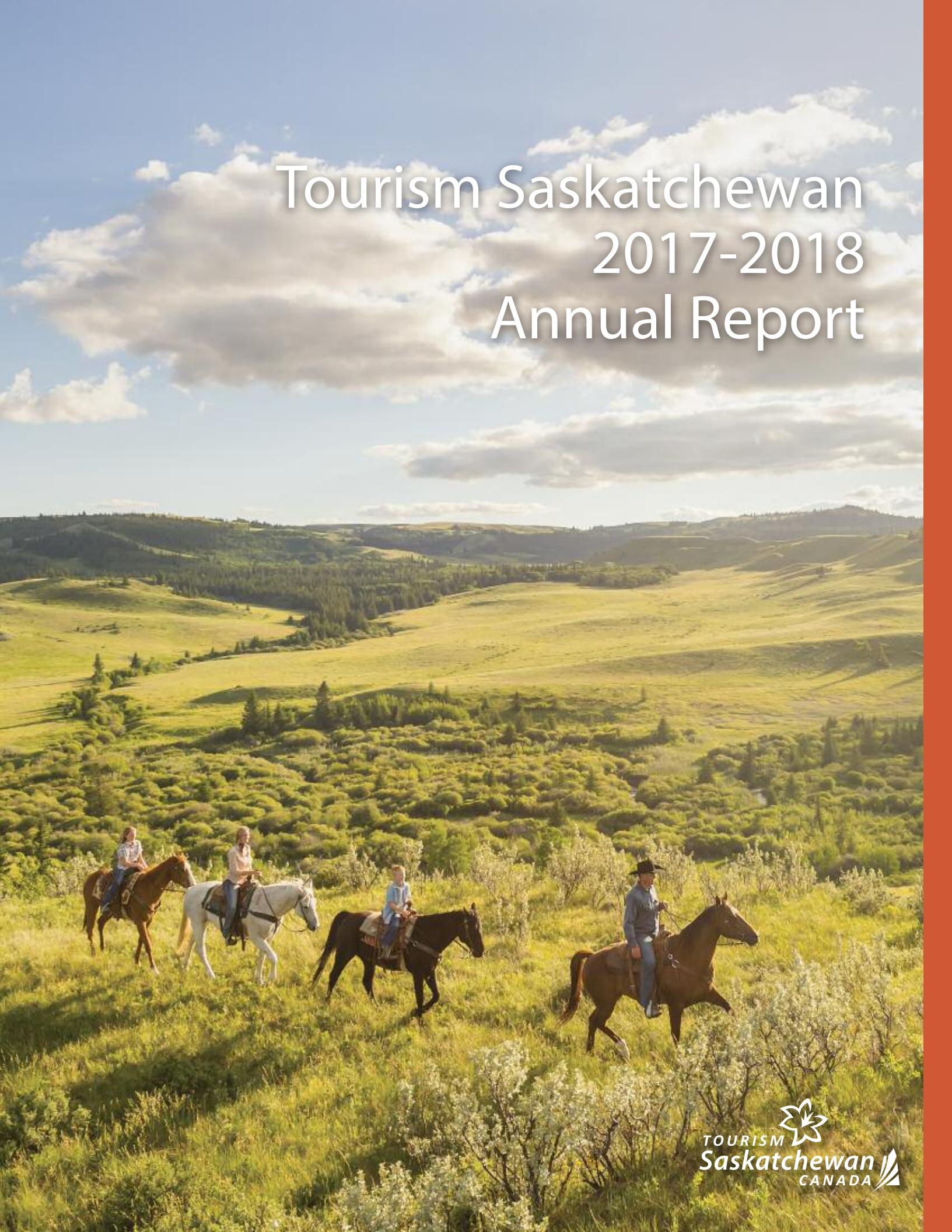


Tourism Saskatchewan 2017-2018 Annual Report



\$2.37 BILLION
in travel expenditures

13.6 MILLION
visits to and within Saskatchewan

1.4 BILLION
advertising and marketing-generated impressions

67,200
residents employed in tourism

4,200
Saskatchewan tourism products and services

VISION:

A vibrant entrepreneurial tourism industry
offering year-round compelling and memorable
Saskatchewan experiences

MISSION:

Connect people with quality Saskatchewan
experiences and advance the development
of successful tourism operations

Letter of Transmittal

His Honour, The Honourable W. Thomas Molloy
Lieutenant Governor of the Province of Saskatchewan

May it Please Your Honour:

With respect, I submit Tourism Saskatchewan's Annual Report for the fiscal period ending March 31, 2018.

In compliance with *The Tourism Saskatchewan Act*, this document outlines the corporation's business activities and includes audited financial statements.



Gene Makowsky
Minister Responsible for Tourism Saskatchewan

Introduction

This annual report contains information about Tourism Saskatchewan's activities during the past fiscal year (April 1, 2017 to March 31, 2018), along with financial statements for that period.

The purpose of the document is to report to public and elected officials on commitments made and other key accomplishments within the identified fiscal period. It outlines results on committed strategies, actions and performance measures identified in Tourism Saskatchewan's Strategic Plan 2017-2018, and denotes progress made on Government commitments, as identified in

Government Direction for 2017-18: Meeting the Challenge, *The Saskatchewan Plan for Growth – Vision 2020 and Beyond*, throne speeches and other statements.

The information contained within demonstrates Tourism Saskatchewan's commitment to effective public-performance reporting, transparency and accountability.

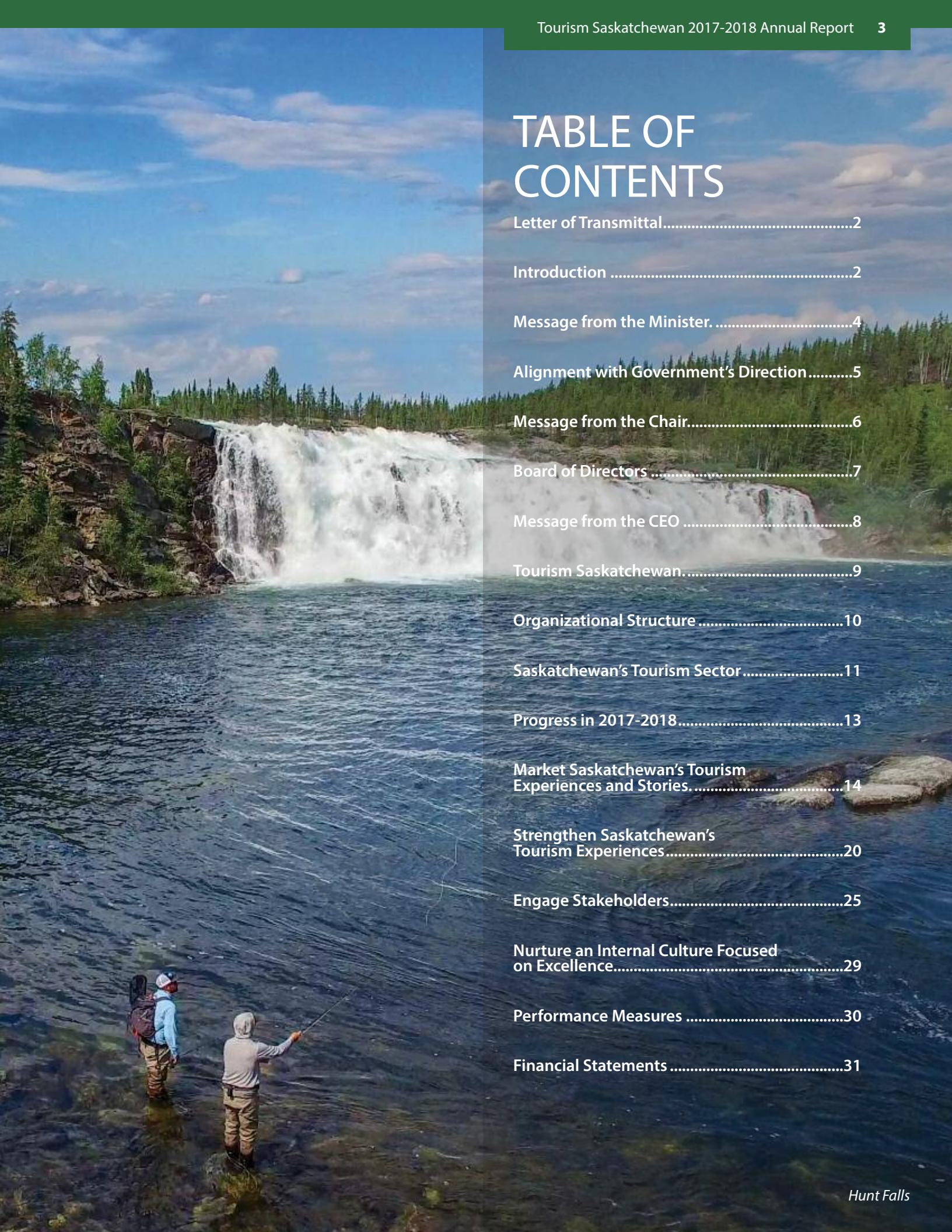


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Message from the Minister



As Minister Responsible for Tourism Saskatchewan, I am pleased to acknowledge the organization's accomplishments in 2017-2018, outlined on the following pages. The information in this annual report highlights the strategic and innovative work to market Saskatchewan as a travel destination, build an industry that offers exceptional products and experiences, and ensure a robust tourism workforce.

The tourism industry in Saskatchewan continues to show strong growth. The sector reported \$2.37 billion in travel expenditures in 2017 and over 67,000 Saskatchewan residents employed in tourism-related jobs. Clearly, tourism is a solid player in the economy, and contributes to the many reasons why Saskatchewan is a great place to live, work and visit.

More than 13.6 million visits were made to and within the province last year.

Research indicated a growing number of Canadians are discovering

Saskatchewan and more of our own residents are realizing that there is so much to see and experience, right here at home. Online channels and social media are the go-to sources for consumers as they search for details about a destination, consider ratings and reviews, and gather inspiration from stories, photographs, video and blogs shared by other travellers.

Saskatchewan has enviable tourism resources and, as a four-season destination, offers a diverse range of experiences. Outdoor recreation and adventures in nature are cornerstones of the industry. Hospitality is standard in communities small and large, rural and urban. Vibrant cities play host to memorable national and international events, and treat visitors to fond memories, new friendships and many reasons to return.

The Government of Saskatchewan recognizes the importance of investing in tourism, building a robust, competitive industry and increasing visitation.

Tourism Saskatchewan is a highly regarded partner, admired for its achievements and its values of working collaboratively, empowering stakeholders and nurturing an environment that serves industry and visitors. The achievements made in 2017-2018 are impressive.

A handwritten signature in black ink, appearing to read "Gene Makowsky".

