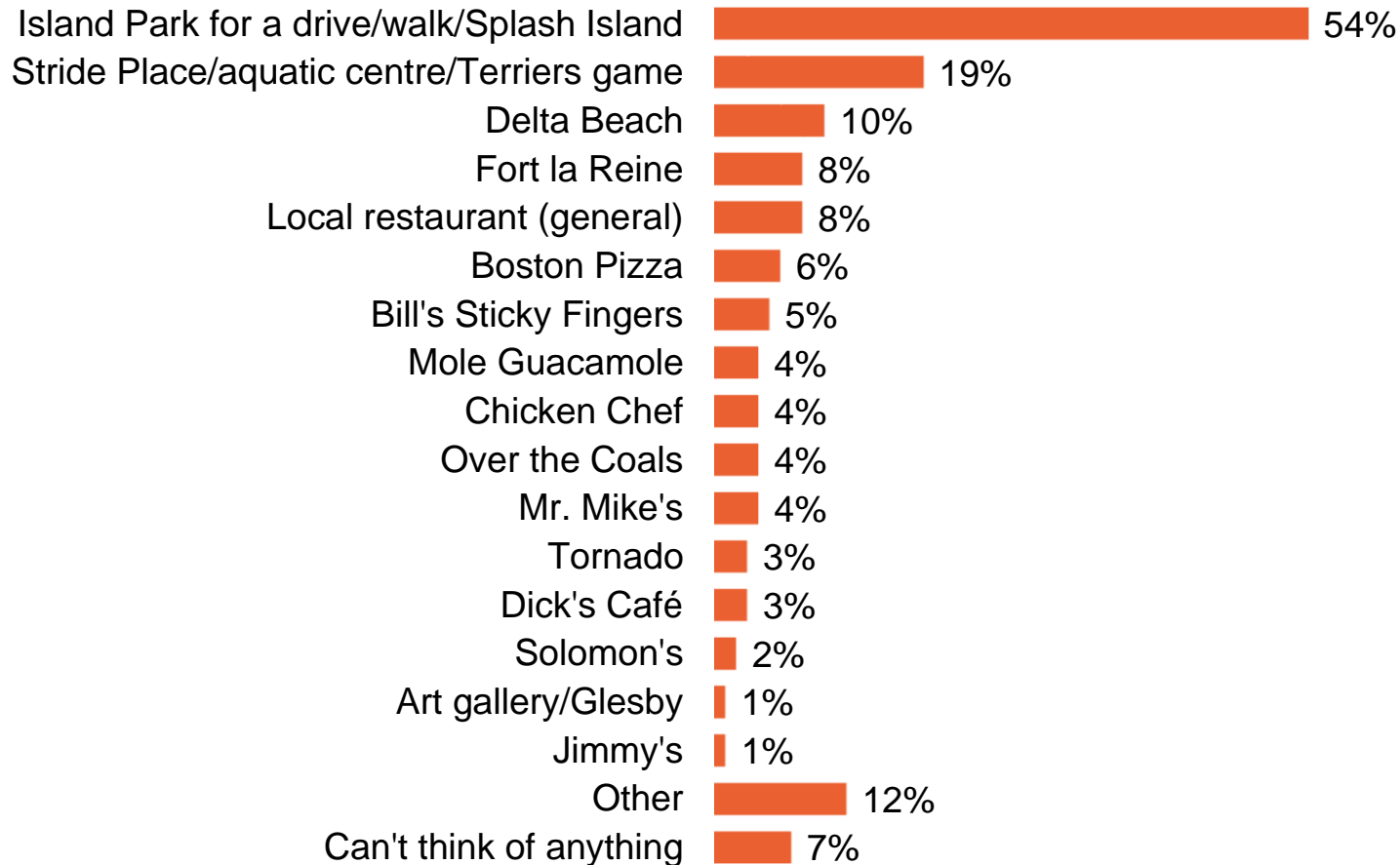
Profile of N=380 respondents



Portage's top attractions

Island Park, Stride Place and various restaurants top the list of places residents take visitors

Q1. When family and friends visit Portage – the City and the RM – where do you take them? (Could be a restaurant, shop, museum, park, attraction – a hidden gem or something well-known.)



Outdoor/recreation: 83%



Restaurants: 44%

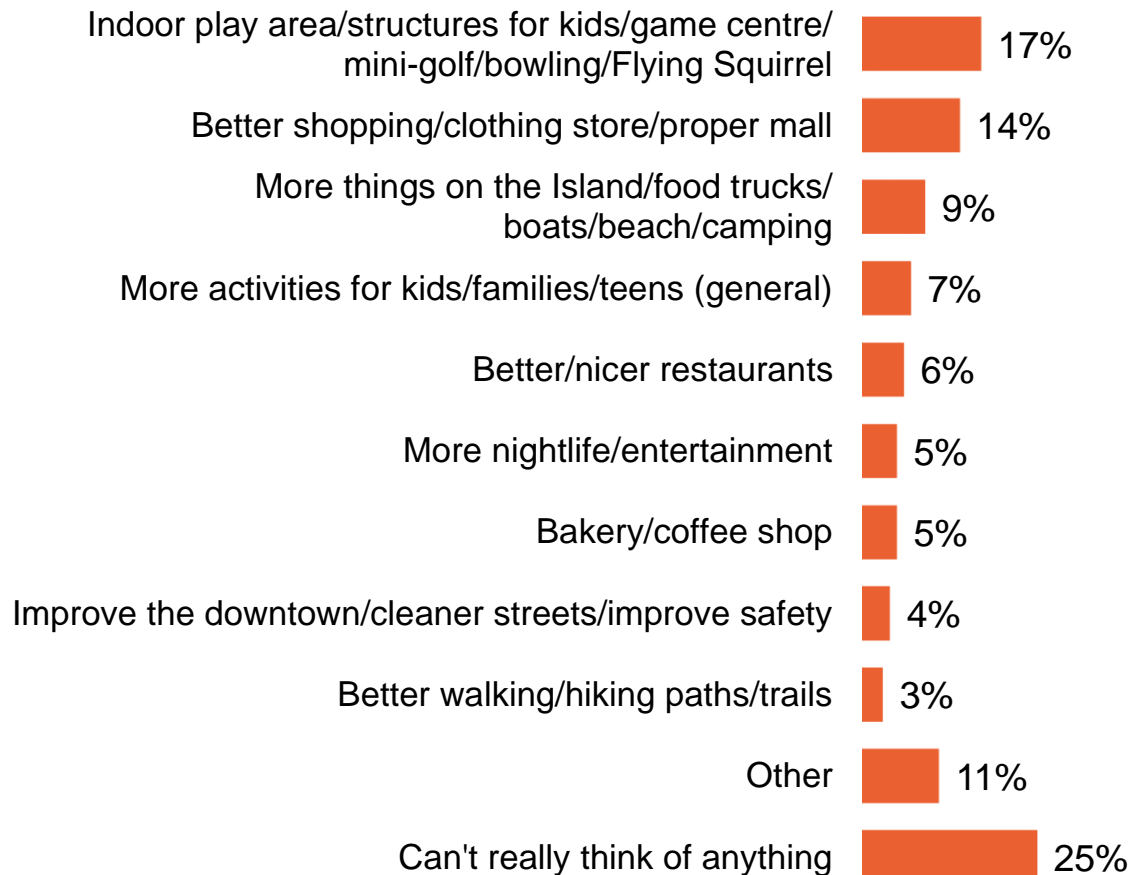


History/art: 9%

Community ideas for tourism growth

Attractions for families, especially indoors, along with better shopping and eating top the wish list

Q3. What is one thing you wish visitors could do or experience in Portage? What is the area missing that could appeal to visitors?



“ It would be nice if there was more fun things to do, escape rooms, bowling, laser tag, arcades. Something both children and adults can part take in and have fun with!

“ A shopping mall. Shopping local is always encouraged but where does one buy clothes. It's very limited here.

“ Pedal boats for Crescent Lake. Canoes & kayaks are a great addition but pedal boats for young kids would be great.

“ More good restaurants (no more pizza or chicken places) and a nice coffee shop/bakery.

“ A place to go and dance and have a couple drinks where you feel safe.

“ A non-chain coffee shop that focuses on good baking and lattes.

“ The core area of town has become less safe and less attractive. Our downtown is receiving a make-over, but it is not safe to take a stroll. Especially after dark.

Drivers of Tourism

A photograph of a water park with a large, multi-lane slide structure in the background. In the foreground, a swimming pool is filled with people of various ages. The scene is set outdoors with trees in the background. The entire image has a semi-transparent green overlay.

In this chapter, we look at the drivers of Portage tourism identified by stakeholders, specifically:

- Who visits Portage now?
- The role of Portage's attractions, events, marketing initiatives and enabling environment

Who visits now (and why?)

Why do people visit the Region of Portage la Prairie? And how can Portage encourage them – and other similar visitors – to visit more often, do more things, stay longer and spend more? To answer those questions, Portage needs to understand current visitors and their motivations to ensure its attractions, events and marketing have maximum appeal and set Portage apart from other nearby destinations targeting the same visitors. Though most operators in the Region don't keep hard visitor numbers, they have a strong anecdotal understanding of who visits and why. Allowing for overlap, these are the main visitor groupings:

Friends & family

Existing Portage connection. Visits are often driven by occasions like weddings and typically not counted as overnight hotel visitors if staying with family.

Independent sports visitors

Hunters, cyclists, bird watchers – attracted by distinctive offerings in the Region or new-to-them experiences such as trails. Generally, these visitors stay at a “base” but present opportunities for added activities (other recreation experiences, restaurants, shopping, museum visits, etc.).

Festivals/special interest

Event-driven visitors – to the Portage Ex or (in 2024) Manitoba Air Show or the Whoop and Hollar Folk Festival. This also includes subject/special interest-driven international visitation to the National Indigenous Residential School Museum of Canada.

Business visitors

To Roquette, McCain, Southport. This includes many international visitors who prize a quintessential prairie experience. Some stay for extended periods so opportunities abound to engage more with attractions, amenities, sports equipment rentals etc. Some are visiting to consider Portage as a place to re-locate or invest.

Families

Including regular, seasonal residents at cottages or seasonal campsites. This also includes day trippers to the beach, Splash Island, Fort la Reine.

