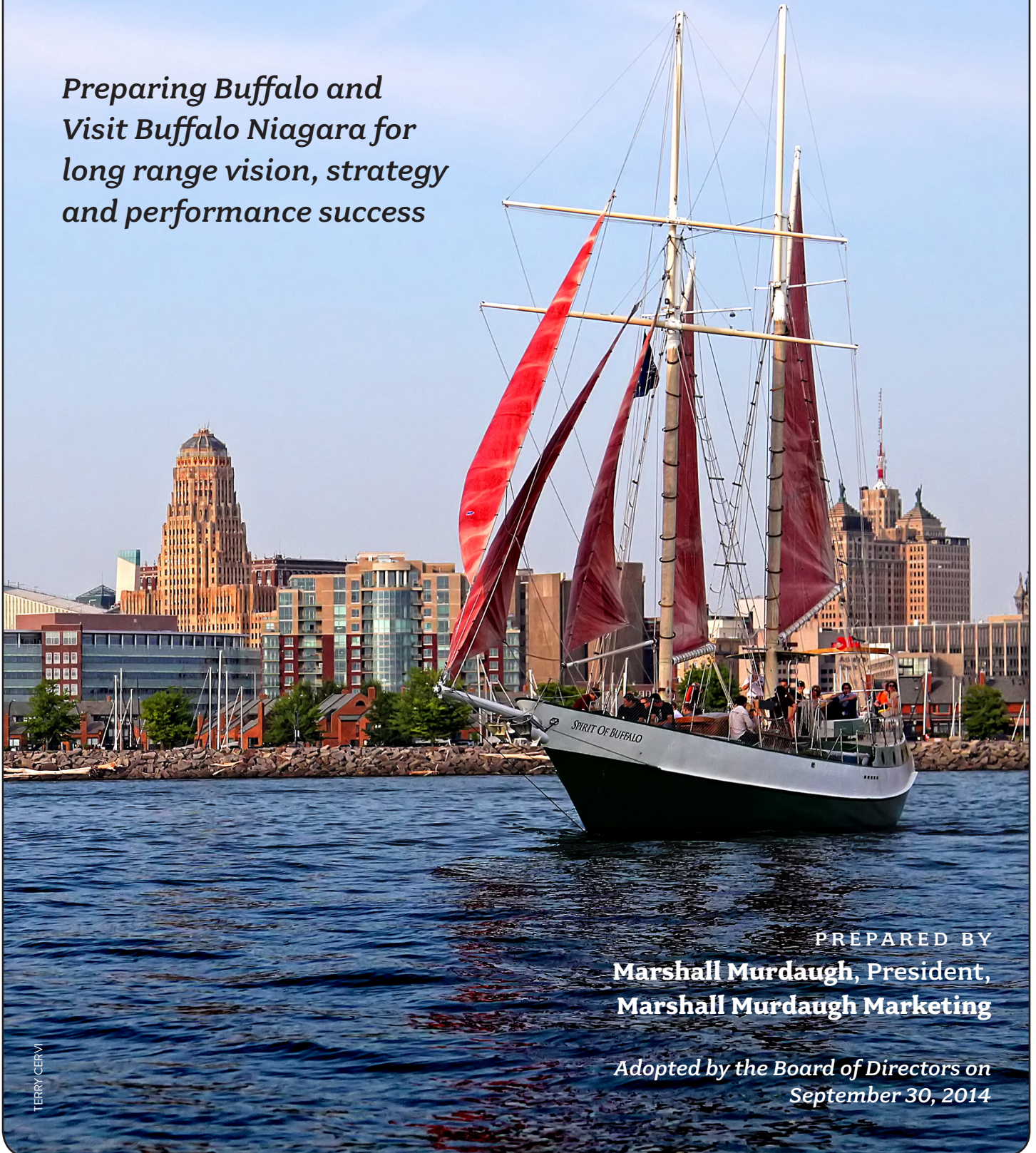




2015-2020 Strategic Plan

*Preparing Buffalo and
Visit Buffalo Niagara for
long range vision, strategy
and performance success*