Gene Makowsky
Minister Responsible for Tourism Saskatchewan

Alignment with Government's Direction

Tourism Saskatchewan's 2017-2018 Annual Report aligns with Government's Vision and four Goals:

Our Government's Vision

Saskatchewan's vision is to be the best place in Canada – to live, to work, to start a business, to get an education, to raise a family and to build a life.

Government's Goals

1. Sustaining growth and opportunities for Saskatchewan people
2. Meeting the challenges of growth
3. Securing a better quality of life for all Saskatchewan people
4. Delivering responsive and responsible government

Government's Vision and four Goals provide a directional framework for ministries, agencies and third parties. Tourism Saskatchewan's 2017-2018 activities align with these priorities in an effort to achieve greater success in the efficient delivery of Government services.

Together, all ministries and agencies support the achievement of Government's four Goals and work toward a growing and prosperous Saskatchewan.

In 2017-2018, Tourism Saskatchewan supported the Government's goals through the following:

- Proceeding with the recommendations from a comprehensive Content Strategy to navigate change to a digital-first marketing approach and ensure compelling Saskatchewan stories and content are reaching key audiences
- Implementing the steps and actions outlined in the Strategic Plan 2017-18 – 2020-21 to support sector growth and advancement and build awareness of Saskatchewan as a tourism destination
- Delivering influential, branded content to key market segments on the most effective channels
- Launching a new and improved industry website, Industry.TourismSaskatchewan.com, that aligns with the appearance and quality of Tourism Saskatchewan's suite of resources and tools, and provides operators with information and opportunities to enhance business

- Conducting research to identify the resources and channels most frequently used by Saskatchewan's key travel markets
- Delivering reputable, high-quality tourism education and training programs to enhance employment opportunities and build a skilled, service-driven tourism workforce
- Transitioning to a new Learning Management System to improve access to online training and education
- Introducing new awe-inspiring tourism products into market and working with operators to expand experiential tourism offerings in Saskatchewan
- Embarking on a product development strategy process that will yield a roadmap for industry advancement and enriched tourism products and experiences
- Delivering an Event Hosting Program that supports a range of events in Saskatchewan communities, helps attract national and international championships and conferences, and positions Saskatchewan favourably as a host destination
- Delivering professional travel counselling and visitor services to address consumer inquiries, promote Saskatchewan hospitality and contribute to positive first impressions and remarkable guest experiences
- Partnering with industry, stakeholders and Government to maximize resources, align activities and strengthen and expand tourism opportunities

Message from the Chair



As Chair of Tourism Saskatchewan's Board of Directors, I am pleased to highlight some of the innovative projects and creative work that are positioning Saskatchewan more competitively as a destination, building a strong workforce and enhancing travel experiences. This annual report summarizes the organization's progress during the fiscal year spanning April 1, 2017 – March 30, 2018. It was a period that saw exciting change and new direction on several fronts, driven by sound market research and a commitment to continuous improvement.

Given rapidly advancing technology and travel trends that can change on a whim, there are always interesting challenges to delivering on Tourism Saskatchewan's broad mandate. Its responsibilities include marketing Saskatchewan as a destination, providing visitor services, leading industry development initiatives, delivering tourism education and training, and managing an event funding program.

Vision and Mission statements provide a clear focus for the organization:

Vision – A vibrant entrepreneurial tourism industry offering year-round compelling and memorable Saskatchewan experiences

Mission – Connect people with quality Saskatchewan experiences and advance the development of successful tourism operations

The pages that follow highlight projects that were a focus in 2017-2018, and offer insights into activities that support four strategic priorities:

- Market Saskatchewan's Tourism Experiences and Stories;
- Strengthen Saskatchewan's Tourism Experiences;
- Engage Stakeholders; and
- Nurture an Internal Culture Focused on Excellence.

Considerable "behind the scenes" work was required on comprehensive upgrades to both the consumer

and industry websites, as well as the transition to a new Learning Management System for online education and training programs.

Out in front, strategic and engaging digital marketing activities communicated Saskatchewan's tourism brand that reflects the province's compelling attributes: land and sky; time and space; and community. Recommendations from a detailed Content Strategy report elevated Saskatchewan storytelling in ways that appeal to our key travel markets and reach consumers on the channels they use for travel information.

Saskatchewan hospitality was a centerpiece of tourism events, festivals and national and international championships supported by the application-based Event Hosting Program. Uptake by meeting and convention organizers signalled new partnerships for promoting Saskatchewan, attracting visitors and treating them to remarkable experiences.

I share the Board table with colleagues Kevin Dureau, Brian Hoffart, Lawrence Joseph, Jori Kirk, Sandra LeBarre, Cory Rideout (Vice-Chair) and Irene Seiferling. As a skills-based board, we provide broad strategic direction. We have a responsibility to ensure that business and finances are in order.

My colleagues and I consider it a privilege to work alongside CEO Mary Taylor-Ash and her team of professionals, who lead by example. This quality is reflected in a commitment to being an Employer of Choice and in collaborating with a wide range of partners and stakeholders. It is evident in work with industry to advance product development, and in the dedication to individuals enrolled in programs delivered by the Saskatchewan Tourism Education Council.

This report looks back on many proud moments and accomplishments in 2017-2018 and affirms another period of sound financial management.

A handwritten signature in black ink, appearing to read "Norm Beug".

Norm Beug
Chair, Board of Directors

Board of Directors



*Left to right: Jori Kirk, Lawrence Joseph, Sandra LeBarre, Dana Soonias, Norm Beug, Brian Hoffart, Irene Seiferling
Missing: Kevin Dureau, Cory Rideout*

Tourism Saskatchewan is led by an eight-member Board of Directors appointed by Government. As a skills-based board, members bring solid business knowledge and experience to their role in providing broad policy direction to the Treasury Board Crown Corporation.

The board has established three committees to address specific areas of responsibility:

- Audit Committee
- Governance Committee
- Human Resource Committee

Tourism Saskatchewan acknowledges the following individuals for their commitment to serving on the Board of Directors:

- Norm Beug, Chair
- Cory Rideout, Vice-Chair
- Kevin Dureau
- Brian Hoffart
- Lawrence Joseph
- Jori Kirk
- Sandra LeBarre
- Irene Seiferling
- Dana Soonias (retired from the Board in 2017)

Message from the CEO



Tourism marketing is fast-paced, unpredictable and fiercely competitive. It demands forward thinking, researching and staying ahead of trends, and embracing change. Tourism Saskatchewan, in fact, applies this formula to all of our mandated roles, from marketing the province as a travel destination to developing and promoting the quality of tourism products and services, along with other functions.

Our day-to-day work, across all departments, requires a precise focus on the road in front of us, navigating exciting twists and turns, powering through the occasional up-hill climb and taking the most efficient route to reach our goals. This report plots some of the high points of our journey in 2017-2018.

The comprehensive Content Strategy provided a roadmap for delivering targeted, branded content based on research, trends and consumer needs. It changed the internal vocabulary, and our mantra became “digital first, always on,” which requires a very visual approach to storytelling and ensures our digital channels feature fresh, ever-changing, influential content.

Like any worthwhile project, there were a few growing pains and some difficult choices, including ceasing publication of annual, listings-based travel guides. Solid research would steer us toward creating new resources and opportunities that yield greater exposure for tourism operators and put them directly in front of consumers.

A number of changes in staff roles and responsibilities and the addition of new team members positioned us to meet our needs for creating content that appeals to Saskatchewan’s key travel markets and inspires them to set their sights on vacationing in our beautiful province.

Tourism Saskatchewan’s staff have an abundance of knowledge about our province’s markets – enough to create personas of travellers who are frequent visitors or have the greatest potential to discover and fall in love with Saskatchewan. With a picture in our minds of Val, the keeper of family memories; Scott, the new experience seeker; and Chad, the fishing fanatic, there is a natural flow of ideas, stories and tactics to influence their vacation plans.

This research clearly influenced our foray into new U.S. markets with a high concentration of residents passionate about fishing and hunting, and keen to travel for outdoor adventure. Partnerships with Destination Canada and several other provinces are a win-win, expanding each jurisdiction’s reach into lucrative markets south of the border and sending a compelling invitation to head north for outstanding fishing and hunting.

As storytelling becomes second nature to us, we recognize that there are interesting narratives in so many of our projects, involving every branch of our organization. In every department and area of focus, in our relationships with industry, in initiatives relating to product development or education and training, and in the events that are hosted in Saskatchewan – stories exist that speak to the authenticity, the experiences and the character of this place that we call home.

I consider it a privilege, every day, to work alongside professionals who are so committed to our industry and province, and with Board members who set the strategy and support our efforts. Equally gratifying are opportunities to connect with the hardworking people in our industry – they are truly the heart of tourism in Saskatchewan.

A handwritten signature in cursive ink, appearing to read "Mary Taylor-Ash".

Mary Taylor-Ash
CEO

Tourism Saskatchewan

Tourism Saskatchewan promotes the province as a tourism destination by providing in-province and out-of-province marketing and visitor services. Tourism Saskatchewan assists industry to market and develop quality tourism products through co-operative marketing, education and training and event funding programs.

Tourism Saskatchewan was established in accordance with *The Tourism Saskatchewan Act*, proclaimed on July 1, 2012. A Treasury Board Crown Corporation within the meaning of *The Crown Corporations Act, 1993*, Tourism Saskatchewan is a continuation of the Saskatchewan Tourism Authority, created under *The Tourism Authority Act, 1994*.

The corporation's mandated purposes are:

- a) To market Saskatchewan as a tourism destination in domestic, national and international markets
- b) To assist Saskatchewan's tourism industry operators to market their products
- c) To develop and promote the quality of tourism products and services in Saskatchewan
- d) To provide visitor information services
- e) To undertake any other activities or functions assigned by the Lieutenant Governor in Council

Responsibility for Tourism Saskatchewan is assigned to the Minister Responsible for Tourism Saskatchewan. An appointed, skills-based Board of Directors provides policy direction to the Chief Executive Officer (CEO).

Under the leadership of CEO Mary Taylor-Ash, staff in Regina, Saskatoon and four field offices drive the work that builds on the organization's solid foundation and steers Tourism Saskatchewan toward fulfilling its goals. Activities and projects align with the Vision, Mission, Corporate Values and Guiding Principles.

Vision: A vibrant entrepreneurial tourism industry offering year-round compelling and memorable Saskatchewan experiences

Mission: Connect people with quality Saskatchewan experiences and advance the development of successful tourism operations

Corporate Values

- Nurture a vibrant and creative organization dedicated to serving the industry and the visitor
- Empower each other and our stakeholders to be innovative and to take risks
- Work collaboratively to build effective, respectful relationships and an inclusive approach for the purpose of delivering excellent results

Guiding Principles:

- Alignment – align our activities, internally and with stakeholders
- Collaboration – collaborate for the mutual benefit of the organization and our stakeholders
- Market-driven – ensure initiatives are market-driven
- Accountable – to industry, public taxpayers and Government

Tourism Saskatchewan's Strategic Plan 2017-2018 identifies four Strategic Priorities:

- Market Saskatchewan's Tourism Experiences and Stories
- Strengthen Saskatchewan's Tourism Experiences
- Engage Stakeholders
- Nurture an Internal Culture Focused on Excellence

With this solid framework in place, focus and attention are directed at key markets supported by research, and on projects and activities that will advance the province's tourism sector and stimulate economic growth.