Sports tournaments (especially hockey)

Event-driven vs. location driven. These visitors go to where the tournament is held, so reputation for hosting is key and wins bids. Teams tend to stay together in groups, so there is significant potential for impact with chosen hotels and restaurants. Accompanying families are another target, especially for add-on activities, shopping etc.

The role of attractions

The Region has a surprisingly diverse range of attractions for a location its size. However, their quality and effectiveness vary. Attractions range from strong (Stride Place's sports facilities, Splash Island, Prairie Fusion, Crescent Lake) to evolving with high potential (Southport, NIRSM, Delta Marsh). Others, such as Fort la Reine, are in need of upgrades.

These attractions all have potential to drive additional tourism but many have a lot of work to do to become market ready and to offer visitors a complete experience. This is acknowledged by operators and stakeholders, who are positive and optimistic about the future but frustrated by a lack of money, staff, and time to develop the programming and ideas they know will attract more visitors.

All stakeholders we spoke to are keen to collaborate with other businesses and other attractions to create joint programming, visitor itineraries and packages and to cross-promote each other's attractions. They see this as both increasing visitation and revenue for them and creating more compelling visitor offerings and experiences. The caveat is that they cannot do this

alone but would welcome a strong tourism department that could develop concepts, pull together participating organizations and promote these experiences.

An additional challenge is that Portage's attractions tend to be self-contained. Visitors typically visit one destination and not any others or any supporting assets like restaurants and shops. For example, school groups bussed to Fort la Reine often eat packed lunches outdoors on-site, then leave without going into the city itself. Hunters to Delta Beach – high-value visitors – rarely leave the hunting locations and cabins. Business visitors – even long stay – are not often inspired to try local restaurants or see local attractions.

Stakeholders (and residents via the community survey) also said that supporting assets like restaurants, interesting shopping and nightlife need to be improved. However, there is progress, including unique ethnic restaurants such as Taste of Spice, Om, Boun's Lao Street Eatery in Oakville and the Tiki Bar at St. Ambroise. Better information and promotion of these businesses would add options to the visitor experience and boost spending in the Region.

The role of events and festivals

Increasingly, visitors plan trips around occasions and specific events as opposed to a generic desire to visit a destination “someday”. Special events create a sense of excitement, something different from the everyday, outside many visitors’ experiences. Their limited duration prompts visitors to schedule and plan, which creates predictability for tourism operators. Events can generate additional impetus to shop, eat, drop into a museum and spend money.

The Portage Region has some strong events – national sports tournaments at Stride Place, the Portage Cup, the Manitoba Air Show (returning in 2024). All are successful, well managed and attract visitors from across Canada and the US. Most event organisers aim to provide information on Portage’s other attractions, although all admit this would be easier with some central information and marketing.

Portage also has events such the Portage Ex, the Portage Potato Festival and the Whoop & Hollar Folk Festival which draw visitors from outside the Region and beyond.

These have the added benefit of showcasing interesting visitor-appealing aspects of the character of the Region – such as agriculture and music – and provide visitors a chance to meet the locals. Unfortunately, these named events are all at risk as their volunteer base erodes and their long-time volunteer organisers retire.

A stronger central tourism office can create a planned and predictable calendar of Portage Region marquee events. For organisers, this will reduce scheduling conflicts, facilitate shared event resources such as volunteers, encourage collaboration and spin-off involvement of restaurants and shops and give Portage a clear, simple and differentiating visitor-attracting tourism “lineup” to market.



Portage’s tourism asset database counts 12 events and festivals. However, only three could be considered market ready – the Manitoba Air Show, the Portage Ex and the Whoop & Hollar Folk Festival.

The role of marketing initiatives

Portage has differentiating assets and characterful events which could showcase the Region and draw visitors if only they knew about them. Currently, even pre-disposed visitors must work hard to find out what's happening. This lack of awareness and key visitor information was mentioned frequently by stakeholders and seen as a key responsibility of a central tourism function. The Island on the Prairies site is not well known enough yet or high on SEOs. Even if potential visitors find the site, at the time of our interviews, its Events Calendar was not populated.

What not to do is create expensive and mass-market advertising promoting Portage as a destination having “something for everyone”. Instead, Portage’s marketing dollar will go further faster by promoting specific events that also promote Portage, around both scheduled and spontaneous visits from Winnipeg, Brandon and nearby towns.

This occasion and event-led promotion should be backed up with Portage visitors guides, both online and in print. This includes more targeted and themed communication pieces such as the recent (and much-praised) Eat Local and Shop Local postcards.

However, while visitors are the external target, there is an equally important internal marketing imperative. Not all residents are in favour of increased visitation. In some cases, specifically in the RM, there have been incidents such as visitors straying onto private property which have caused conflict. A strong central tourism function that consults, collaborates, coordinates events and ensures buy-in for product development in a manner that works for everyone would go a long way toward mitigating conflict and encouraging investment that works for residents and the Region as a whole.

“ Our reputation in Portage is a lot different from the reality. Tourism is a big part of changing that, part of changing our story.

“ People complain that there’s nothing to do. I think they just don’t know what there is to do. We’re not making it easy – or exciting.

The role of an enabling environment

Stakeholders are encouraged by a renewed sense of importance for tourism and the central tourism office pilot project, although there is some concern that inconsistent levels of funding could stall progress.

Stakeholders stressed the importance of the City and the RM working together on programming, events and promotions. There is strong support for co-ordination, collaboration and joint initiatives that will be mindful of residents' wishes across the Region while showcasing the quality of life of the Region as a whole and creating more opportunities for better visitor experiences. This is especially the case because so many of the differentiating tourism assets are in the RM (two beaches, two hotels, two museums, Delta Marsh) while most of the supporting infrastructure – the restaurants and shops – are in the City.

In a practical sense, there is universal support for a central tourism function that curates and develops tourism products and experiences as well as promotes them. Much of the need is foundational, backroom work – creating a central events calendar to avoid scheduling conflicts, creating visitor communication online and offline, helping operators upgrade their websites and booking sites, building relationships and buy-in. Also, a tourism function that includes a wide range of stakeholders in development can create new initiatives, partnerships, packaging, use of new formats and generally a better, more visitor-appealing tourism industry.

“ It's unique in Portage. We're all doing our own thing, and we don't talk to each other. We need something that brings us together, co-ordinates tourism.

The Competition

In this chapter, we look at what other communities are doing to boost visitation, how Portage stacks up and lessons Portage can learn.



How does Portage stack up?

As discussed, the Portage Region has a surprisingly diverse range of attractions for its size. This alone, if well exploited, provides a competitive edge. Improving the current attractions, creating an occasion and event-driven tourism calendar and effective, creative and targeted marketing can make the difference.

So – what locations does Portage compete with? If a visitor were to choose between Portage and other nearby and somewhat similar locations, how would Portage stack up? Even before the pandemic, three-quarters of Portage’s visitors were Manitobans – mostly from Winnipeg or Brandon. So, we have compared Portage’s tourism appeal to three Manitoba locations – Gimli, Morden and Neepawa.

These three are all close to Winnipeg and could be considered both as day-trip or weekend destinations. All three have some of the same characteristics and structure as Portage – town/city amenities with additional assets in the outlying rural area. All three also face the same challenges as Portage – how to maximise attractions, how to use events as

tourism drivers, how to create more effective marketing and how to bring the community along with tourism development. Finally, in recent years, all three have upped their game and improved their appeal to visitors. Portage can learn lessons from their experiences.

However, these three locations need not be viewed as direct competitors. Today’s visitors want to try different things at different times, see different places, and have a range of local experiences. It’s a matter of “and” (Portage this time, and Gimli next time, etc.) instead of “or” (Portage or/instead of some other destination).

Instead, the concern is standards. Visitors have increasingly high standards for a complete and seamless visitor experience – so, an attraction or event plus great accommodations, good food and drink, easy booking, a few unique, often independent shops. To be competitive, Portage must ensure all these aspects are up to local, national and international standards.

Competitor case study: Gimli

Gimli is a classic Manitoba summer beach town with a growing permanent population. Long a summer resort, it is now developing assets and activities for locals and visitors, particularly in winter by expanding its ice-fishing infrastructure.

Gimli also has well-developed visitor infrastructure – including lodgings, restaurants, a centrally located beach which offers sports equipment rentals. This is further supported by amenities geared to residents as much as to visitors and cottage owners throughout the Interlake – big box stores and so on. Gimli has encouraged small, independent, often family-owned shops and restaurants. It has a year-round music and arts scene with an arts club and gallery as well as a music-oriented pub. This has given the town a unique character and drives significant revenue, particularly in the summer season and increasingly throughout the year. While Gimli plans to upgrade some of its amenities, it will do so while maintaining the historic charm that adds to the town's character and personality.

Gimli has proved that strong, scheduled events drive visitation and spending. Its two marquee summer events, the Gimli Film Festival and the Icelandic Festival of Manitoba, are both professionally run with paid staff. In recent years, an experienced recreation director has initiated successful year-round events for locals and visitors (pickleball tournaments, etc.). Attractive yet practical marketing and visitor materials concentrate on building awareness of events (dates, details, where to stay, etc.) versus selling Gimli overall. Gimli also effectively uses social media.

What lessons can Portage learn from Gimli?

- Importance of well-managed events as visitor drivers
- Importance of interesting, independent retail, food, culture to build a unique character
- It doesn't happen overnight (the film festival started in 2001)
- Build for locals, and the visitors will join in
- Importance of strong, coordinated tourism office with staff
- Having the right, high-quality infrastructure to support visitation

Competitor case study: Morden

Morden has two tourism boulders – the Corn & Apple Festival, Manitoba’s largest street festival, and the Canadian Fossil Discovery Centre, currently planning an expansion.

Over the last few years, Morden has made significant investment in its outdoor experiences based around its central Lake Minnewasta. Morden’s aim is to ensure people can just turn up and play, so it has invested in equipment rentals and encouraged further rentals at local sports stores. Morden has also leveraged its historic downtown and several character venues to develop a wedding industry which boomed during the pandemic. Now well-established, this boosts visitation and helped create businesses catering to the wedding market including clothing, health and beauty, restaurants and a family-run microbrewery.