PREPARED BY
**Marshall Murdaugh, President,
Marshall Murdaugh Marketing**

*Adopted by the Board of Directors on
September 30, 2014*



Dear Visit Buffalo Niagara Stakeholder:

We are pleased to share with you our new Visit Buffalo Niagara five year strategic plan to help chart a productive future course for Buffalo Niagara and its tourism industry. Marshall Murdaugh, President, Marshall Murdaugh Marketing in cooperation with Ralph Thompson President and Chief Brain of eBrains, Inc. were hired to facilitate the strategic planning process including: industry surveys, performance comparison, input sessions and a planning session with the VBN board of directors and senior staff. Murdaugh Marketing and eBrains analyzed tourism related statistics in addition to research of the current and pending development taking place in Buffalo and Erie County. The following pages reflect their independent expert analysis and council for VBN's future plans to market, sell and promote our destination.

If you were among the many stakeholders who participated in this process with we want to personally thank you for your candid observations and recommendations. They helped create the development of more than thirty pages of new opportunities in this plan that will assist in assuring Buffalo Niagara's tourism success for the years ahead.

These are truly exciting times for our destination. Area visitor receipts hit an all-time annual high in 2012, with the latest estimates totaling \$1.567 billion dollars in tourism economic impact for Erie County—a 5.1% increase over the prior year—while also supporting 28,909 local jobs and producing visitor state and local tax revenues estimated at \$192 million dollars. In 2013, Erie County Bed Tax Revenue reached an all-time high in collections of over \$9.7 million.

As your official destination marketing organization, Visit Buffalo Niagara is equipped with best business practices, goal-based planning and the growing support from government and hundreds of community stakeholders. We're truly excited and energized to be launching this ambitious plan, because it couldn't come at a more propitious time as a new wave of renewed optimism continues throughout the city and region.

We encourage your continued participation and thank you for your support as we collaboratively work together to assure the brightest future ahead.

Dennis P. Murphy
Chairman, Board of Directors

Patrick J. Kaler
President & CEO

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The Strategic Planning Process

Creating this plan involved a number of key steps and inputs, highlighted by the perceptions, insights and recommendations from numerous Visit Buffalo Niagara (VBN) stakeholders and partners.

- **A diagnostics assessment** of current VBN marketing and management programs and documents was conducted by strategic planning consultant, Marshall Murdaugh, who also compiled plan inputs from stakeholders, provided additional strategic recommendations and then produced the initial draft of this plan.
- **An internet-based stakeholder perception survey** by noted performance management consultant Wil Brewer, President of Performance-Solutions-Group, was conducted to garner opinions from community partners.
- **A series of focus group discussions** conducted by Marshall Murdaugh. President of Marshall Murdaugh Marketing, Inc. and Ralph Thompson, President and Chief Brain of eBrains, Inc., provided additional insights from major business and community participants and VBN staff to identify current community strengths, weaknesses, challenges and resulting opportunities for long range success.
- **Individual meetings were also taken with senior community leadership** to gain directional information and recommendations.
- **The board of directors met to review and frame** other management and operational requirements, including review of the organizational mission, cascading objectives, and new governance opportunities.
- **Destination marketing industry trends** were reviewed and noted following review of the Organizational Profile Study of destination marketing organizations (DMOs) from the Destination Marketing Association International and their latest strategic planning *Futures Study*.
- **Finally, board and staff members provided their collective vision** for the new Visit Buffalo Niagara of the future.

As these sessions and inputs were provided, principal strategic opportunities were listed and prioritized followed by numerous others for future consideration. Major recommendations are noted throughout, and include manpower and financial resource requirements and suggested timelines for implementation when feasible.

Readers should consider this report an evolving process that will be modified and enhanced by VBN over the months and years ahead as plans are addressed and additional steps are taken to bring new initiatives to fruition. Following board review and approval of this plan and its recommendations, the staff can begin the task of determining scheduling and planning steps that support other planning needs and requirements.