Organizational Structure

Executive Office

- Responsible for the framework and day-to-day oversight of all operational activities
- Serves as the main interface between the corporation, its Board of Directors and Government
- Provides administrative support to the Board of Directors
- Through the Chief Executive Officer (CEO):
 - leads the delivery of Tourism Saskatchewan's mandate and vision
 - manages government and community relations
 - nurtures stakeholder and industry partnerships
 - oversees the strategic plan and tactical operations

Marketing and Communications

- Responsible for strategies and tactics that promote Saskatchewan tourism experiences and generate visitation to and within the province
- Works with industry to market Saskatchewan as a destination
- Collects and creates content to promote Saskatchewan's tourism experiences and stories
- Manages industry and corporate communications
- Participates in research to determine high-impact target markets
- Delivers professional travel counselling through Tourism Saskatchewan's Regina headquarters
- Departments: Marketing; Communications; Field Operations; Visitor Services

Industry and Community Development

- Supports efforts to attract national and international events to the province
- Manages a funding program that assists communities with event hosting
- Responsible for tourism education and training to address the challenges of a competitive labour market
- Assists destination areas, communities and operators in developing and co-ordinating tourism assets to enrich the quality of experiences
- Initiates and supports tourism planning and development activities to grow tourism in Saskatchewan
- Departments: Saskatchewan Tourism Education Council (STEC); Events; Product Development

Corporate Services

- Provides leadership and co-ordination in the areas of strategic planning and monitoring, financial services, enterprise risk management, legislative compliance and contract management
- Develops and implements internal human resource strategies
- Supplies information technology services
- Responsible for research, information collection, information management, privacy protection and records management
- Departments: Finance and Administration; eBusiness and Technology; Human Resources; Planning and Research

Saskatchewan's Tourism Sector



SaskPower Windscape Kite Festival, Swift Current

Saskatchewan has an impressive wealth of tourism resources, ranging from nearly 100,000 lakes and limitless opportunities for outdoor recreation to an enviable parks system of two national, 36 provincial and almost 80 regional parks to signature attractions that tell the stories of Saskatchewan's history, culture and people.

Striking landscapes, dramatic skies (both night and day), a renowned brand of hospitality and four distinct and beautiful seasons are just some of the characteristics that make Saskatchewan stand out as a destination that offers authentic, diverse travel experiences.

Year round, communities throughout the province – large and small, urban and rural – host a flurry of activities, events and celebrations. Festivals, national and international sports championships, and large conferences put Saskatchewan on the map as a place that knows how to host a successful, memorable event.

Saskatchewan's tourism economy rebounded in 2017, achieving growth levels comparable to 2010-2014. Preliminary data shows that travel expenditures reached \$2.37 billion, and more than 13.6 million

visits were made to and within the province. Over 5.6 million of these visits were for one or more nights, with \$1.6 billion spent on overnight or longer visits – an eight per cent increase over 2016.

Growth was experienced across all markets for Saskatchewan. There was a significant increase in Canadian visitors, 17 per cent over the previous year. Canada 150 celebrations and related activities, such as free entry into national parks, may have played a role in visitation growth. Good weather, targeted marketing activities and a recovery in the Canadian economy are additional factors that may account for increases in travel.

Saskatchewan residents travelled more frequently in 2017, yielding 3.9 million overnight or longer trips. Eighty-seven per cent of residents reported taking a vacation or pleasure trip, and 56 per cent of those took three or more trips. Visiting friends and relatives is the main travel motivator for Saskatchewanians and Canadians, in general. People also seek Saskatchewan for outdoor and pleasure travel. Increases in those markets were 35 per cent last year.

Travellers from the United States primarily come here for vacation or pleasure. Fishing and hunting are their



Drift Sidewalk Café & Vista Lounge, Saskatoon

main reasons for visiting, or they may be here as part of a Western Canadian trip. A strong U.S. economy and low Canadian dollar may account for a 28 per cent rise in Americans entering Saskatchewan by road in 2016.

Tourism is a highly competitive industry. Travellers have limitless options when it comes to vacation planning. They are digitally savvy and expect to find accurate information in an instant. There is a growing appreciation of experiences that are authentic, reveal the heart of a community, and lead to personal discoveries.

Greater operator investment in capital improvements, product development, online presence and reputation management, and employee training will enrich visitor experiences and enhance Saskatchewan's reputation as a must-see destination.

Enhancing Communities through Employment and Opportunities

Tourism is a sector of five industries:

- Accommodation
- Food and Beverage Services
- Recreation and Entertainment
- Transportation
- Travel Services

Virtually all other areas of business or commerce are influenced by activities in tourism.

A vibrant tourism sector, one committed to product and service excellence, reflects a positive image for a

destination and contributes to the success of other businesses. Saskatchewan has approximately 3,200 organizations offering 4,200 tourism products and services. Tourism-related businesses and activities provide full- and part-time employment to 67,200 citizens, more than 10 per cent of the working population.

Tourism Benefits Quality of Life

A strong, healthy tourism sector benefits Saskatchewan citizens on many levels. It contributes to the quality of life through public investments in infrastructure, transportation, provincial and regional parks, cultural activities, attractions, events, recreational facilities and other areas.

Tourism is a valuable source of tax revenue for all levels of government. In 2017, tourism in Saskatchewan generated \$889.5 million in taxes on tourism wages and expenditures.

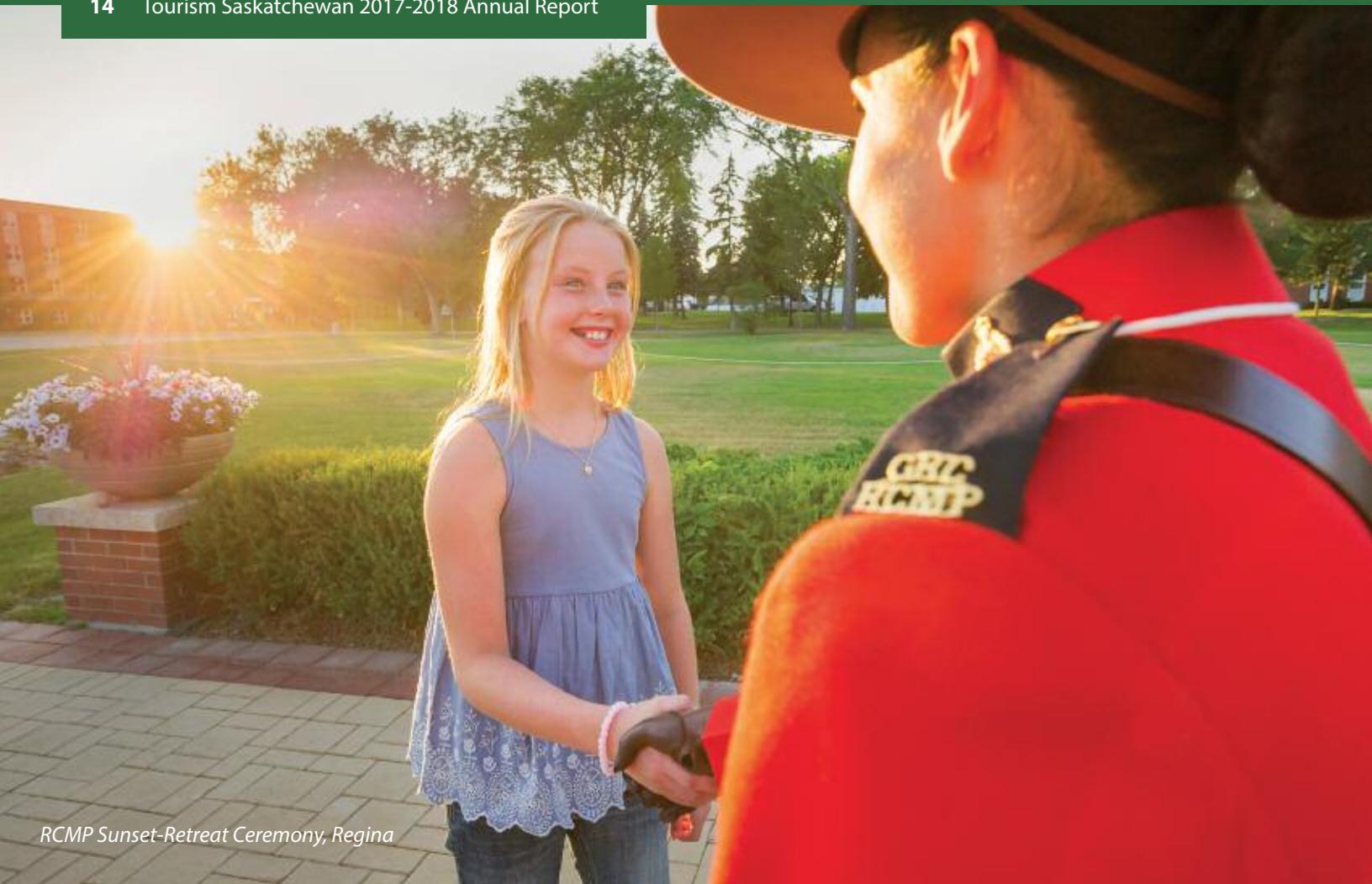
Federal taxes	\$550 million
Provincial taxes	\$348.7 million
Municipal taxes	\$ 40.8 million
Total	\$889.5 million

Tourism is an important export industry. Export revenue for 2017 is an estimated \$608.3 million (excluding airfares). This is new money coming into the province, staying in the province, and benefitting cities and towns, municipalities, communities and the people who live and work in Saskatchewan.

PROGRESS IN 2017-2018

A photograph taken from the perspective of someone in a yellow kayak. The kayak's bow is visible at the bottom of the frame, pointing towards a calm, dark blue lake. The lake's surface is perfectly still, creating a clear reflection of the sky above. The sky is a vibrant blue, dotted with scattered white and grey clouds. In the distance, a dense forest of tall evergreen trees lines the shore of the lake. The overall scene is one of tranquility and natural beauty.

Little Deer Lake, Lac La Ronge Provincial Park



STRATEGIC PRIORITY:

MARKET SASKATCHEWAN'S TOURISM EXPERIENCES AND STORIES

Key Actions:

- Build on Saskatchewan's tourism brand through consistent and compelling marketing and communications initiatives
- Apply Saskatchewan's tourism market profiles to better target visitors and increase their expenditures
- Deliver targeted, branded content based on research, trends and consumer needs

Results:

CONTENT STRATEGY IMPLEMENTATION SIGNALS SWEEPING CHANGE

Tourism Saskatchewan received a 98-page recommendations report from Content Strategy Inc. (CSI) in March 2017. The recommendations outlined a clear path for transitioning from awareness-based, campaign-specific advertising to a digital-first focus

that puts fresh, compelling content on the channels most popular with target audiences.