Tourism is managed as a partnership between Morden, Winkler and the RM of Stanley. Assets vary across the area with most of the visitor-attracting assets in Morden while the large, good-quality hotels are in Winkler. There are plans for unique-stay options such as yurts across the area including in the RM.

Morden benefits from strong, creative marketing. It is very visitor-focused. Good collaboration among operators allows for partnerships and packaging – the best local B&B provides a discount for ziplining, for example. There is also good targeting of Winkler’s business visitors to Morden’s visitor assets, as well as courting film production companies as locations for Hallmark films.

What lessons can Portage learn from Morden?

- Think like a visitor – what do they need and want? – even before they think of it
- Collaboration, such as coupons for other local amenities
- Opportunities for non-tourism businesses that drive occasion visitation, such as Morden’s wedding businesses
- Consider interesting accommodations near central lakes – yurts, tiny cabins – which will also be Instagrammable
- Tourism can be developed jointly with neighbouring municipalities, even with different asset types in each
- Encourage unique retail with visitor appeal, especially in the town centre

Competitor case study: Neepawa

Neepawa, though often voted Manitoba's prettiest town, was not a tourist destination. Located on the Yellowhead Highway, it is often a drive-through for travellers en route to Riding Mountain National Park. Its legacy tourism assets were fading due to volunteer burnout, retirements, the pandemic and a general lack of investment. However, when Neepawa's economy improved with the expansion of the HyLife pork processing plant, the community partnered with its now-largest employer to develop the HyLife Back Forty, an all-season, 40-acre, accessible trail system for all ages and all skills. This has both benefitted the community and gained prominence within extreme sports circles, attracting national visitors.

Neepawa's economic success is due to proactive and collaborative economic development efforts. The town courted a new hotel and a new hospital – and got both. To encourage community involvement and buy-in, particularly from the business community, Neepawa created an option for Chamber of Commerce members to join the tourism committee when they renewed their Chamber membership. Take-up was high, which has bolstered business support for tourism.

Neepawa also created a welcoming environment for its growing Filipino population, most of which was recruited by HyLife. The Filipino festival and local shops both serve the growing newcomer population and attract visitors from the larger Filipino community in Winnipeg.

With a small budget and staff, Neepawa makes good use of targeted marketing, including in sports and Filipino media, and encourages repeat visitors with compelling offers and messaging.

What lessons can Portage learn from Neepawa?

- Be proactive. Target and go after the type of amenities, including retail and events, you want.
- Not only welcome but involve your newcomers. They help add differentiation to your town and their friends will visit.
- Get on the niche sports circuit. Junk Yard Dogs attracts some of the same cyclists who visit the HyLife Back Forty.
- Consider expanding the wider tourism group to include non-tourism businesses.
- Target visitation. Match your assets with special interest visitors who will appreciate niche assets.

Recommendations

In this chapter, we bring together some recommendations to help Portage achieve its tourism goals, to grow its tourism and to measure and track this growth.



Approach to recommendations

The PRTC's 2021-2026 Strategy says the Region's tourism vision is:

“To be recognized as one of Manitoba's most desirable tourist locations”.

This vision is ambitious and achievable. The next step is to make it more specific and make it a perfect fit for Portage – aligned not only with Portage's economic development goals and that of its tourism stakeholders but also aligned with the Region's overall community ambitions.

Tourism can be a powerful force both as an economic driver and as a tool in strengthening the Portage brand. Visitors who have a positive experience have potential to drive revenue – by staying longer, returning, spending more while visiting – and telling their friends! On a larger scale, good visitor experiences are a key part of highlighting the Region's personality and quality of life. Tourism has a key role in promoting the Region as not only a good place to visit but to live, to work, to invest. Tourism can be a key part of crafting the narrative and of showcasing what is best about the Region, why people live here, why they love it, why you can too.

Critical, however, is for Portage to focus and manage these opportunities. To do so, Portage must leverage its existing assets to create a narrative that differentiates and inspires both visitors and locals who can be encouraged to play tourist in their own region and support attractions and events. This also includes upgrading the basic infrastructure that supports tourism such as restaurants, shops and signage as well as strengthening the enabling environment that helps to plan, foster and market its tourism. In the following pages we summarize:

- Guiding strategies and barriers to developing Portage tourism
- Lead opportunities in the PRTC's four goal areas
- Strategic recommendations to enhance competitiveness and attract visitors
- Some immediate steps to get started in 2024

Strategies to develop Portage tourism

Leverage existing, differentiating assets. Use what you have. Maximize the value of your current differentiating assets like Crescent Lake and the Island and unique attractions such as NIRSM. Invest in making these better and competitively market-ready first before developing new assets.

Become occasion-driven vs. destination-driven. Use events as specific occasions to create definite and scheduled reasons to visit. Move visitor motivation from “might visit Portage some day” to “must visit Portage when that event is on”. Leverage existing and particularly multi-day events to encourage overnight stays. Amp them up with additional collaborators. Create media buzz around them.

- **Example:** Specific scheduled events vs. general exhibits at museums, packages and promotions to extend visitor stays at the Manitoba Air Show, the Portage Ex, etc.

Target. Don't mass market. Target visitors whose specific interests align with your assets (e.g., cyclists who would find Junk Yard Dogs worth a visit). Avoid mass marketing the location or using a “something for everyone” pitch.

Develop a visitor mindset. What will enhance a visitor's experience, especially those with time to stay and opportunities to spend? What will help visitors plan and book?

- **Example:** Additional canoe and kayak rentals at Crescent Lake, local food pop-ups/food trucks at museums, coupons and discounts for local attractions, specific interest guides such as walking tours of historic homes.
- **Example:** Accurate information on all operator websites, easy booking mechanics, schedules for events and attractions.

Create tourism as a permanent function or department.

Extend the pilot to ensure a one-stop shop that creates a central calendar of events, provides up-to-date visitor information, curates packages and promotions and directs visitors to individual sites and operators to book.

- Use this department to bring operators together to collaborate, develop ideas, cross-promote, and allow for shared resources.
- Continue to grow an engaging social media presence.

Barriers to overcome

Money is tight

- A problem for everyone which means that tourism is not generally a priority (for visitors, for municipalities, for sponsors).
- But good value – packages and promotions – will appeal.

Funding is unpredictable and inconsistent

- Impacts efforts to develop and promote tourism.
- Especially negatively impacts long-range planning, investments in upgrades etc.

Volunteers are retiring

- Retirements and burnout puts some of Portage's legacy events at risk, such as the Portage Ex and the Potato Festival.
- But if sufficiently interesting and not a “forever commitment” volunteer opportunities can appeal to community members
 - **Example:** this year's Junior A Hockey tournament

Visitor-focused training and skills are lacking

- Visitors expect increasingly high standards. To remain competitive, operators need to constantly improve customer service training and skills such as social media marketing.
- The central tourism function could organize up-skilling opportunities at rates operators can afford.

Fear of over-tourism

- Some fear that tourism will destroy Portage's charm as a small, rural city. This fear and resulting opposition to tourism constitutes a barrier.
- Reframing tourism by focusing not on tourism as an industry but on welcoming visitors to certain things and at certain times in a collaborative and managed fashion would be a way to showcase Portage in its best light and increase revenue while appealing to visitors and respecting community wishes.

Portage has what visitors want

Visits with Purpose



What visitors want

- Learning something new
- Doing something meaningful

What Portage has

- Moving toward reconciliation while learning beading at NIRSM
- Trying out new sports like fat-biking at Junk Yard Dogs

Accessible Wilderness



What visitors want

- Nature and outdoors but not too remote
- All levels, and multi-generational
- All skills, including for people with disabilities

What Portage has

- Camping beside stunning beaches but close to city amenities (and with a Tiki bar)
- Watching bird migration at Delta Marsh and St. Ambroise and even in the middle of the city on Crescent Lake

Localism



What visitors want

- Meeting and learning from locals
- Local life, unique food and drink
- Sense of welcome and being an authentic part of a community (if only for a short time)

What Portage has

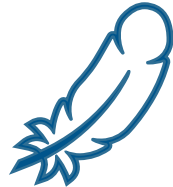
- Local food and farming festivals such as Portage Ex, Potato Festival
- Visiting a farm at Farm Away Retreat

Lead opportunities

While Portage has a range of opportunities to develop tourism, four segments stand out as lead opportunities:



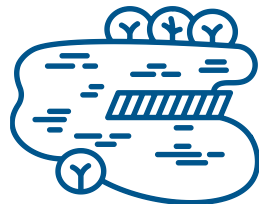
Sports tourism



Indigenous tourism



Agritourism



Ecotourism

Several factors make these particularly relevant and practical for Portage:

- They align with the PRTC's development goal as identified in its strategic plan
- They have scope for both immediate action and longer-term development
- They have existing traction in Portage
 - Assets (even if not yet fully developed)
 - Operators with relevant expertise or experience
- All are recognized global tourism segments with successful examples and with credible professional associations (such as Sports Tourism Canada) which can support development with learning, advice and connections.

Lead opportunity: Sports tourism

Opportunity

According to Sports Tourism Canada, sports tourism is now the fastest growing segment of the tourism industry. This includes tournaments that attract large visitor numbers for multiple days and use supporting assets (accommodations, restaurants). It also includes individuals who collect sports experiences, such as visiting every cycle adventure park in an area. Portage already has a strong reputation for organizing and hosting tournaments, particularly hockey. It also has an international reputation in hunting and attracts high-value, often repeat visitors. The challenge is to inspire those visitors to venture out from their base venue (rink or hunting lodge) and spend more in the community.

Leveraging the opportunity

- Use the existing success and hosting know-how of hockey tournaments such as the annual Portage Cup and hunting expeditions such as at St. Ambroise to create a comprehensive sports tourism strategy.

This strategy could include targeted outreach to teams and with packages and promotions to attractions and amenities during the tournament, and awareness-building to other hunters through the hunt/fish media.

- Once hunting and tournaments begin to pay dividends, similar strategies could be used for other sports, such as curling and cycling.

Low-hanging fruit

- Leverage the Portage Cup (slated for March 2024) as the initial sports tourism pilot project. Explore opportunities to amplify the tourism potential of the event with hockey-themed promotions and offers at other attractions.
- Explore collaboration and cross-promotion with arts and music in the arena.