A 14-member internal steering committee was created to oversee the implementation process. Committee members are a mix of managers and staff representing Marketing and Communications, eBusiness and Technology and Visitor Services. Their commitment to regular meetings throughout the year kept the process on track to meeting the desired timeline and goals.

Thirteen sub-committees addressed a wide range of responsibilities and specialized areas identified in the CSI report. Individual teams were formed to focus on website development; governance; technology infrastructure; research and measurement; operator listings criteria/data; content toolkit development; listings format and categorization; taxonomy; strategy and idea creation; editorial oversight; and additional topics.

Several key implementation milestones were reached in 2017-2018, the result of a co-ordinated, co-operative staff effort throughout the organization:

- **Governance:** New approaches to conducting business required organizational restructuring, with the most significant changes occurring in Marketing and Communications. Greater emphasis on digital content curation, collection and creation demanded changes in some job descriptions. A Content Creation Specialist was hired to focus on producing fresh, original content, supported by high-quality photographs and video footage. Equipment was upgraded to accommodate the role. Digital marketing positions were re-classified to address a broader scope and oversee responsibilities for Tourism Saskatchewan's online strategy.
- **Consumer website upgrade:** Improvements to TourismSaskatchewan.com included a new interactive map, advanced search capability, re-categorized and revised operator listings, and a new approach to vacation offerings. The user experience was redesigned to be more intuitive, deliver a greater response and move consumers along the path to purchase. Upgrades were introduced in stages, working toward an April 2018 launch of the site's new features and functionality.
- **Brand journalism training:** Brand journalism hinges on great storytelling. Editorial team members participated in training to build a "newsdesk" structure for planning, creating, reviewing and delivering compelling digital content.
- **Print literature research and changes:** Seven consumer focus groups were conducted to determine consumer demand for printed travel brochures. Findings revealed low usage and minimal desire for comprehensive, provincial-level travel guides. Based on this research, a decision was made to cease publication of listings-style printed guides and target resources toward materials that align with consumer interests.

- **Market persona training:** Cross-organizational training was undertaken to familiarize staff with Saskatchewan's key markets and the customer personas created for the three main visitor types:

Val, the Keeper of Family Memories

- Primarily from Saskatchewan and nearby Alberta
- Travels for the purpose of creating new family memories
- Revisits the same location every year
- Looks for new things to see and do in or around the family's favourite vacation spot
- Seeks information primarily through Facebook and Google search, with some consideration of destination websites and online reviews and recommendations

Scott, the New Experience Seeker

- Primarily from Alberta and Saskatchewan's two largest cities
- Rarely visits the same place twice
- Enjoys a wide variety of outdoor activities when travelling
- Travels for the purpose of discovering new experiences
- Enjoys interacting with locals
- Seeks information primarily through Facebook, YouTube and third-party publications, with some consideration of destination websites and e-newsletters

Chad, the Fishing Fanatic

- U.S. visitor
- Interested in big fish, the number of fish, the kinds of fish and spending time with friends and family while fishing
- Takes at least one fishing trip each year, often to a new destination where big fish are biting
- Seeks information primarily through Facebook and Google search, and fishing shows on YouTube or the Sportsman Channel

Throughout this 2017-2018 Annual Report, many key results reported under each strategic priority relate directly to the Content Strategy implementation.



While visiting Cree Lake Lodge, In-Fisherman TV made its biggest on-camera lake trout catch-and-release in the network's history - 23.5 kg (52 lb.), 114 cm (45 in.)

Promoting Saskatchewan's World-Class Fishing

The term "digital-first" became the mantra driving advertising initiatives in 2017-2018. Landing pages linked to significant angling content were created for the National Angling Program, a Destination Canada supported initiative. More than 28 million impressions were generated through online banner advertising, native advertising, social media channels and television content. Media partnerships brought Al Lindner Productions to experience fishing on Tobin Lake, and assisted In-Fisherman TV with a lake trout adventure at Cree Lake Lodge. The media visits yielded valuable content, distributed online through Carbon Media and the Outdoor Sportsman Group.

Tourism Saskatchewan's own advertising initiatives, in January-March 2018, were directed at anglers in key U.S. states. Texas was the primary online target, given research that identified the state as a market with growth potential and cited its sheer volume of anglers. The campaign's secondary focus was on 14 other states, strategically selected for residents' strong interest in fishing. Advertising initiatives (online, print and television) generated over 15 million impressions. Media partnerships involved Midwest Outdoors TV and Babe Winkelman

Productions. Within Canada, print advertising was used to entice Alberta anglers, and included placements in *Angler's Atlas*, the *Alberta Guide to Sportfishing Regulations*, and *Alberta Outdoorsmen Magazine*.

National Hunting Program

Tourism Saskatchewan participated in the National Hunting Program with Destination Canada and several provincial partners. Advertising in January-March to select U.S. targets generated over 8 million impressions. U.S. non-resident hunting licence sales numbers were used to identify states in which to promote white-tailed deer, bear and bird hunting. Media partnerships with Carbon Media, the Outdoor Sportsman Group and Ducks Unlimited yielded impressive content promoting Saskatchewan.

Advertising

In 2017-2018, targeted campaigns and marketing activities drove more than 1.4 billion impressions across channels that included traditional advertising, consumer and trade shows, online advertising, social media engagement and third-party travel influencers. These impressions influenced 4.82 million contacts made with Tourism Saskatchewan via telephone, face-to-face, live chat, social media activities and website visits.

Alberta/Saskatchewan Leisure Campaign

A spring 2017 leisure advertising campaign targeted key market segments in Alberta and Saskatchewan. Content created for the campaign matched the interests of these segments, which included groups of travellers described as "familiarity seekers" and "new experience seekers." Campaign landing pages linked to numerous blog posts showcasing Saskatchewan experiences. Articles highlighted features, such as attractive beaches, family-friendly camping spots, urban activities that appeal to kids, wilderness canoe experiences, and national and provincial parks.

The campaign generated over 26 million online impressions and more than 19 million impressions on television in Alberta. Saskatchewan numbers exceeded 10 million online impressions and 4.5 million impressions on television. Advertising on national television generated an additional 644,000 impressions.

In recall surveys, the advertisements were seen by 45 per cent of Albertans and 57 per cent of Saskatchewan residents. Online advertising outpaced traditional placement significantly, with 17 per cent of Albertans and 23 per cent of Saskatchewanians recalling the online messages, compared to 9 per cent and 12 per cent, respectively, who saw the advertisements on television or video.

Social Media

Tourism Saskatchewan's social media activities amplify the province's tourism brand and inspire consumers to act as brand advocates. All social media objectives were surpassed in 2017-2018. Audiences across Facebook, Instagram and Twitter grew 22 per cent to 243,228 followers, extending the reach of marketing activities in a cost-effective manner. Instagram continues to deliver the highest engagement rates, and dedicated efforts to expand that community resulted in a 29 per cent increase in followers, numbering over 40,000.



Generating third-party content aligned with the tourism brand was the focus of social media influencer campaigns. A project with four Saskatchewan fishing influencers resulted in the creation and sharing of compelling content featuring Saskatchewan's fishing and water-based tourism products.

Tourism Saskatchewan's partnership with Matador Network, the world's largest independent travel media company, yielded Saskatchewan content and stories that were shared across the network's channels. The relationship provides Tourism Saskatchewan and additional partners – Tourism Regina, Tourism Saskatoon and Parks Canada – with access to fresh material for populating social channels.

As recommendations of the Content Strategy were implemented, there was concentrated focus on creating blog posts, both internally and enlisting third-party bloggers, to enhance Tourism Saskatchewan's Facebook page, consumer website and *SaskSecrets* e-newsletter.

Co-operative Advertising Program

In its second year, the application-based Co-operative Advertising Program (CAP) involved 77 operators. The cost-shared provincial program supports partner activities that promote a tourism attraction, event or experience. Components included billboards, radio, television, print, online and social advertising. Tourism Saskatchewan provided over \$357,000 toward the campaign total of \$993,800, and was directly involved in online advertising via Google AdWords, Facebook and Twitter. Seventeen digital campaigns resulted in over 4.4 million impressions and more than 43,000 click-throughs to operator listings or packages on TourismSaskatchewan.com.

The option of partner-co-ordinated advertising was introduced to streamline the program. More than 60 per cent of approved applicants chose to co-ordinate all or part of their advertising activities. This shift in responsibility led to a number of efficiencies and empowered industry to have greater input into the finished product.

Consumer shows/marketplace support

Tourism Saskatchewan strategically tailored its consumer show attendance in 2017-2018 to three major shows: Safari Club International (Dallas), Minnesota Sportsmen's Show (St. Paul) and Northwest Sportshow (Minneapolis). These locations were chosen based on research identifying Texas and Minnesota as strong markets for promoting fishing and hunting.

Through the application-based Marketplace Fund, 53 Saskatchewan operators received support to attend 50 marketplace events in the U.S. and Canada. Successful proposals demonstrated alignment with Tourism Saskatchewan's target markets and strong product-market match. The total investment was approximately \$92,000.

Travel Media

Tourism Saskatchewan participated in three travel media marketplaces in 2017-2018: the Travel Media Association of Canada Conference, GoMedia Canada Marketplace and the Adventure Travel Trade Association's AdventureELEVATE, a new endeavour for Tourism Saskatchewan. The ELEVATE conference attracted North American travel media and influencers whose focus is on outdoor adventure experiences, a key product strength for the province.

The Travel Media Program assisted visits by 53 individual travel media and outlets, including 35 projects that promoted Saskatchewan's outfitted angling and hunting industries and 18 media visits that had a leisure travel focus. A partnership with *The Amazing Race Canada* included financial and planning support. The Saskatchewan episode was the highest rated television show in Canada on the night that it aired.

Travel Trade

Tourism Saskatchewan's work and partnerships involving the travel trade are central to promoting Saskatchewan internationally. Activities range from participating in key travel marketplaces to involvement in Destination Canada-led initiatives to developing new contacts in identified growth markets.

- The biennial Canada Specialist Program (CSP) Mega FAM (familiarization) tour, brought more than a dozen influential travel trade agents from Germany and the United Kingdom to Saskatchewan. The FAM provided them with firsthand knowledge and experiences in Prince Albert National Park and Saskatoon. The CSP is a Destination Canada initiative that engages travel agents and tour operators in Canada's key international travel markets. The program educates and builds in-market ambassadors for Canada.
- During Rendez-vous Canada 2017, Tourism Saskatchewan engaged in pre-scheduled business appointments with 140 travel trade buyers and media, representing key international markets. Tourism Saskatoon, the RCMP Heritage Centre, Lloyd Lake Lodge, Milton Lake Lodge and Wanuskewin Heritage Park were part of the Saskatchewan delegation.
- China is recognized as a lucrative travel market with significant potential for growth. Tourism Saskatchewan worked with B.C firm Doug Treleaven & Associates to gain access to top receptive tour operators (RTOs) serving Asian markets. In-person sales visits to 16 RTOs in Calgary and Richmond were conducted to begin establishing relationships and to introduce operators to Saskatchewan experiences and itineraries suitable for the Chinese market.