Longer-term goals

- Create targeted communications and PR around other sports – such as cycling at Junk Yard Dogs and the new Adventure Park (when completed).

Lead opportunity: Indigenous tourism

Opportunity

Portage is on the traditional lands of some of the province's most entrepreneurial and innovative First Nations, including Long Plain. In fact, two of the Region's best assets – the new Microtel hotel and the National Indigenous Residential School Museum – are on First Nations land. Visitors are very interested in authentic Indigenous experiences, so Portage has genuine opportunities here, particularly NIRSM and the new Indigenous exhibits at Fort la Reine. Additionally, the Arrowhead Games, following a successful pilot, has plans to become an annual event combining the family-friendly aspects of sports tournaments with the differentiation of Indigenous sports.

Leveraging the opportunity

The “how” must be Indigenous-led by operators including NIRSM and the Arrowhead Development Corporation along with Indigenous Tourism Manitoba and the PRTC.

Low-hanging fruit

- Work with the 2024 Arrowhead Games to amplify its impact, awareness and reach.
- Host mini-demonstrations of the Indigenous sports in public places – Saskatchewan Avenue, around Crescent Lake, at campgrounds, at Southport – as examples of the sports themselves. This can raise local awareness, preview the games themselves and add to the media coverage of the event.

Longer-term goals

- Support Indigenous tourism operators and organisations in exploring the creation of cultural camps at NIRSM and elsewhere in the Region for visitors to learn about Indigenous culture including food, sports, games and crafts.

Lead opportunity: Agritourism

Opportunity

As a thriving agricultural centre, Portage could benefit both economically and in terms of positioning by tapping into the global visitor interest in agritourism. However not all aspects of agritourism are practical or make business sense. Farm-located initiatives face increasing barriers including insurance costs, health and safety regulations for facilities and activities, availability and cost of staffing and possible disruption to their core business. Could Portage instead create an agritourism strategy on a municipal level that could reduce some barriers and drive incremental visitation and revenue while supporting Portage's position as an agricultural hub?

Leveraging the opportunity

- Re-imagine Portage's agricultural fairs, markets and farm shops to make them more compelling and lucrative visitor propositions.
- Create a Portage Farmers Market Guide with maps (online and offline, plus signage) to the farmers markets and seasonal farm shops.

Low-hanging fruit

- Work with the Portage Ex to reimagine the livestock section as a wider agrifood exhibit. Encourage additional vendors and attractions that amplify the theme.
- Upweight on-trend food (such as pop-up restaurants) and non-food attractions (such as rural crafts and culture). Showcase to visitors, including business visitors and investors, not only agriculture but specifically the products made in Portage (e.g., farmers markets collaborating with the protein processors to create a must-attend market that also promotes the benefits of pea protein).

Longer-term goals

- Work with farmers to create an annual weekend event around Portage's farm network. Develop dedicated marketing material and visitor information including maps, vendor profiles, promotions, samples, cultural add-ons etc. If farmer-led and supported by Portage tourism, it could be a visitor attraction and a benefit to farmers while sharing event resources among vendors.

Lead opportunity: Ecotourism

Opportunity

Ecotourism is a huge global travel trend and a natural fit for the Portage Region, which has significant wetlands and waterfowl eco-assets ranging from the urban ecosystem around Crescent Lake to the wilderness areas of Delta Marsh. Could these be responsibly and sustainably developed – and importantly, not over-developed – to enhance their value as an eco-tourism destination?

Leveraging the opportunity

Portage can develop its nature-oriented assets into a full ecotourism strategy. Interpretive signage already exists around the Crescent Lake Walking Trail and at Delta Marsh. While this could be expanded in these locations and elsewhere in the Region (such as St. Ambroise and at various campgrounds), there are also opportunities to create eco-activities such as canoeing through the Marsh, counting waterfowl migration, taking a curated nature walk on the Island, photography walks and in time, science-based education.

Low-hanging fruit

- Work with the high school to develop a family adventure self-directed eco-savenger hunt-type game/app based on the Crescent Lake Walking Trail Interpretive signage. Challenge all ages and add a social media contest element featuring prizes connected to Portage attractions and retail.

Longer-term goals

- Convene an experts' group to begin to explore the feasibility of developing responsible visitation possibilities at Delta Marsh.
- Consider citizen-scientist opportunities – especially linked to wetlands and waterfowl. Avoid mass-tourism ideas.

Recommendations: Summary

Focus on a limited number of specific tourism segments

- Sports tourism: Create a tournament-related strategy to market additional experiences and assets to participants.
- Indigenous tourism: Support the Arrowhead Games and the NIRSM to amplify their awareness and reach.
- Agritourism: Leverage the Portage Ex, the Region's farmers market and, longer-term, farmer-led, food-related experiences.
- Ecotourism: Focus on experience development around Crescent Lake and Delta Marsh.

Become occasion-driven vs. destination driven

- Promote specific events vs. simply Portage or the assets overall. Organized, scheduled, limited-duration events prompt planning and scheduling vs. "I'll get around to visiting sometime".
- Create a central events calendar for both planning and promotion.

Expand the tourism community and bring it together

- They want to collaborate but need a format and plan, and an office (with physical space) that organizes, coordinates and markets their efforts.
- Expand the tourism community to include the larger business community including non-tourism businesses.

Build on the current pilot to create, fund and staff a central tourism function for the Region

- Critical to sustaining tourism, operator initiatives and collaboration, public buy-in and consistent funding.
- Also critical to ongoing data collection.

Coordinate and collect visitor data (to show impact)

- Create operator buy-in for the Portage Model and its data collection process.
- Create a portal for operators to easily share data annually (hotels/campgrounds first, and later attractions with day trippers).
- Update the visitor impact assessment model (2-3 years).
- Capture visitor details to create a database to allow Portage to target to repeat visitors with promotions and incentives to visit.

Immediate next steps for 2024

Market

- Leverage four already-planned events in 2024 in the four lead opportunity areas to drive visitation and support Portage's story:
 - Portage Cup (March)
 - Portage Ex (July)
 - Manitoba Air Show (August)
 - Arrowhead Games (TBD)
 - Support events in other areas as resources allow (Potato Festival, Whoop and Hollar Folk Festival)
- Work with organizers to create:
 - Targeted outreach to interest groups
 - Media plan
 - PR plan, including "previewing" events across the Region (downtown, at campgrounds, on signage, etc.)
 - Cross-promotion opportunities with other tourism assets

Build

- Tourism function/department with additional staff (continue with one full-time tourism staffer and add at least one part time/summer student)
- Create a central events calendar
- Create additional opportunities for all the Region's tourism operators to gather, network and collaborate, over and above the PRTC's regular meetings
- Create and deploy a Visitors Guide
 - Begin with online, especially events listings and visiting/booking information
 - If budget allows, consider some print and ensure copies are available at hotels, restaurants, Stride Place, etc.

Gather

- Leverage the Portage Model to create a data collection process and online form that allows the Region's hotels and campgrounds to share occupancy data annually confidentially (including with STR)
- Encourage/support key museum and recreational assets to begin tracking day-trip visitors
 - Includes collecting postal codes or visitor origin data or setting up online ticketing processes
 - Includes emails to re-contact potential repeat visitors
- Consider the timing to update the economic impact calculations – every year? Bi-annually?
- Consider sharing the economic impact model with other jurisdictions to support local tourism benchmarking

Appendix A: Stakeholder Engagement

Who we spoke with for this project.

Stakeholder consultations

Insights were gathered from 35 stakeholders via interviews, site visits and general conversations. We are extremely grateful for the time and ideas the following people shared, and their commitment to Portage's tourism development.

Kameron Blight, RM of Portage la Prairie
Corey Braaksma, Creekside Camping & RV Park
Cody Buhler, Portage Terriers
Madison Connolly, Southport Aerospace Centre
Lorraine Daniels, National Indigenous Residential School Museum
Sterling Ducharme, St. Ambroise Beach
Stefanie Dunn, Portage la Prairie & District Chamber of Commerce
Emma Ens-Maclver, Fort la Reine Museum
Kelly Funk, Portage Cup
Guy Gauthier, CN Railway Museum
Blair Geisel, Junk Yard Dogs Cycling Club
Todd Goranson, Industry Development Branch, Agriculture Manitoba
Gordon Goldsborough, University of Manitoba
Scott Greenlay, Delta Beach Association
Kyle Hamilton, RM of Portage la Prairie
Autumn Hunter, Canad Inns Destination Centre Portage la Prairie
Bob Jones, CN Railway Museum
Lorna Knight, Prairie Fusion Arts and Entertainment

James Kostuchuk, Portage Heritage Committee
Sharilyn Knox, City of Portage la Prairie
Peggy May, Southport Aerospace Centre
Cindy McDonald, Southport Aerospace Centre & Potato Festival
Tom McCartney, CN Railway Museum
Michaela MacKenzie, Roquette Canada
Guy Moffat, Portage la Prairie & District Chamber of Commerce
Shyam Moorthi, Industry Development Branch, Manitoba Agriculture
Terry Myran, Arrowhead Development Corporation
Linda Omichinski, Whoop & Hollar Folk Festival
Nathan Peto, City of Portage la Prairie
Morgan Peters, McCain Foods Canada
Angie Shindle, Stride Place/PRRA
Katlyn Richaud, Portage Industrial Exhibition
Tracy Wood, Farm Away Retreat
Josh Wright, Whoop & Hollar Folk Festival
Robin Young, Food Development Centre

Appendix B: Community Survey

Detailed results of the community engagement survey.