2017 ExploreSask Photo Contest Grand Prize winner, Dallas Hordichuk

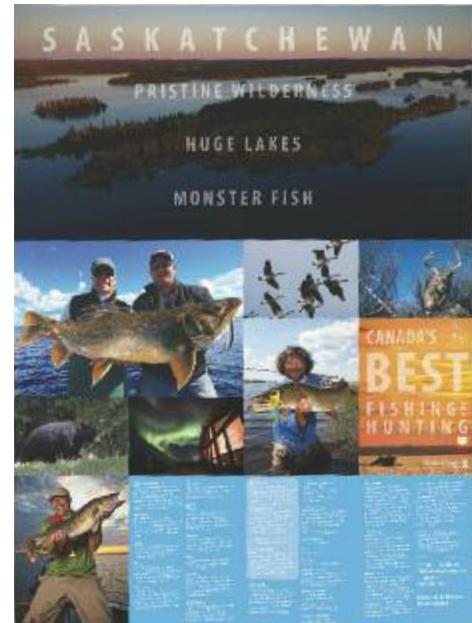
Print literature

Research confirmed declining consumer demand for printed provincial travel guides and increasing reliance on online resources for travel planning. Given this reality, Tourism Saskatchewan ceased publication of the annual *Saskatchewan Discovery Guide* and the *Saskatchewan Fishing and Hunting Guide*. A new promotional item, the 2018 *Saskatchewan Fishing & Hunting Map*, was created as a resource for Saskatchewan outfitters attending marketplace events. Colourful and compact, it features 146 outfitters plotted on the map of Saskatchewan, with the available species identified. The reverse side showcases impressive photography, and provides information on species, season dates, licensing details, and provincial regulations.

In preparation for the 2018 spring travel season, work began on a non-listings based consumer print resource to circulate at visitor information centres and other key distributors, such as hotels and airports. Content planning, drafting and preliminary design were completed in 2017-2018.

ExploreSask Photo Contest

The annual ExploreSask Photo Contest was launched during Saskatchewan Tourism Week. It was promoted on Tourism Saskatchewan's social media channels throughout the summer, and received over 2,000 entries by the September 15 deadline. Photo sharing, using the hashtag #ExploreSask, brought profile to the talented photographers, and broadened interest in the contest and in Saskatchewan travel experiences.





Downward Goat Yoga, Grotto Gardens Country Market, Maple Creek

STRATEGIC PRIORITY:

STRENGTHEN SASKATCHEWAN'S TOURISM EXPERIENCES

Key Actions:

- Assist operators and stakeholders in experience development that leverages Saskatchewan's tourism brand and aligns with market segments
- Build a strong tourism workforce through recruitment, training and retention products and services
- Enhance Saskatchewan's reputation as an event hosting destination of choice by supporting events that generate growth in visitor expenditures
- Champion a culture of quality with industry

Results:

EXPERIENTIAL TOURISM AWESHOPS INSPIRE NEW, HANDS-ON, AUTHENTIC TOURISM PRODUCTS

Tourism Saskatchewan's experiential tourism AWEshops engaged 55 Saskatchewan tourism operators, representing 37 industry partners, over the

course of the 18-month pilot project. Participants were introduced to innovative concepts that focus on the small details to create awe-inspiring guest experiences. In 2017-2018, fully immersive, two-day AWEshops were delivered to a group of Regina and area-based businesses, and to operators from central and northeastern Saskatchewan. AWEshop graduates remain in a working relationship with Product Development professionals to refine and finalize new or existing experiences. Outcomes of the program include five new offerings introduced into the market. Among these is the popular Downward Goat Yoga at Grotto Gardens Country Market in Maple Creek. New infrastructure was built to host yoga classes led by certified instructors, with added pet therapy. A five-day immersive "art in nature" experience, forestART, draws inspiration from the beautiful boreal forest at Ness Creek.

Eleven experiences are at various stages of development. Eight AWEshop participants have implemented business enhancements or improvements at their sites.

Product Development Strategy

In October 2017, Tourism Saskatchewan issued a Request for Proposals to design and lead a comprehensive process that would yield a product development strategy for Saskatchewan's tourism industry. The successful candidate was the Tourism Planning Group, the Canadian branch of TEAM Tourism Consulting, a global company that specializes in destination development, management and marketing. By December, the project was underway, with research and industry consultation slated for early 2018. The project will ultimately deliver the following:

- A vision for tourism growth in Saskatchewan
- A roadmap for the development of tourism products, experiences and services that meet the needs of travellers and can adapt to market trends
- Actions and recommendations that will position Saskatchewan's tourism sector as a key economic driver and a pillar for strengthening and diversifying the province's economy

Online Reputation Management

A continuing partnership with Vendasta, a leading online reputation management company, boosted the online profile of over 36 participating tourism businesses and enhanced Saskatchewan's reputation as an inviting tourism destination. Vendasta's easy-to-use platform enables operators to increase online visibility, engage with fans and followers, respond professionally to negative reviews and maximize positive endorsements. Six of the participating businesses engaged in a pilot project that paired an operator directly with a Vendasta digital agent to manage online reputation.

Online Learning Enhancements

A major service upgrade of the STEC online Learning Management System (LMS) was completed in early 2018. This upgrade replaced the previous system, store.industrymatters.com, with stec.skillbuilder.co. The new LMS platform improves access to training by operating on a greater range of devices in response to client needs. An effective, efficient "learning path" model eases the delivery of increasingly complex training methods and learning outcomes in an interactive online environment.

In response to increasing learner and client demand for online training, STEC continued to expand the

range of programs offered through its online learning environment. A new course was developed for Special Occasion Permit applicants, at the request of the Saskatchewan Liquor and Gaming Authority (SLGA). Existing courses received updates to reflect changes in learning outcomes, legislation and client requirements. Planning and development began for additional online courses.



Employer of Choice

Administered by STEC, the Employer of Choice program encourages businesses to engage in best practices, improve workplace culture and be leaders in the province's tourism sector. The program recognizes tourism employers who embrace human resource practices that make Saskatchewan a welcoming, service-driven destination. Employers of Choice attract and retain employees who are highly skilled, take pride in their work and provide exceptional service and experiences. Thirty tourism businesses and organizations earned the designation for 2018, an increase of 11 per cent over the previous year. This is the highest number of participants since the program was introduced in 2010. These Employers of Choice represent 16 Saskatchewan communities.



Ready to Work project, delivered in Regina

Ready to Work

A career awareness, skills development and transition to employment program, Ready to Work (RTW) – Tourism Careers assists individuals in finding long-term, rewarding careers in the tourism and hospitality sector. In 2017-2018, 155 individuals participated in the program, with 80 per cent obtaining employment or returning to school. Projects were hosted in Loon Lake, Meadow Lake, Onion Lake, Pelican Narrows, Regina and Shell Lake. More than 300 current and past participants were in contact with STEC to request assistance for resumé updates, housing, certificate upgrades, and other follow-up services.

Service First customer service training

A new introductory customer service workshop was developed by STEC, with input provided by an industry validation committee. Service First teaches basic skills and the attitude required by individuals in frontline tourism positions.

Customized training

STEC works with a wide range of employers to conduct needs assessments and develop customized training programs in tourism-related skills and occupations. Training addresses client needs, such as customer service, workplace occupational skills development (e.g. table service or retail sales techniques), workplace essential skills development (e.g. communication, teambuilding, conflict resolution), and risk management related to the sale and service of alcohol. In 2017-2018, STEC developed and delivered customized training programs at the request of eight employers.

Journeyperson training in tourism trades

STEC serves as the Industry Joint Training Committee for journeyperson programs in the Food and Beverage Person and Guest Services Representative trades, recognized by the Saskatchewan Apprenticeship and Trade Certification Commission (SATCC). During 2017-2018, 10 apprentices completed their journeyperson certification in these two tourism trades.

Hybrid Cook Apprenticeship, a three-year program, prepares candidates for Red Seal Journeyperson certification. Twelve apprentices completed Level 3, qualifying them to apply for certification.

STEC partnered with Saskatchewan Indian Institute of Technologies to deliver Guest Services Representative trade training, as part of the institute's new applied certificate program. Twenty-five participants enrolled during this first year of the program, which includes an industry practicum.



Serve It Right Saskatchewan

Since 1990, STEC has provided consistent training for the sale and service of alcohol, helping commercial permit holders to ensure that alcohol-related activities are conducted with integrity and in a socially responsible manner. Serve It Right Saskatchewan (SIRS), the province's official responsible service of alcohol program, was offered online in 2007. A three-year phase-in of mandatory training began in 2015, with a deadline of June 30, 2018 for completion of training by individuals involved in the sale and service of alcohol, including owners and managers. Training numbers have increased significantly as this date approaches. A total of 7,988 people completed training during 2017-2018 to comply with the new regulatory requirements.

Facilitator training

STEC continues to train and maintain a growing pool of facilitators with specific content expertise. In 2017-2018, facilitators were recruited with emphasis on regional representation for efficient co-ordination. Facilitator skills development training specific to the Ready to Work (RTW) program was introduced to improve service delivery to client and partner organizations. A total of 13 facilitators were recruited and trained for RTW, STEC programs and industry in-house training efforts.

Event Hosting Program

The eligibility of meetings and conventions to apply for funding (a change made in 2016-2017) added relevancy to the Event Hosting Program and opened doors for additional partnerships that position Saskatchewan favourably as a host destination. The enhancement helped to secure upcoming conferences, such as the 87th Annual Congress of the Humanities and Social Sciences, the 69th Annual International Commission on Irrigation and Drainage, and the 14th International Conference on X-ray Microscopy.

An adjustment was made to the Event Hosting Program's spring intake to provide better service to industry. An earlier deadline enabled greater efficiency and use of internal resources by aligning processes with the Co-operative Advertising Program.

In 2017-2018, 76 applications were received during two intake periods. Funding was approved for 33 events under the four program categories.