Profile of respondents and methodology

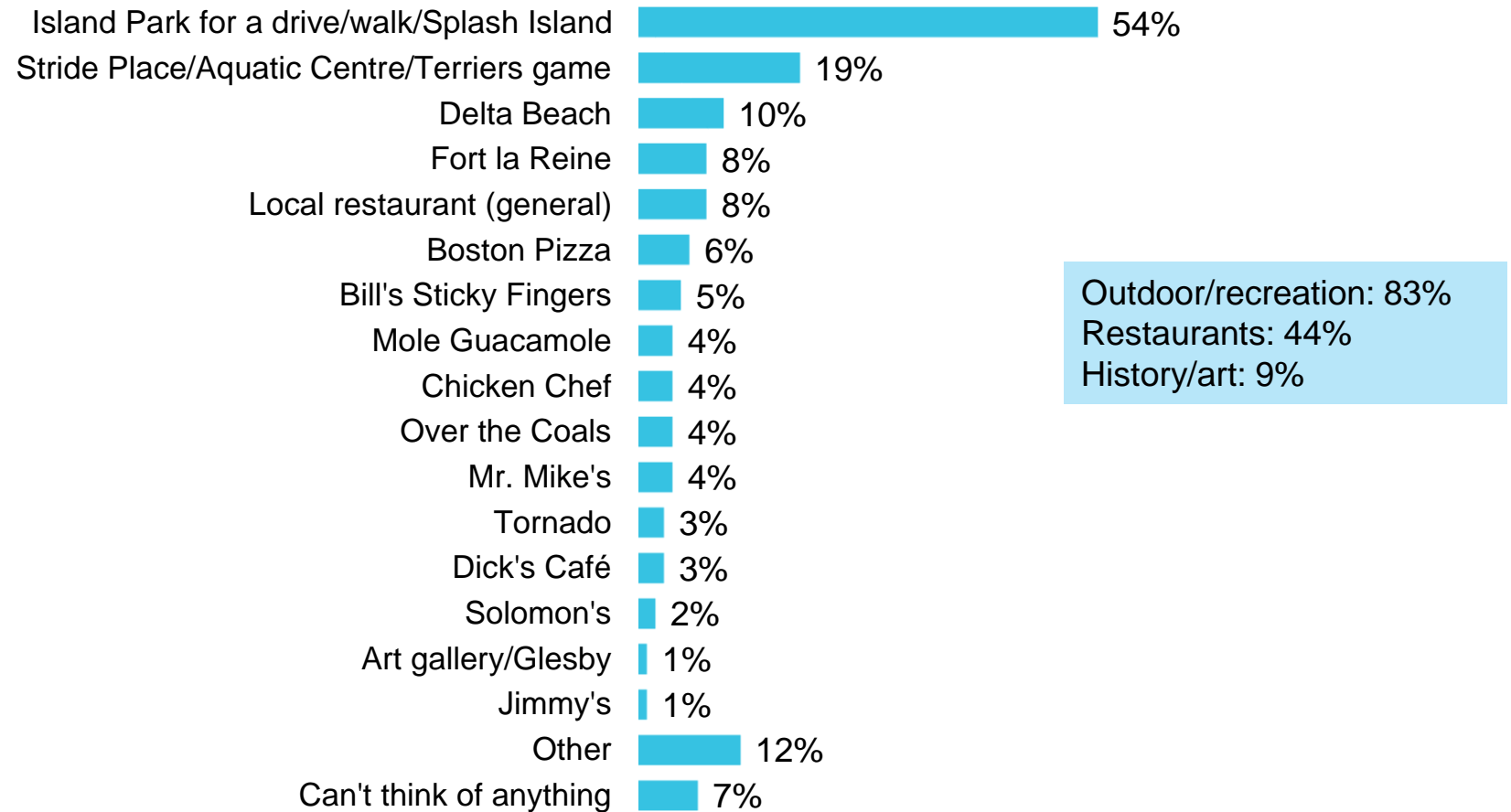
- Survey questions designed in collaboration with PRED and the project team to engage residents in the tourism discussion and to uncover any additional assets or unique strengths in the Region.
- Survey in field starting Oct. 31, 2023 for three weeks. The link to the community survey was shared on social media and amplified by members of the PRTC.
- All data analysis and coding of open-ended responses done by Probe using SPSS software.
- No margin of error can be applied to this survey because it was not a random or representative poll of all adults in the Region. Indeed, the sample skews heavily female. However, given the sample size of N=380, a random and representative survey of this size would carry a margin of error of +/-5.4%, 19 times out of 20.

(Unweighted)	Total (N=380) (%)	Portage la Prairie (n=217) (%)	The RM of Portage la Prairie (n=87) (%)	Outside the Region (n=76) (%)
Gender				
Male	16	16	15	18
Female	83	84	84	82
Age				
18-34	19	20	18	14
35-54	46	44	47	49
55-60	13	12	10	17
60+	23	24	24	20

Portage's Top Attractions and Hidden Gems

Island Park, Stride Place and various restaurants top the list of places residents take visitors

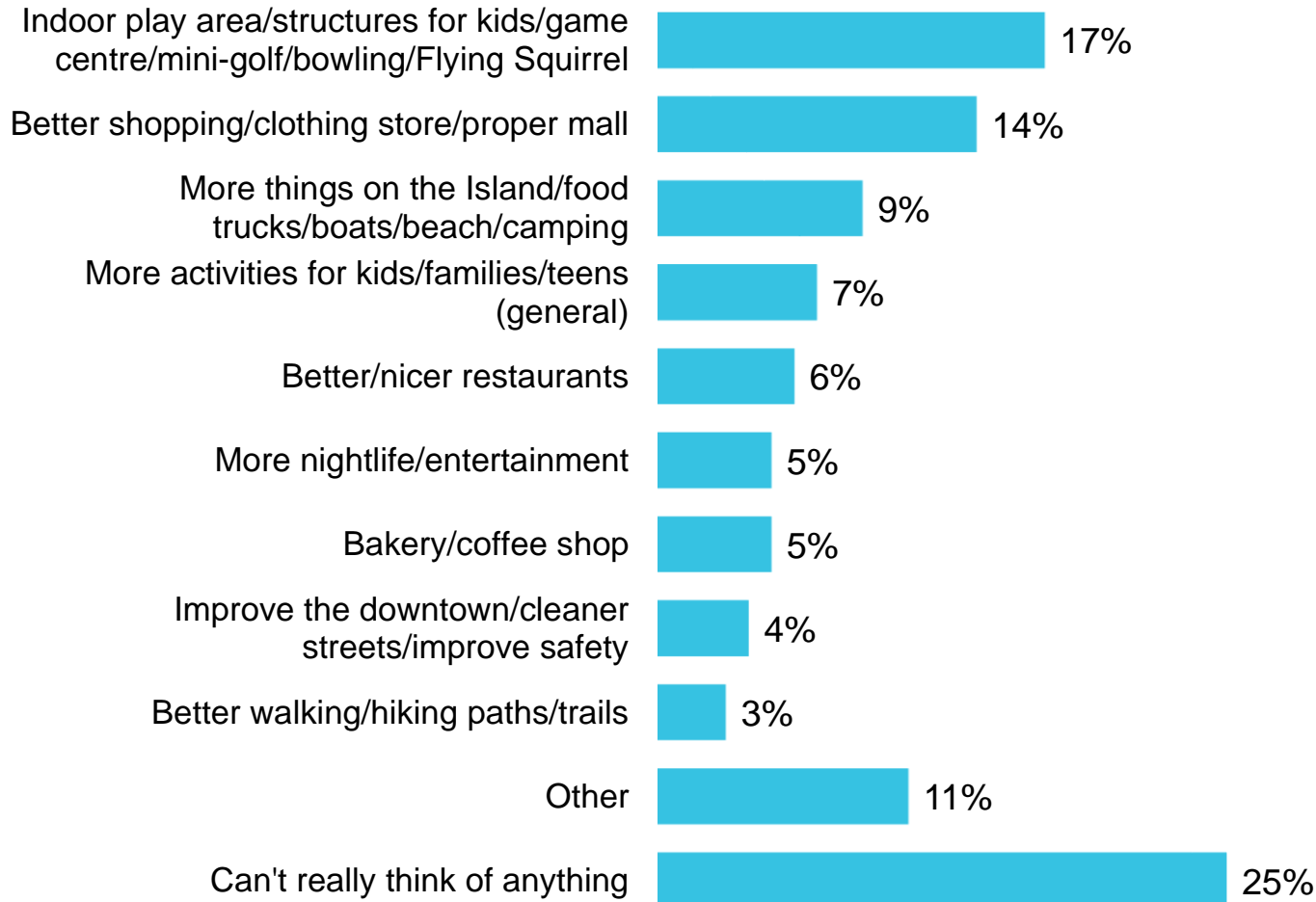
Q1. When family and friends visit Portage – the City and the RM – where do you take them? (Could be a restaurant, shop, museum, park, attraction – a hidden gem or something well-known.) Base: All respondents N=380



Ideas for Product Development

Attractions for families, especially indoors, along with better shopping and eating top the wish list

Q3. What is one thing you wish visitors could do or experience in Portage? What is the area missing that could appeal to visitors? (Base: All respondents N=380)



“ It would be nice if there was more fun things to do, escape rooms, bowling, laser tag, arcades. Something both children and adults can part take in and have fun with!

“ A shopping mall. Shopping local is always encouraged but where does one buy clothes. It's very limited here.

“ Pedal boats for Crescent Lake. Canoes & kayaks are a great addition but pedal boats for young kids would be great.

“ More good restaurants (no more pizza or chicken places) and a nice coffee shop/bakery.

“ A place to go and dance and have a couple drinks where you feel safe.

“ A non-chain coffee shop that focuses on good baking and lattes.

“ The core area of town has become less safe and less attractive. Our downtown is receiving a make-over, but it is not safe to take a stroll. Especially after dark.

Appendix C: Regional Tourism Asset Database

A listing of all current tourism assets in the Region and an estimate of their market readiness.

Tourism assets

Outdoor recreation and camping	Market readiness
Corn Maze at Fort la Reine	Doors open
Creekside Camping & RV Park	Visitor ready
Delta Beach (and camping)	Visitor ready
Delta Marsh Wildlife Management Area	Doors open
Island Park	Visitor ready
Miller's Camping Resort	Visitor ready
Ofty's Riverside Campground	Visitor ready
Portage Flying Club	Doors open
Portage Golf Club	Visitor ready
Portage Industrial Exhibition Campground	Visitor ready
Portage Junk Yard Dogs	Visitor ready
Rock Road ATV Park	Doors open
Portage Snowmobile Trails	Doors open
St. Ambroise Beach	Visitor ready
Simplot Central Park Splash Pad & Rotary Skate Park	Doors open
Skating on the Crescent	Visitor ready
Southport Golf Course	Visitor ready
Splash Island Waterpark	Visitor ready

Market Readiness Definitions

Doors open: An experience is available if a visitor knows where to look.