Community Annual Tourism Events

2017 Mid Summer's Art Festival* (Fort Qu'Appelle)	\$2,500
2017 Beaver Flat 50* (Saskatchewan Landing Provincial Park)	\$2,550
2017 Saskatchewan Highland Gathering & Celtic Festival* (Regina)	\$3,000
2018 Fire & Ice Winter Festival (Big River)	\$4,100
2018 Regina Restaurant Week (Regina)	\$5,000
2017 QCC Film Festival* (Regina)	\$5,000
Black Fox Farm and Distillery* (Saskatoon)	\$5,000
2017 Queen City Pride Festival* (Regina)	\$5,000
2017 All Folk'd Up Music Festival* (Montmartre)	\$5,000
2017 Broadway Street Fair* (Saskatoon)	\$5,500
2017 John Arcand Fiddle Fest* (Saskatoon)	\$15,000

Marquee Annual Tourism Events

2017 Regina Afrofest* (Regina)	\$4,000
2017 The Trial of Louis Riel (Regina)	\$5,000
2017 Nuit Blanche Saskatoon (Saskatoon)	\$5,000
2018 Winterruption (Regina and Saskatoon)	\$5,618
2017 Symphony Under the Sky at Motherwell Homestead* (Motherwell Homestead National Historic Site, Abernethy)	\$7,500
2017 Shakespeare on the Saskatchewan Festival* (Saskatoon)	\$10,000
2017 Northern Lights Bluegrass and Old Tyme Music Festival* (Big River)	\$15,000
2017 Ness Creek Music Festival* (Big River)	\$15,000

2017 RuBarb Summer Theatre Festival (Moose Jaw)

\$18,000

2017 Regina Folk Festival* (Regina)

\$20,000

2017 Country Thunder Saskatchewan* (Craven)

\$20,000

2017 Canadian Cowboys Association Finals Rodeo* (Swift Current)

\$20,000

National and International Tourism Events

2017 15U Volleyball Canada Championships*

\$10,000

2018 USport Women's Basketball National Championship*

\$20,000

69th Annual International Commission on Irrigation and Drainage – International Executive Council Meeting & Regional Conference (Saskatoon)

\$30,000

2018 Congress of the Humanities and Social Sciences (Regina)

\$30,000

2017 Canadian Country Music Awards (Saskatoon)

\$175,000

2018 Canadian Pacific Women's Open (Regina)

\$125,000

2018 MasterCard Memorial Cup (Regina)

\$350,000

Special Tourism Projects

Prairie Hunter – webisode series (Saskatchewan)

\$10,000

Fishing Saskatchewan

\$25,000

2017 History Alive! Vignettes* (Regina)

\$30,000

TOTAL

\$1,007,768

Economic impact models were used to determine the impact on the local economy during 20 events (identified by *). The models were updated to reflect the latest Statistic Canada input-output tables and were appropriate to the size of host communities. The economic analysis was calculated based upon the number of attendees, as provided by event organizers. Tourism Saskatchewan provided \$346,050 in funding, in 2016-2017 and 2017-2018, to 22 events that occurred in 2017-2018. These events supported over 145 jobs and delivered a gross output impact of \$10.7 million. The percentage of supported events that were able to provide final reports increased from 55 per cent in 2016-2017 to 76 per cent in 2017-2018. These 2017-2018 events generated a return of \$31 for every \$1 invested by Tourism Saskatchewan.

STRATEGIC PRIORITY: ENGAGE STAKEHOLDERS

Key Actions

- Deliver relevant information, programs and services based on research, trends and the tourism industry's needs
- Cultivate effective partnerships with key tourism stakeholders
- Work with stakeholders and government partners to ensure an environment conducive to tourism growth

Results:

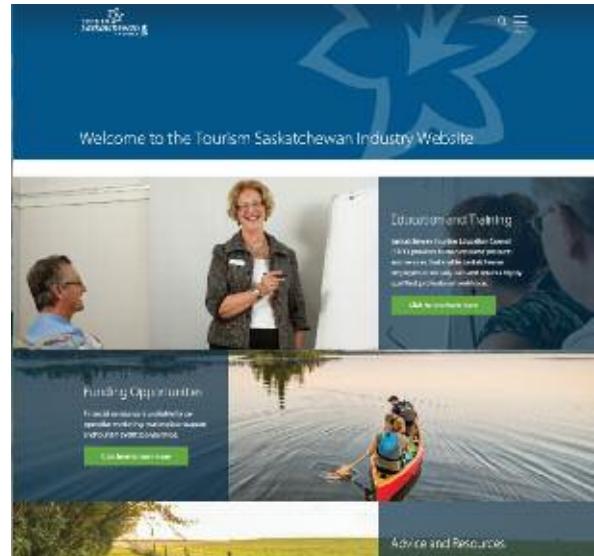
NEW INDUSTRY WEBSITE PROVIDES TOOLS AND RESOURCES FOR BUSINESS GROWTH

Tourism operators want fast, convenient access to tools and information that will help increase visitation, grow business, recruit and retain valuable employees, and more. To meet these demands, Tourism Saskatchewan conducted an extensive makeover of its longstanding IndustryMatters.com website. In-house review and restructuring began in January 2017, and the new and improved Industry.TourismSaskatchewan.com was launched in August.

The site provides industry with easy access to the following:

- Education and training products
- Information about programs and services offered by Tourism Saskatchewan
- Advice on how to improve tourism operations
- Details about funding programs, along with application forms

Visually, Industry.TourismSaskatchewan.com complements the consumer website, TourismSaskatchewan.com. Categories and pages are structured to enable users to search for information intuitively.



Up front, visitors can search three categories specific to the most common demands for information related to Education and Training, Funding Opportunities, and Advice and Resources. Menu items direct users to additional information and resources beneficial to tourism operators.

Going forward, upgrades will continue to enhance the site and improve functionality. Additional features, such as an industry login portal, will provide greater convenience and accessibility to more services.

Operator Engagement

A new operator engagement process was developed to familiarize tourism operators with visitor market profiles that represent key Canadian travel markets for Saskatchewan. Research undertaken in 2015 categorized visitors with strong interest in Saskatchewan under the following:

- Lakes and Locals (27 per cent of Canadian visitors to the province);
- Short-haul Suburbanites (26 per cent)
- Affluent Families (20 per cent)
- Minivans and Memories (7 per cent)

Tourism Saskatchewan's Product Development department worked closely with 10 Saskatchewan businesses. At least four incorporated the profiles into their immediate marketing strategies.

Local Food Trail

Tourism Saskatchewan collaborated with the Saskatoon Food Council and the Saskatoon Regional Economic Development Authority (SREDA) to assist a collective of Osler area food producers to formalize a joint marketing effort and create the self-guided Local Food Trail. A study conducted by SREDA was supported with statistical evidence and information provided by Tourism Saskatchewan. An online map was created, highlighting the route, operators and products.

Deep Dish Digital

A partnership with Deep Dish Digital, a Saskatchewan-based firm, expanded the suite of training programs on the new STEC Learning Management System to include internet marketing workshops. The first of three modules was completed in 2017-2018. Online availability of these tools provides operators with greater savings, access and convenience.

Cypress Hills Destination Area (CHDA) Strategic Planning

Tourism Saskatchewan supported a strategic planning process for the Cypress Hills Destination Area (CHDA). The partnership enabled the CHDA to hire an independent consultant to work with the board of directors and staff, and guide the creation of a five-year strategic plan.

HOST Saskatchewan Conference

The 2017 HOST Saskatchewan Conference, held in Saskatoon on April 5-6, 2017, welcomed approximately 150 representatives of tourism businesses, organizations, attractions and events from across the province. An impressive schedule of speakers and presentations addressed timely topics, ranging from Destination Canada's work in international markets to digital strategies that hit the mark and influence decision-making. The forum provided opportunities to update industry on Tourism Saskatchewan initiatives and share details about the comprehensive Content Strategy project and experiential tourism AWshops. Delegate feedback influenced planning for the 2018 conference and adoption of a day-long format.

Tourism Talks

The Tourism Talks series extended to two Saskatchewan communities in 2017-2018. Tourism Saskatchewan hosted more than 20 operators and representatives from the Carrot River area on June 8, 2017 at Pasquia Regional Park. Seventeen operators from Assiniboia and area gathered at the Assiniboia & District Historical Museum on March 15, 2018. Tourism Talks are designed to foster industry relationships and partnerships; support growth through education and collaboration; and increase awareness of local tourism products. Participant feedback is collected and contributes to program improvements and revisions to the schedule.

Tourism Workplace Leadership Conference

The second annual Tourism Workplace Leadership Conference provided a forum to inspire tourism workplace leaders – supervisors and managers in day-to-day contact with frontline staff – to adopt progressive HR strategies that would advance their businesses and enhance the tourism sector. Concurrent sessions addressed the conference theme of "Reaching Up – Coaching, Mentoring and Inspiring Others." Sixty-eight delegates attended the forum that offered innovative approaches to improving management styles, developing professional networks and meeting labour market challenges. The 24th annual Tourism Professional Recognition Dinner concluded the conference and celebrated the achievements of 45 *emerit*-certified professionals and 10 tourism journeypersons.



First Nations University of Canada Annual Spring Celebration Powwow

Saskatchewanderer

The partnership between Tourism Saskatchewan and the Ministries of Agriculture; Parks, Culture and Sport; and Trade and Export Development supported 2017 Saskatchewanderer Andrew Hiltz on his travels throughout the province. His successor, Kevin Dunn, hit the road in January 2018. The Saskatchewanderer program engages a full-time, four-season “ambassador,” whose discoveries are shared across social media and promote the many reasons why Saskatchewan is a great place to live, work and visit.

Saskatchewan Tourism Awards of Excellence

Tourism Saskatchewan organizes the annual Saskatchewan Tourism Awards of Excellence Gala and administers the online nomination process. The 28th annual gala was held in Saskatoon on April 5, 2017. A 15-person external panel selected the 33 finalists and 11 award recipients from 100 nominations.

Three Tourism Builders were honoured: Trent Fraser (Regina), Irene LeGatt (Saskatoon), and Steve McLellan (Regina). The Tourism Builder award honours individuals who have made significant and long-standing contributions to Saskatchewan’s tourism sector.

Saskatchewan Tourism Week

Saskatchewan Tourism Week was celebrated from May 28 to June 3, 2017, coinciding with Tourism Week in Canada. The week was officially proclaimed by the Government of Saskatchewan. More than 20 public events, held in communities throughout the province, brought profile to Saskatchewan’s tourism industry and encouraged residents to explore the wealth of tourism experiences “in their own backyard.”



STEC Partnerships

STEC exceeded its partnership objectives for 2017-2018, valuing its established or enhanced relationships with more than 20 businesses and organizations.

Saskatchewan Provincial Parks

STEC delivered customized training at 13 Saskatchewan provincial parks, almost tripling last year's participation. Training components included a WorldHost Fundamentals workshop for gate staff and a three-hour customized "Customer Service for Provincial Parks" presentation for all park employees. STEC continues to work with Saskatchewan Provincial Parks to implement customer service training as part of core training for new staff throughout the parks system.

Collège Mathieu

STEC works with Collège Mathieu to incorporate customer service training and *emrít* training resources into the college's new and existing French programming. French-speaking businesses, new Canadians, and individuals working in the tourism sector are the target markets for these programs.