Visitor ready: An operator is fully permitted and licensed, has a basic Facebook page or other web presence, has consistent hours and contact info, does some basic local marketing.

Market ready: An operator actively markets and can take advanced bookings with published prices and cancellation policies, offers visitors details about what they can see and do, has some specialized training or certification and builds partnerships.

Export ready: An operator is able to market to and through the travel trade's distribution sales channels using a commission structure and guaranteed advanced pricing, works with destination marketing organizations to welcome international visitors with very high-quality marketing materials, experiences can be tailored to specific visitors (language, etc.)

Tourism assets (cont'd)

Indoor recreation	Market readiness
BDO Centre	Visitor ready
Central Plains RecPlex	Visitor ready
Portage Cup	Visitor ready
Portage Terriers	Visitor ready
Stride Place	Market ready
Community-wide events & festivals	Market readiness
East End Market	Doors open
Farmers Market	Doors open
Made in Manitoba Expo	Visitor Ready
Manitoba Airshow	Market ready
Portage Industrial Exhibition	Market ready
Portage Potato Festival	Visitor ready
Prairie Fusion Night Market	Visitor Ready
Rotary Pond Hockey Championship	Doors open
Rotary Santa Parade of Lights	Doors open
United Way Shopping Night	Doors open
Whoop & Hollar Folk Festival	Market ready
Winterfest	Doors open

Tourism assets (cont'd)

Hotels & accommodations	Market readiness
Barker Suites	Market ready
Canad Inns Destination Centre	Market ready
Days Inn by Wyndham	Market ready
Farm Away Retreat	Market ready
Hi-Way Motel	Visitor ready
Microtel Inn and Suites	Market ready
Midtown Motor Inn	Doors open
Mynarski House	Visitor ready
Sunset Motel	Doors open
Super 8 by Wyndham	Visitor ready
Westgate Inn	Visitor ready
Yellowquill Motel	Doors open
Restaurants & bars	Market readiness
A&W	Market ready
Bar Burrito	Visitor ready
Benvenuto Pizzeria	Visitor ready
Bill's Sticky Fingers	Visitor ready
Boston Pizza	Market ready
Boun's Lao Street Eatery	Doors open
Chicken Chef	Visitor ready
Dairy Queen	Visitor ready
Dick's Cafe	Visitor ready
Domino's Pizza	Market ready

Tourism assets (cont'd)

Restaurants & bars (cont'd)	Market readiness
George's Burgers and Subs	Doors open
Great Wall Chinese Restaurant	Doors open
Jimmy's Submarine & Dairy Delight	Doors open
Lake Shore Restaurant & Bar	Doors open
Lita's Station	Doors open
Little Caesars	Visitor ready
Little Spruce Cafe	Visitor ready
Mary Brown's	Visitor ready
May Mei Chen's Chinese Restaurant	Doors open
McDonald's	Market ready
Mole Guacamole	Visitor ready
Mr. Mike's Steakhouse Casual	Visitor ready
Om Indian Cuisine	Visitor ready
Oriental Pearl	Doors open
Over the Coals	Visitor ready
Pizza Hotline	Visitor ready
Pizza Hut	Visitor ready
Popeye's Louisiana Kitchen	Visitor ready
Prairie Donair	Visitor ready
Subway	Visitor ready
Taste of Spice	Visitor ready
Tavern United	Visitor ready
Tim Horton's	Market ready
Tornado's Restaurant & Lounge	Visitor ready
What's the Scoop	Visitor ready

Tourism Assets (cont'd)

Arts & entertainment	Market readiness
Prairie City Cinema	Doors open
Prairie Fusion Arts & Entertainment at William Glesby Centre	Market ready
Indigenous tourism	Market readiness
Arrowhead Games	Doors open
Four Winds Cultural Centre – Southport	Doors open
Keesh Conference & Gaming Centre	Visitor ready
National Indigenous Residential School Museum	Visitor ready
Shopping	Market readiness
3's Company Boutique	Visitor ready
Connery's Berry Farm	Visitor ready
GME Thrift Emporium	Doors open
Jeffries Berry Patch	Visitor ready
Mil-Jeanne Flowers & Axcenz	Doors open
Portage MCC Thrift Shop	Doors open
Portage MCC Furniture Plus	Doors open
Our Farm Greenhouses	Doors open
Riverbend Orchards	Visitor ready
Solomon's Home Garden Gift	Visitor ready
The Little Red Barn	Visitor ready
Vintage Heather's Antiques	Doors open

Tourism assets (cont'd)

Roadside attractions	Market readiness
Dutch-style Windmill	Doors open
Golden Eagle at Keeshkeemaquah	Doors open
Great Grey Owl statue	Doors open
Royal Canadian Airforce Silver Star	Doors open
World's Largest Coca-Cola can	Doors open
Heritage & historic destinations	Market readiness
Canadian Pacific Railway Heritage Park & Interpretive Centre	Visitor ready
Fort la Reine Museum	Market ready
Heritage Walking Path	Doors open
Manitoba Softball Hall of Fame and Museum	Visitor ready

Appendix D: Detailed Economic Impact Model

Detailed results and estimates used to create the impact figures, and how the model can be replicated in future.

GEORGETOWN NEWBURY GROUP

Impact Assessment Highlights

The Georgetown Newbury Group (GNG) developed an economic and tax revenue impact assessment for the expenditures of visitors to the city and rural municipality of Portage la Prairie during the period Sept. 1, 2022 to Aug. 31, 2023. This impact assessment was undertaken as part of the Tourism Economic Impact Assessment for the Region of Portage la Prairie working with Sinclair Barnes Limited and Probe Research Inc.

The GNG Manitoba-level impact assessment was developed for three separate groups:

- Hotel and motel guests
- Seasonal campers
- Overnight campers

Several conservative key assumptions (e.g. room capacity, occupancy rates, room rates, daily consumer spending) were required due to a lack of necessary data from visitors and operators.

It should be noted that the GNG impact results cannot provide a complete or absolute measure of the impact of direct expenditures of visitors to the Portage la Prairie Region. Therefore, the presented economic and tax revenue impacts should be treated as general estimates only and never as absolutes.

Impact Assessment Highlights (cont'd)

Highlights of the total economic and tax revenue impacts include:

- Daily, there were an average of 572 occupied accommodation units. Seasonal campers represented 55% of the occupied accommodation units, followed by hotels and motels at 30%.
- Total visitor person days in the Portage la Prairie area are estimated at 302,265 days. This was influenced by the average number of persons in the visitor parties for the various visitor groups. For hotel and motel rooms, it was two persons per room, while for the seasonal and overnight campsites, the average party size was 3.5 persons.
- Hotel and motel visitors accounted for 63.2% of the overall person days. Far behind were the campers. Seasonal campers accounted for 27.4%, while overnight campers were at 10.3%.
- Hotel and motel visitors' average daily spending of \$186 was driven by the room rate. Only an estimated \$73 in daily spending was for non-accommodation expenditures. In comparison, seasonal campers and overnight campers spent approximately \$50 and \$33 respectively on non-accommodation expenditures.
- Total expenditures of \$25.5 million is dominated by hotel and motel visitor spending of \$19.7 million. Thus, hotel and motels will contribute the highest share of the total economic impacts (e.g. GDP 77.2%).
- Total Gross Domestic Product at Market Prices (GDP), the net monetary benefit to the provincial economy, is estimated at \$29.6 million.
- Largest contributors to the total GDP level of \$29.6 million were:
 - Accommodation, \$8.3 million
 - Food and drinking places, \$5.5 million
 - Gasoline purchases, \$4.6 million
 - Retail, \$3.3 million

Impact Assessment Highlights (cont'd)

- Labour income of \$16.5 million was 55.7% of the total GDP impact of \$29.6 million.
- A total of 445.9 jobs were associated with the total spending of visitors to the Portage la Prairie Region. The top four spending areas with the largest number of jobs were:
 - Food and drinking places, 110.6 jobs
 - Accommodation, 101.1 jobs
 - Gasoline purchases, 68.8 jobs
 - Retail, 57.2 jobs.
- The average labour income for these 445.9 jobs was \$37,000.
- Total tax revenue for all levels of government is estimated at \$6.5 million. The estimated distribution of the revenue was:
 - Hotels and motels, 79.6%
 - Seasonal Campers, 16.0%
 - Overnight Campers, 4.4%.
- Tax revenue by government level was distributed as:
 - Provincial government, \$2.9 million (46.0%)
 - Federal government, \$2.6 million (41.4%)
 - Local governments, \$0.8 million (12.7%).
- A significant portion of the local government tax revenue is attributed to the Region's 5% accommodation tax. It amounted to \$304,500.

I: Approach

To develop a Manitoba-level impact assessment model, the Georgetown Newbury Group (GNG) looked at three specific visitor components. They are:

- Hotels and motels
- Seasonal campsites
- Overnight campsites.

Spending for these three visitor components was estimated for eight specific commodity groups:

1. Accommodation
2. Gasoline
3. Retail
4. Food and beverage stores (groceries, liquor)
5. Food and drinking places (restaurants, pubs, etc.)
6. Performing arts, sports, heritage
7. Amusement and recreation
8. Gambling (including VLTs).

There are two areas that were not assessed due to the lack of reliable information on the volume, flow and spending of these visitors. The first component was the impact of day-visitors to Portage la Prairie. The second was the estimation of “short time” visitors who stop their traveling in Portage la Prairie for food, gasoline, or other consumer items. Therefore, the presented economic and tax revenue estimates underestimate the overall impacts of Portage la Prairie visitors spending during the Sept. 2022 to Aug. 2023 period.

GNG used the latest Manitoba-level information from Statistics Canada’s Input-Output Supply and Use tables. The supply and use tables present an integrated picture of the economy in terms of industries, products and final use categories. The tables illustrate the flow of goods and services from their origin (domestic production or imports) to their destination (inputs by industries to produce other products, capital investments by industries, changes in inventory, exports, and final use by households, governments and non-profit institutions).

The generated economic multipliers from these economic linkages were used to estimate the economic impacts of visitor spending. It needs to be noted that the GNG economic and tax revenue impact results cannot provide a complete or absolute measure of the impact of tourist spending. Therefore, the presented impacts should be treated as general estimates only and never as absolutes.

II: Key Assumptions

Obtaining needed information to conduct the economic and tax revenue impact was a challenge. As a result, several key assumptions were required. The objective of these key assumptions was to be conservative.

Table 1 lists the key assumptions for each of the three impact components. While all assumptions are important, three assumptions are vital for the analysis. They are:

- Average cost per night before taxes
- Average daily occupied nights
- Average daily spending per person

Table 1: Key Assumptions

Assumptions	Hotels and Motels	Seasonal Campsites	Overnight Campsites
Daily room/campsite capacity	344	615	615
Average occupancy rate	50%	65%	65%
Average cost per night before taxes	\$97.00	\$30.67	\$30.00
Average daily occupied nights	172	315	85
Average number persons per room/campsite	2.0	3.5	3.5
Person days in Portage la Prairie	188,340	82,688	31,238
Average daily spending per person before taxes	\$185.99	\$80.00	\$63.00

III: Visitor Volumes and Spending

Using the various key assumptions and other variables, visitor volumes for the year-long study period were calculated. Table 2A presents four of the higher-order visitor statistics for the three accommodation types.

Daily, there were an average of 572 occupied accommodation units. Seasonal campers represented 55% of the occupied accommodation units, followed by hotel and motel guests at 30%.

Total person-days in the Portage la Prairie Region were estimated at 302,265 days. This figure is influenced by the average size of the various visitor groups. For hotel and motel rooms, it was two persons per room. For the seasonal and overnight campsites, the average party size was 3.5 persons. Hotel and motel visitors accounted for 63.2% of the overall person-days. Far behind were the campers. Seasonal campers accounted for 27.4%, and overnight campers 10.3%.

Spending levels, estimated at \$25.5 million, were dominated by hotel and motel guests. Their spending was \$19.7 million or 77.4% of the total. Campers contributed the remaining 22.6%. Hotel and motel visitors' average daily spending of \$186 was driven by the room rate. Only an estimated \$73 daily was for non-accommodation expenditures. In comparison, seasonal campers and overnight campers spent approximately \$50 and \$33 respectively per day.

Table 2A: Selected Visitor Statistics

Selected Statistics	Hotels and Motels	Seasonal Campers	Overnight Campers	Total
Average daily rooms/campsites occupied	172	315	85	572
Total person days in Portage La Prairie	188,340	82,688	31,238	302,265
Total spending per day	\$185.99	\$80.00	\$63.00	\$144.00
Total spending (not taxes included)	\$19,744,300	\$4,551,800	\$1,198,200	\$25,495,500

III: Visitor Volumes and Spending (cont'd)

Table 2B presents the distribution of the \$25.5 million in expenditures across the three accommodation types plus the eight individual spending areas. Spending highlights include:

- Hotel and motel occupants spent \$6.1 million on their rooms, excluding PST, GST and the 5% accommodation tax. This represents 30.8% of the total spend of \$19.7 million for this accommodation type. Food and drinking places had the second highest expenditure level at \$4.2 million or 21.4% of the total spend.
- Seasonal campers spent \$4.6 million for consumer goods and activities. The top two top spending areas were retail and food and beverage stores. Both had spending at \$1.2 million.
- Overnight campers had spending estimated at \$1.2 million. The top two spending areas were retail at \$0.25 million and food and drinking places at \$0.23 million.
- Overall, spending was highest for accommodation (\$7.1 million) and food and drinking places (\$5.1 million).

Table 2B: Spending by Accommodation Type

Spending Area (No taxes included)	Hotel and Motels	Seasonal Campers	Overnight Campers	Total Spending
Accommodation	\$6,089,700	\$724,500	\$267,800	\$7,082,000
Gasoline	\$3,766,800	\$106,300	\$40,200	\$3,913,300
Retail	\$2,118,800	\$1,240,300	\$249,900	\$3,609,000
Food and beverage stores	\$1,412,600	\$1,240,300	\$156,900	\$2,809,800
Food and drinking places	\$4,237,700	\$578,800	\$234,400	\$5,050,900
Performing arts, sports, heritage	\$706,300	\$330,800	\$125,000	\$1,162,100
Amusement and recreation	\$706,300	\$165,400	\$62,500	\$934,200
Gambling	\$706,300	\$165,400	\$62,500	\$934,200
Total	\$19,744,300	\$4,551,800	\$1,198,200	\$25,495,500

IV: Determining the Economic Impact of Visitor Spending

To assess the economic impact of the estimated total spending of \$25.5 million, along with the three separate accommodation types and the eight spending areas, Statistics Canada's 2020 Manitoba-level economic multipliers were employed. These annual multipliers were available on the Statistics Canada website on Dec. 8, 2023.

The starting point to obtain multipliers of interest is from Statistics Canada at:

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610059501>

Table 3A presents the online structure to access the Direct Multiplier for the variable GDP at Market Prices. The selected industry is Traveller Accommodation for the year 2020. Not shown in this form is the geography, which is Manitoba.

Table 3A: Statistics Canada Input-Output multipliers, provincial, detailed level

Multiplier type:

Variable:

Industry:

Reference period
From To

IV: Determining the Economic Impact of Visitor Spending

Table 3B illustrates the economic multipliers by type of multipliers and the three economic variables of this study

- GDP at Market Price at Market Prices
- Labour Income
- Jobs

The GDP and Labour Income multipliers are per \$1 of direct spending, while the Jobs multiplier is calculated per \$1 million of direct spending.

Table 3B: Manitoba Traveller Accommodation Multipliers

Impact Effect	GDP at Market Prices (per dollar of spending)	Labour Income (per dollar of spending)	Jobs (per million dollars of spending)
Direct Impact	0.362	0.213	8.613
Indirect Impact	0.423	0.234	4.087
Induced Impact	0.221	0.086	1.577
Spinoff Impact (Indirect +Induced)	0.642	0.32	5.664
Total Impact	1.005	0.533	14.278

Source: Statistics Canada Table 36-10-0595-01 (released 2023-12-05)

IV: Determining the Economic Impact of Visitor Spending (cont'd)

Similar multiplier tables to Table 3B were developed for the remaining seven spending areas, as displayed in Table 2B.

The definition of these impact effects is discussed in the glossary of terms on page 78.

Table 3C presents the application for the traveller accommodation multipliers to the estimated direct spending of hotel and motel guests. The total impact is \$7.1 million on the direct spending of \$6.1 million.

The direct effects is estimated at \$3.2 million, representing 45.3% of the total impact. The spin-off effect, combining the indirect and induced effects, is the remaining 54.7%.

The direct multiplier in Table 3C can be computed as 0.532. The reason why it differs from the 0.362 in Table 3B is due to the addition of indirect taxes such as the 5% accommodation tax. This adjustment was the only one made to the direct multipliers used in this study.

Table 3C: Traveller Accommodation Spending Impacts

Gross Domestic Product	Total spending	Direct	Spin-offs	Total Impact
Accommodation	\$6,089,660	\$3,239,699	\$3,909,562	\$7,149,261

V: Economic Impact of Visitor Spending: Hotels and Motels

Total direct spending of persons staying in hotel and motels was estimated at \$19.4 million, excluding applicable taxes. The top two spending areas were accommodation at \$6.1 million and food and drinking places at \$4.2 million.

Table 4 illustrates the estimated economic impacts (direct + indirect + induced) of the spending of \$19.4 million for:

1. Gross Domestic Product at Market Prices (GDP)
2. Labour Income
3. Jobs
4. Average Labour Income

Table 4's format will continue for the subsequent impacts for seasonal campers, overnight campers and for the overall total impact of the three accommodation types.

Table 4: Economic Impact: Hotels and Motels

Spending Area	Total Spending (no taxes included)	GDP Impact	Labour Income Impact	Jobs Impact	Average Labour Income
Accommodation	\$6,088,700	\$7,149,300	\$3,245,800	86.9 jobs	\$37,300
Gasoline	\$3,765,800	\$4,388,300	\$2,184,700	66.3 jobs	\$33,000
Retail	\$2,118,800	\$2,568,000	\$1,426,000	33.6 jobs	\$42,500
Food and beverage stores	\$1,412,600	\$1,745,900	\$1,049,500	26.6 jobs	\$39,400
Food and drinking places	\$4,237,700	\$4,593,600	\$3,023,400	92.8 jobs	\$32,600
Performing arts, sports, heritage	\$706,300	\$795,300	\$564,300	11.1 jobs	\$51,000
Amusement and recreation	\$706,300	\$858,100	\$588,300	17.2 jobs	\$34,200
Gambling	\$706,300	\$802,300	\$489,400	10.8 jobs	\$45,200
Total	\$19,744,300	\$22,900,800	\$12,569,600	345.3 jobs	\$36,400

V: Economic Impact of Visitor Spending: Hotels and Motels (cont'd)

Impact highlights for hotels and motels include:

- Total GDP of \$22.9 million on expenditures of \$19.7 million. GDP is the net value-added resulting from the direct spending. Furthermore, the GDP is the net benefit to the Manitoba economy.
- The largest contribution to GDP were accommodations at 31.2% and food and drinking places at 20.1%.
- Labour income impact was \$12.6 million. This represents 55.0% for the total GDP impact.
- Just like GDP, the top two contributors to Labour income were accommodation and food and drinking places.
- There were 345.3 jobs associated with the direct hotel and motel spending of \$19.7 million.
- The overall average labour income turns out to be \$36,400.

VI: Economic Impact of Visitor Spending: Campers

Tables 5 and 6 provide the economic impacts for seasonal and overnight campers respectively. Table 7 provides the combined economic impacts for all campers.

For the combined seasonal and overnight campers, highlights include:

- Total expenditures of \$5.7 million, dominated by the seasonal camper spending of \$4.6 million.
- Total GDP impact of \$6.7 million. Largest contributors to this GDP level were retail at \$1.8 million and food and beverage stores at \$1.7 million.
- Labour income of \$3.9 million was 58.5% of GDP impact of \$6.7 million.
- A total of 101 jobs were associated with the spending of campers.
- The average labour income for these 101 jobs was \$39,200.