Nutana Collegiate

Through a partnership with Ready to Work and Nutana Collegiate in Saskatoon, a one-year tourism program for high school students was developed. The program for Grades 10 to 12 is scheduled for introduction in the 2018-2019 school year.

Tourism HR Canada

STEC provided assistance to Tourism HR Canada in recruiting evaluators for SMART Accreditation, Canada's single national recognition model for tourism-related training programs. SMART Accreditation identifies programs that meet or exceed industry standards. It also provides benchmarks to measure success and determine areas for improvement. STEC was involved in promoting SMART Accreditation to Saskatchewan post-secondary institutions.

STRATEGIC PRIORITY:

NURTURE AN INTERNAL CULTURE FOCUSED ON EXCELLENCE

Key Actions:

- Foster a culture of continuous improvement and innovation based on a one-team approach
- Cultivate a values-driven work environment that inspires and empowers employees
- Optimize internal information sharing practices to enhance employee knowledge

Results:

Continuous Improvement

Tourism Saskatchewan co-ordinates continuous improvement activities through active committees that identify and address challenges both external and internal. Committee efforts in 2017-2018 involved strengthening communication with industry, through delivering Tourism Talks in Saskatchewan communities and investing in a comprehensive industry website makeover. Internal communication and process improvements included work on a staff SharePoint site to encourage dialogue, capture and nurture ideas, and ease improvement and change. The site will be piloted and launched in 2018-2019.

Recommendations from continuous improvement committees drove a number of projects involving technology and information systems. These efforts included remodelling and enhancing systems that support Tourism Saskatchewan's websites and internal business process. Outcomes of the work will include greater agility in online marketing efforts and improved online services to industry. A project timeline saw the completion of Phase 1 in 2017-2018, with work scheduled to continue throughout 2018-2019.

Strategic Planning

Tourism Saskatchewan's Strategic Plan 2018-19 – 2021-22 was approved by the Board of Directors. Plans, projects and activities for the 2018-2019 fiscal year align with priorities to:

- Market Saskatchewan's Tourism Experiences and Stories
- Strengthen Saskatchewan's Tourism Experiences
- Improve Destination Competitiveness
- Nurture an Internal Culture Focused on Excellence



Prince Albert National Park

Employee Engagement

Outcomes of the 2017 Employee Engagement and Culture Survey signalled the adoption of several new internal communication tools and methods. These worked in concert with established, effective channels, such as department and corporate-wide staff meetings. To align with Government of Saskatchewan practices, the survey will be conducted every two years.

Employer of Choice

Tourism Saskatchewan was awarded the Employer of Choice designation for the ninth consecutive year.

Celebrating Excellence

The third annual Tourism Superstar Awards were presented to employees who demonstrate significant contributions to excellence in the areas of teamwork, customer service, creativity and innovation, and leadership. Superstars are chosen through a peer nomination and selection process, and celebrated at an annual staff gathering.

PERFORMANCE MEASURES

The following Balanced Scorecard outlines the deliverables, performance measures, and targets to be met by Tourism Saskatchewan in accordance with the Strategic and Operational Plans.

Deliverable	Performance Measure	Unit	2015-2016	2016-2017	2017-2018
1. Marketing Results ¹	Total marketing partnerships with industry	#	1,731	1,719	3,336
2. Marketing Results ²	Total expenditure of industry partners involved in marketing activities	\$	1.07M	1.01M	.586M
3. Events	Tourism Saskatchewan expenditure on supported events	\$	1.15M	1.56M	1M
4. Events	Total industry partnerships in events supported by Tourism Saskatchewan	#	32	38	33
5. Training Delivery	Participants in training programs	#	5,550	7,084 ³	10,957
6. Product Development	Participants in training in online reputation management	#	-	40	65
7. Product Development ⁴	Quality Tourism Experiences	#	6 in development	18 in development; 4 in market	11 in development; 6 in market

Industry Outcomes	Performance Measure	Unit	2014	2015	2016	2017
A. Tourism Revenues	Total expenditures by travellers in Saskatchewan	\$	2.15B	2.15B	2.19B	2.37B
B. Visits	Visits both same day and overnight in Saskatchewan	#	12.5M	12.2M	12.38M	13.6M
C. Events ⁵	Total economic impact/# events reporting	\$/#	17.8M/13	28.8M/18	7.1M/21	10.7M/22
D. Employment	Number of individuals employed in a tourism-related profession	#	56,900	64,700	64,600	67,200

1. Total marketing partnerships with industry increased in 2017-2018 due to the cancellation of a listings-based print guide and offer of free online listings to tourism organizations and operators. The figure includes all organizations listing with Tourism Saskatchewan, other than communities.

2. Ceasing fees for listings in 2017-2018 resulted in a reduction in industry partnership funding. Only co-operative advertising and marketplace partnerships are included in the figure for 2017-2018.

3. Increase in training numbers, beginning in 2016-2017, is due primarily to mandatory responsible service of alcohol training by SLGA. The 2017-2018 total includes 10,807 individuals trained in various programs, plus 150 Ready to Work participants.

4. New program that began development in 2015-2016.

5. Economic impact calculated only on events able to report visits from outside the local area. The 22 events that reported occurred in 2017-2018. The percentage of events providing detailed reporting increased from 55 per cent in 2016-2017 to 76 per cent in 2017-2018.

FINANCIAL STATEMENTS

TOURISM SASKATCHEWAN

March 31, 2018



MANAGEMENT'S RESPONSIBILITY

To the Members of the Legislative Assembly of Saskatchewan:

Management is responsible for the preparation and presentation of the accompanying financial statements, including responsibility for significant accounting judgments and estimates in accordance with Canadian Public Sector Accounting standards and ensuring that all information in the annual report is consistent with the statements. This responsibility includes selecting appropriate accounting principles and methods, and making decisions affecting the measurement of transactions in which objective judgment is required.

In discharging its responsibilities for the integrity and fairness of the financial statements, management designs and maintains the necessary accounting systems and related internal controls to provide reasonable assurance that transactions are authorized, assets are safeguarded and financial records are properly maintained to provide reliable information for the preparation of financial statements.

The Board of Directors and Audit Committee are composed entirely of Directors who are neither management nor employees of Tourism Saskatchewan. The Board is responsible for overseeing management in the performance of its financial reporting responsibilities, and for the approval of the financial information included in the annual report. The Audit Committee has the responsibility of meeting with management and external auditors to discuss the internal controls over the financial reporting process, auditing matters and financial reporting issues. The Audit Committee is also responsible for recommending the appointment of Tourism Saskatchewan's external auditors.

MNP LLP, an independent firm of Chartered Professional Accountants, is appointed by the Lieutenant Governor in Council to audit the financial statements; their report follows. The external auditors have full and free access to, and meet periodically and separately with, both the Audit Committee and management to discuss their audit findings.

May 30, 2018



Chief Executive Officer



Chief Financial Officer

AUDITORS' REPORT

To the Members of the Legislative Assembly of Saskatchewan:

We have audited the accompanying financial statements of Tourism Saskatchewan, which comprise the statement of financial position as at March 31, 2018 and the statements of operations, changes in net financial assets and cash flows for the year then ended, and a summary of significant accounting policies and other explanatory information.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian Public Sector accounting standards, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements present fairly, in all material respects, the financial position of Tourism Saskatchewan as at March 31, 2018 and the results of its operations, changes in net financial assets and its cash flows for year then ended in accordance with Canadian Public Sector accounting standards.

The logo for MNP LLP, featuring the letters "MNP" in a stylized, italicized font followed by "LLP" in a smaller, regular font.

Regina, Saskatchewan

Chartered Professional Accountants

STATEMENT OF FINANCIAL POSITION

As at March 31

	2018	2017
FINANCIAL ASSETS		
Cash (Note 5)	\$3,127,401	\$2,846,778
Accounts receivable	393,158	450,220
Inventory for resale	637	4,808
	3,521,196	3,301,806
LIABILITIES		
Accounts payable and accrued liabilities	1,194,996	1,110,645
Unearned revenue	236,597	134,284
	1,431,593	1,244,929
NET FINANCIAL ASSETS	2,089,603	2,056,877
NON FINANCIAL ASSETS		
Tangible capital assets (Note 6)	803,936	983,499
Prepaid expenses	138,083	232,556
	942,019	1,216,055
ACCUMULATED SURPLUS	\$3,031,623	\$3,272,932

Contractual Rights (Note 7)
 Contractual Obligations (Note 8)
 Designated Assets (Note 9)

See accompanying notes to financial statements.

APPROVED BY THE BOARD:



Director



Director

STATEMENT OF OPERATIONS

For the Year Ended March 31

	Budget 2018 (Note 3)	2018	2017
REVENUE			
Provincial Operating Grant (Note 10)	\$13,445,000	\$13,445,000	\$13,737,000
Other Grants and Contributions	1,510,000	1,192,925	1,512,446
Sales of Products and Services	868,830	608,146	774,973
Partnership	515,000	460,344	571,190
Interest and other	71,200	87,498	120,291
	16,410,030	15,793,913	16,715,900
EXPENSES (Schedule 1)			
Administration	4,347,342	4,118,399	4,054,580
Marketing	6,746,431	6,751,763	7,186,267
Industry Development	2,369,233	2,465,449	3,038,211
Education and Training	2,477,704	2,095,227	2,352,144
Visitor Services	769,320	604,384	932,036
	16,710,030	16,035,222	17,563,238
(DEFICIT) FOR THE YEAR	\$(300,000)	\$(241,309)	\$(847,338)
Accumulated surplus - beginning of year	3,272,932	3,272,932	4,120,270
Accumulated surplus - end of year	\$2,972,932	\$3,031,623	\$3,272,932

See accompanying notes to financial statements.

STATEMENT OF CHANGES IN NET FINANCIAL ASSETS

For the Year Ended March 31

	Budget 2018 (Note 3)	2018	2017
(Deficit) for the year	\$ (300,000)	\$ (241,309)	\$ (847,338)
Acquisition of tangible capital assets	(625,000)	(44,914)	(88,989)
Amortization of tangible capital assets	455,000	224,477	219,541
	(470,000)	(61,746)	(716,786)
Use of prepaid expenses and supplies	-	94,472	37,223
Increase (decrease) in net financial assets	(470,000)	32,726	(679,563)
Net financial assets - beginning of year	2,056,877	2,056,877	2,736,440
Net financial assets - end of year	\$1,586,877	\$2,089,603	\$2,056,877

See accompanying notes to financial statements.