Table 5: Economic Impact: Seasonal Campers

Spending Area	Total Spending (no taxes included)	GDP Impact	Labour Income Impact	Jobs Impact	Average Labour Income
Accommodation	\$724,500	\$814,300	\$386,200	10.3 jobs	\$37,300
Gasoline	\$106,300	123,800	\$61,700	1.9 jobs	\$33,000
Retail	\$1,240,300	1,503,200	\$834,700	19.7 jobs	\$42,500
Food and beverage stores	\$1,240,300	\$1,533,000	\$921,600	23.4 jobs	\$39,400
Food and drinking places	\$578,800	\$627,400	\$412,700	12.7 jobs	\$32,600
Performing arts, sports, heritage	\$330,800	\$372,400	\$264,700	5.2 jobs	\$51,000
Amusement and recreation	\$165,400	\$200,900	\$137,800	4.0 jobs	\$34,200
Gambling	\$165,400	\$187,900	\$114,600	2.5 jobs	\$45,200
Total	\$4,551,8	\$5,363,100	\$3,133,400	79.6 jobs	\$39,300

VI: Economic Impact of Visitor Spending: Campers (cont'd)

Table 6: Economic Impact: Overnight Campers

Spending Area	Total Spending (no taxes included)	GDP Impact	Labour Income Impact	Jobs Impact	Average Labour Income
Accommodation	\$267,800	\$301,000	\$142,700	3.8 jobs	\$37,300
Gasoline	\$40,200	\$46,800	\$23,300	0.7 jobs	\$33,000
Retail	\$249,900	\$302,900	\$168,200	4.0 jobs	\$42,500
Food and beverage stores	\$156,900	\$193,000	\$116,000	2.9 jobs	\$39,400
Food and drinking places	\$234,400	\$254,000	\$167,000	5.1 jobs	\$32,600
Performing arts, sports, heritage	\$125,000	\$140,700	\$99,900	2.0 jobs	\$51,000
Amusement and recreation	\$62,500	\$76,000	\$52,000	1.5 jobs	\$34,200
Gambling	\$62,500	\$71,000	\$43,300	1.0 jobs	\$45,200
Total	\$1,198,200	\$1,385,200	\$812,400	21.0 jobs	\$38,700

VI: Economic Impact of Visitor Spending: Campers (cont'd)

Table 7: Economic Impact: Seasonal and Overnight Campers

Spending Area	Total Spending (no taxes included)	GDP Impact	Labour Income Impact	Jobs Impact	Average Labour Income
Accommodation	\$992,300	\$1,115,300	\$528,900	14.2 jobs	\$37,300
Gasoline	\$146,500	\$170,600	\$85,000	2.6 jobs	\$33,000
Retail	\$1,490,200	\$1,806,100	\$1,002,900	23.6 jobs	\$42,500
Food and beverage stores	\$1,396,500	\$1,726,100	\$1,037,600	26.3 jobs	\$39,400
Food and drinking places	\$813,100	\$881,400	\$579,700	17.8 jobs	\$32,600
Performing arts, sports, heritage	\$455,700	\$513,100	\$364,100	7.1 jobs	\$51,000
Amusement and recreation	\$227,900	\$276,900	\$189,800	5.6 jobs	\$34,200
Gambling	\$227,900	\$258,800	\$157,900	3.5 jobs	\$45,200
Total	\$5,749,900	\$6,748,300	\$3,945,900	101.0 jobs	\$39,200

VII: Total Economic Impact of Visitors to Portage la Prairie

Highlights of the total visitor spending impacts of the three accommodation types – hotels, motels and campers – are presented in Table 8. The highlights include:

Table 8: Economic Impact: Hotels, Motels, Seasonal Campers and Overnight Campers

Spending Area	Total Spending (no taxes included)	GDP Impact	Labour Income Impact	Jobs Impact	Average Labour Income
Accommodation	\$7,081,900	\$8,264,600	\$3,774,700	101.1 jobs	\$37,300
Gasoline	\$3,913,300	\$4,558,900	\$2,269,700	68.8 jobs	\$33,000
Retail	\$3,609,000	\$4,374,200	\$2,429,000	57.2 jobs	\$42,500
Food and beverage stores	\$2,809,000	\$3,472,000	\$2,087,100	52.9 jobs	\$39,400
Food and drinking places	\$5,050,700	\$5,475,000	\$3,601,200	110.6 jobs	\$32,600
Performing arts, sports, heritage	\$1,162,000	\$1,308,400	\$928,400	18.2 jobs	\$51,000
Amusement and recreation	\$934,100	\$1,135,000	\$778,100	22.8 jobs	\$34,200
Gambling	\$934,100	\$1,061,200	\$647,300	14.3 jobs	\$45,155
Total	\$25,494,200	\$29,649,200	16,515,437	445.9 jobs	\$37,038

VIII: Generated Manitoba-Level Tax Revenue

There is considerable tax revenue generated from visitor spending in the Portage la Prairie Region. For this impact assessment, tax revenue estimates have been kept separate from consumer expenditures. The primary reason for this is that incurred direct tax revenue is not a multiplying factor. Effectively, tax revenue goes into bank accounts for the respective level of government.

Table 9 displays the estimated tax revenue flows for the three government levels. Of note:

- Total tax revenue for all levels of government is estimated at \$6.5 million. The estimated distribution of the revenue was:
 - Hotels and motels, 79.6%
 - Seasonal campers, 16.0%
 - Overnight campers, 4.4%

- Tax revenue by government level was distributed as:
 - Provincial government, \$2.9 million (46.0%)
 - Federal government, \$2.6 million (41.4%)
 - Local governments, \$0.8 million (12.7%)
- A significant portion of the local government revenue is attributed to the 5% accommodation tax. It amounted to \$304,500.

Table 9: Tax Revenue by Level of Government

Level of Government	Hotels and Motels	Seasonal Campers	Overnight Campers	Total	Percent Share
Provincial	\$2,400,700	\$505,900	\$138,650	\$3,045,300	46.8%
Federal	\$2,081,500	\$445,900	\$121,200	\$2,648,600	40.7%
All Local	\$699,400	\$91,000	\$24,000	\$814,400	12.5%
All Governments	\$5,181,500	\$1,042,800	\$283,700	\$6,508,300	100.0%

IX: The Portage Model

As noted in Section II: Key Assumptions, there were several assumptions necessary to complete the economic impact assessment. There can be differing opinions on what the “right assumptions” should be. In addition, there may be a desire to simulate the outcomes or impacts based on a different set of assumptions, such as increased room occupancy rates or visitor spending.

Therefore, as a key part of this Tourism Economic Impact Assessment, we have created the Portage Model. Any user will be able to use this software tool, created in Excel, to input their own views of variables such as room capacity, occupancy rates, room rates and daily consumer expenditures. The tool is applicable to Portage la Prairie or any other Manitoba community.

Currently, the tool is in test mode. For access to the full tool, please contact the Portage Regional Economic Development.

Example of the Portage Model (Hotel Guest Spending)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2					125,560								
3													
4					1.5								
5													
6					188,340								
7													
8													
9													
10													
11													
12													
13					First day	2nd day	Total	Per Day			Total spending		
14					\$ 113	\$ 113	\$ 226.98	\$ 113.5			\$ 7,124,902		
15						2nd 1/2 day							
16					\$ -	\$ 40.0	\$ 40.0	\$ 20.00			\$ 3,766,800		
17					\$ 15.0	\$ 7.5	\$ 22.5	\$ 11.25			\$ 2,118,825		
18					\$ 10.0	\$ 5.0	\$ 15.0	\$ 7.50			\$ 1,412,550		
19					\$ 40.0	\$ 25.0	\$ 65.0	\$ 32.50			\$ 6,121,050		
20					\$ 5.0	\$ 2.5	\$ 7.5	\$ 3.75			\$ 706,275		
21					\$ 5.0	\$ 2.5	\$ 7.5	\$ 3.75			\$ 706,275		
22					\$ 5.0	\$ 2.5	\$ 7.5	\$ 3.75			\$ 706,275		
23													
24					\$ 193	\$ 198	\$ 392	\$ 195.99			\$ 22,662,952	including taxes of	\$ 1,035,242
25													
26							\$ 196	including accommodation cost					
27							\$ 83	excluding accommodation cost					
28													
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X: Glossary of Terms

Direct Manitoba Expenditures: Direct Manitoba Expenditures identifies the volume of total expenditures estimated to be spent directly in Manitoba. Only expenditures in Manitoba can impact Manitoba GDP, labour income and employment etc. Direct Expenditures outside of Manitoba are a direct leakage from the economy, and do not impact Manitoba GDP, labour income and employment levels.

Direct Manitoba Supply: The value of Direct Manitoba Expenditures estimated to be produced by Manitoba industry. To yield high impacts relative to direct expenditures, the direct supply should approach the value of direct expenditures. A relatively small direct supply value results in lesser impacts to the economy.

Gross Expenditures: Additional expenditures by businesses and persons are levered by the Direct Expenditures. The Gross Expenditures statistic provides a measure of these expenditures, which includes re-spending of the initial direct expenditures by suppliers and wage earners. It represents the gross monetary benefit to the economy.

GDP at Market Prices: A measure of the total value of goods and services produced in the economy, GDP at Market Prices is the net monetary benefit to the economy. This statistic removes the double counting of expenditures and expenditure leakages from the economy, which are included in the Gross Expenditures statistic.

Labour Income: The sum of all wages, salaries, supplementary Labour income and net income of unincorporated businesses. Any or all of these may be present in the Direct Expenditures and resultant Direct, Indirect and Induced Impacts.

Employment: The employment estimated to result from the above Labour Income. Jobs are presented as "full-time equivalent person years" (i.e., one job represents the equivalent of one person being employed on a full-time basis for a period of one year).

Federal Taxes: The sum of Federal Income Taxes (Corporate and Personal), Other Direct Federal Taxes and Indirect Federal Taxes, estimated to be collected in Manitoba.

Provincial Taxes: The sum of Provincial Income Taxes (Corporate and Personal), Other Direct Provincial Taxes and Indirect Provincial Taxes, estimated to be collected in Manitoba.

Local Taxes: An estimate of the total taxes, of any description, accruing to all local municipalities in Manitoba because of the project or activity being assessed and its spin-off activities.