STATEMENT OF CASH FLOWS

For the Year Ended March 31

	2018	2017
OPERATING ACTIVITIES		
(Deficit) for the year	\$ (241,309)	\$ (847,338)
Items not requiring cash:		
Amortization of tangible capital assets	224,477	219,541
Net change in non-cash balances relating to operations:		
Accounts receivable	57,062	19,910
Inventory	4,171	(3,847)
Prepaid expenses	94,473	37,223
Accounts payable and accrued liabilities	84,350	(191,118)
Unearned revenue	102,313	(136,191)
	325,537	(901,820)
CAPITAL ACTIVITIES		
Acquisition of tangible capital assets	(44,914)	(88,989)
	(44,914)	(88,989)
Increase (decrease) in cash	280,623	(990,809)
Cash - beginning of year	2,846,778	3,837,587
Cash - end of year	\$3,127,401	\$2,846,778

See accompanying notes to financial statements.

NOTES TO THE FINANCIAL STATEMENTS

March 31, 2018

1. STATUS OF TOURISM SASKATCHEWAN

Tourism Saskatchewan was established pursuant to *The Tourism Saskatchewan Act* proclaimed on July 1, 2012. Tourism Saskatchewan is a Treasury Board Crown Corporation within the meaning of *The Crown Corporations Act, 1993*. Tourism Saskatchewan is a continuing corporation of Saskatchewan Tourism Authority, established under *The Tourism Authority Act* on October 1, 1994. Tourism Saskatchewan promotes the province as a tourism destination by providing in-province and out-of-province marketing and visitor services. Tourism Saskatchewan assists industry to market and develop quality tourism products through co-operative marketing, education and training and event funding programs.

Tourism Saskatchewan is exempt from income taxes under the *Income Tax Act*.

2. SIGNIFICANT ACCOUNTING POLICIES

The Statement of Remeasurement Gains and Losses has been omitted as there were no relevant transactions to report.

a. Basis of Accounting

These financial statements are prepared by management in accordance with Canadian public sector accounting standards for provincial reporting entities established by the Canadian Public Sector Accounting Board.

b. Measurement Uncertainty

The preparation of financial statements in conformity with Canadian public sector accounting standards requires management to make estimates and assumptions that affect the reporting amounts of assets and liabilities, and disclosure of contingent assets and liabilities, at the date of the financial statements and the reported amounts of the revenues and expenses during the period. Items requiring the use of significant estimates include accounts receivable, accrued liabilities and amortization.

Estimates are based on the best information available at the time of preparation of the financial statements and are reviewed annually to reflect new information as it becomes available. Measurement uncertainty exists in these financial statements. Actual results could differ from these estimates.

c. Cash

Cash is comprised of monies on deposit and is recognized at their fair value. Fair value is approximated by the instrument's initial cost in a transaction between unrelated parties.

d. Inventory for Resale

Inventory for resale is valued at the lower of cost and net realizable value. Cost of merchandise is determined principally on a first-in, first-out basis. Inventory cost includes the costs of purchase plus other costs, such as taxes and transportation that are directly incurred to bring inventories to their present location.

e. Non-financial Assets

Non-financial assets are not available to discharge existing liabilities and are held for use in the provision of services. They have useful lives extending beyond the current year and are not intended for sale in the ordinary course of operations.

NOTES TO THE FINANCIAL STATEMENTS

March 31, 2018

f. Tangible Capital Assets

Tangible capital assets are recorded at cost, which includes amounts that are directly related to the acquisition, design, construction, development, improvement or betterment of the assets. Cost includes overhead directly attributable to construction and development, as well as interest costs that are directly attributable to the acquisition or construction of the asset. Tangible capital assets are amortized over their estimated useful lives. Amortization expense is calculated using the straight-line method at the following annual rates:

Furniture and equipment	10%
Computer equipment	20%
Leasehold improvements	10% or lease term
Signs and displays	10%
System Development	10%

When tangible capital assets no longer contribute to Tourism Saskatchewan's ability to provide goods and services, they are written down to residual value.

g. Revenue

Grants and contributions are recognized as revenues when the grant or contribution is authorized, any eligibility criteria are met, and reasonable estimates of the amounts can be made, unless the transfer stipulations establish a liability, in which case revenue is recognized as the stipulations are met.

Other revenue, which includes partnership, sales of products and services and interest revenue, is recognized in the period in which the transactions or events occurred that give rise to the revenue.

h. Grants to Clients

Grants provided to clients for a variety of programs are recorded as an expense by Tourism Saskatchewan when it approves the transfer and the recipient meets the eligibility criteria.

i. New Standards and Amendments to Standards

The following new standards and amendments to standards, effective for annual periods beginning on or after April 1, 2017, have been analyzed in preparing these financial statements.

- PS 2200 Related Party Disclosures
- PS 3420 Inter-Entity Transactions
- PS 3210 Assets
- PS 3320 Contingent Assets
- PS 3380 Contractual Rights

The adoption of these standards and changes to standards has no material impact on the Tourism Saskatchewan financial statements.

3. BUDGET

The budget figures are presented for comparison purposes. Tourism Saskatchewan's 2017-18 budget was approved by the Board of Directors on February 15, 2017.

4. FINANCIAL INSTRUMENTS

Tourism Saskatchewan's financial instruments include cash, accounts receivable, accounts payable, accrued liabilities. The carrying amount of these instruments approximate fair value due to their immediate or short-term maturity. These instruments do not have significant interest rate or credit risk.

NOTES TO THE FINANCIAL STATEMENTS

March 31, 2018

5. CASH

Tourism Saskatchewan has access to an operating line of credit in the amount of \$500,000, repayable on demand with interest paid monthly, at the Scotiabank prime rate less 0.25%. As of March 31, 2018, Tourism Saskatchewan has not drawn on the operating line. In 2017, there were no draws on the operating line.

6. TANGIBLE CAPITAL ASSETS

	Furniture and equipment	Computer equipment and systems	Leasehold improvements	Signs and displays	2018 Total	2017 Total
Cost						
Opening Balance	\$243,657	\$1,863,314	\$1,295,310	\$75,596	\$3,477,877	\$3,393,204
Additions	-	44,914	-	-	44,914	88,989
Disposals	-	-	-	-	-	(4,316)
Write-downs	-	-	-	-	-	-
Closing Balance	243,657	1,908,228	1,295,310	75,596	3,522,791	3,477,877
Accumulated Amortization						
Opening Balance	191,416	1,306,948	969,633	26,381	2,494,378	2,279,153
Amortization	6,291	83,218	129,531	5,437	224,477	219,541
Disposals	-	-	-	-	-	(4,316)
Write-downs	-	-	-	-	-	-
Closing Balance	197,707	1,390,166	1,099,164	31,818	2,718,855	2,494,378
Net Book Value	\$45,950	\$518,062	\$196,146	\$43,778	\$803,936	\$983,499

7. CONTRACTUAL RIGHTS

Tourism Saskatchewan has three contractual agreements in place at March 31, 2018, which outline funding to be received over the next three years for the delivery of training services.

Revenues in each of the next three years are estimated as follows:

2018-19	\$1,027,860
2019-20	1,087,015
2020-21	205,000
	\$2,319,875

8. CONTRACTUAL OBLIGATIONS

Contractual obligations include:

Leases

Tourism Saskatchewan has entered into leases for office premises and storage space at various locations in the province.

Operational

Tourism Saskatchewan has operating agreements that enable day-to-day operations of the corporation.

NOTES TO THE FINANCIAL STATEMENTS

March 31, 2018

Program

Tourism Saskatchewan has program-related obligations to assist Saskatchewan's tourism industry operators to market and develop quality tourism products through co-operative marketing, education and training and event funding programs.

	Leases	Operational	Program	Total
2018-19	\$ 698,316	\$ 64,106	\$ 377,597	\$1,140,019
2019-20	603,426	27,967	90,000	\$ 721,393
2020-21	628,138	27,788	95,000	\$ 750,926
2021-22	630,352	27,360	-	\$ 657,712
2022-23	630,352	-	-	\$ 630,352
thereafter	1,313,233	-	-	\$1,313,233
	\$ 4,503,817	\$ 147,221	\$ 562,597	\$5,213,635

Contractual obligations do not include those contracts which are paid on a usage basis.

9. DESIGNATED ASSETS

Tourism Saskatchewan is holding \$300,000 as designated assets to be spent on the marketing program in future years (2017 - \$300,000).

10. PROVINCIAL OPERATING GRANT

Tourism Saskatchewan receives grants from the General Revenue Fund out of monies appropriated by the legislature or authorized by Order in Council. In 2018, Tourism Saskatchewan received \$13,445,000 (2017 - \$13,737,000).

11. RELATED PARTY TRANSACTIONS

Included in these financial statements are transactions with various Saskatchewan Crown corporations, ministries, agencies, boards and commissions related to Tourism Saskatchewan by virtue of common control by the Government of Saskatchewan and non-Crown corporations and enterprises subject to shared control by the Government of Saskatchewan (collectively referred to as "related parties").

Routine operating transactions with related parties are settled at prevailing market prices under normal trade terms. These transactions and amounts outstanding at year end are as follows:

	2017-18	2016-17
Accounts Receivable	\$92,968	\$38,150
Accounts Payable and Accrued Liabilities	57,501	53,505
Other Revenue	354,724	571,002
Expenses	1,417,335	1,374,043

Other related party transactions are disclosed elsewhere in these financial statements.

12. DEFINED CONTRIBUTION PENSION PLAN

Tourism Saskatchewan participates in the Public Employees' Pension Plan (PEPP), a defined contribution plan. Tourism Saskatchewan's obligations are limited to matching contributions made by the employees, at a rate of 7.5%, for current services. In 2018, Tourism Saskatchewan contributed \$430,679 (2017 - \$455,821).

SCHEDULE OF EXPENSES

Schedule 1 - Expenses by Program For the Year Ended March 31

	Administration	Marketing	Industry Development	Education and Training	Visitor Services	2018	2017
Salaries	\$1,674,742	\$2,010,242	\$924,399	\$798,296	\$377,989	\$5,785,668	\$6,139,948
Benefits	302,219	306,297	144,540	126,669	71,069	950,794	1,018,393
Professional Services	522,049	174,233	214,600	785,240	59,289	1,755,411	1,944,759
Advertising	-	2,893,967	-	148	-	2,894,115	2,763,629
Promotion and Other Marketing	22,395	916,198	303,400	1,404	81,470	1,324,867	1,801,736
Print	(6)	58,652	2,275	12,707	-	73,628	229,307
Travel	15,898	136,230	38,830	25,093	4,740	220,791	253,466
Board and Committees	29,317	-	-	-	-	29,317	31,436
Rent and Equipment Purchases	865,682	1,949	-	7,992	6,846	882,469	922,057
Supplies and Services	381,536	58,361	27,507	16,367	2,362	486,133	366,844
Other Related Business Expenses	80,089	26,596	63,195	19,374	619	189,873	244,517
Amortization	224,477	-	-	-	-	224,477	219,541
Grants	-	169,038	746,704	301,937	-	1,217,679	1,627,605
Total	\$4,118,398	\$6,751,763	\$2,465,450	\$2,095,227	\$604,384	\$16,035,222	\$17,563,238



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