Special Thanks to the Plan's Participants

Visit Buffalo Niagara Board of Directors

Dennis P. Murphy, VBN Board Chairman, President, InnVest Lodging Services, Inc.
Patrick J. Kaler, President & CEO, Visit Buffalo Niagara
Dottie Gallagher-Cohen, President & CEO, Buffalo Niagara Partnership
Randall Kramer, Artistic/Executive Director, MusicalFare Theatre
Kerry C. Mitchell, County-Appointed Representative
Minesh Patel, General Manager, Adam's Mark Buffalo
Edward A. Rath, III, Erie County Legislature
Mary F. Roberts, Executive Director, Martin House Restoration Corporation
James T. Sandoro, Executive Director, the Buffalo Transportation Pierce Arrow Museum
Paul Snyder III, CEO, Snyder Corp.
Maria Whyte, Commissioner, Department of Environment & Planning, County of Erie
Leslie H. Zemsky, Director of Fun, Larkin Square

Key community leadership meetings

County Executive Mark C. Poloncarz, County of Erie
Maria Whyte, Commissioner, Department of Environment & Planning, County of Erie
Dennis P. Murphy, VBN Board Chairman and President, InnVest Lodging Services, Inc.

Marketing Committee focus group

Jill Clark, Assistant Project Manager, Erie Canal Harbor Development Corporation
Brittany Frey, Director of Marketing, Alliance Advisory Group
Dave Horesh, Regional Sales Manager, Block Club
Jennifer Kavanaugh, Director, Marketing & Communications, Buffalo Niagara Enterprise
Ben Kirst, Content Strategist, Quinlan and Company
Joe Lin-Hill, Deputy Director, Albright Knox Art Gallery
Andy Major, Vice President, Event Operations & Guest Experience, Buffalo Bills
Kathleen Rooney, PR Strategist/Publicist/Counselor, Kathleen Rooney Communications
Margaret Stehlik, Director of Operations, Martin House Restoration Corp.

Sports Commission focus group

Rick Aronberg, Head Swim Coach/STAR Swimming, Erie Community College
Brad Boyle, Natatorium Manager, Erie Community College
Mike Buczkowski, General Manager, Buffalo Bisons Baseball
Peter Jerebko, Director of Athletics, Erie Community College
John Lambert, Director of Development and Marketing, University at Buffalo
Thomas Marks, New York Director, GR8 Lakes Fishing Adventures
Bob Schell, USA Hockey, Northtown Center
Lisa Scherer, Manager/Operations, Ride for Roswell, Roswell Park Cancer Institute

Timm Slade, Executive Director, Section VI/NYSPHSAA

Chris Todorov, Events Manager, NFTA Boat Harbor

Suburban Hotel focus group

Philip Alterio, Director of Sales, Buffalo Niagara Marriott

Peter Florczak, General Manager, Buffalo Niagara Marriott

Rene Ganje, Director of Sales, Byblos Niagara Resort and Spa

Thomas Keane, Regional Director of Sales, Hart Hotels

Rudi Rainer, Owner, Super 8 Motel

Nicholas Salvatore, Director of Sales, Salvatore's Italian Gardens & Garden Place Hotel

Scott Swagler, General Manager, Byblos Niagara Resort and Spa

Downtown Hotels and Convention Center focus group

Mark Brown, Corporate Director of Sales and Marketing, Buffalo Lodging

Missy Byrne, Sales Manager, Embassy Suites Buffalo

Jay Dellavecchia, General Manager, Hyatt Regency Buffalo

Kelly Fox, Sales Manager, Adam's Mark Hotel

Julia Hay, Sales Manager, Adam's Mark Hotel

John Malkus, Director of Sales, Hyatt Regency Buffalo

Melissa Murphy, Director of Sales and Marketing, Buffalo Niagara Convention Center

Paul Murphy, Facility Director, Buffalo Niagara Convention Center

Matthew Spencer, General Manager, Comfort Suites Downtown

Visit Buffalo Niagara Senior Staff focus group

Patrick Kaler, President and CEO

David Marzo, Chief Financial Officer

Mike Even, Vice President of Sales and Services

Ed Healy, Vice President of Marketing

Cindy Kincaide, Director, Buffalo Ambassadors Program

Judy Smith, Director of Administration

Paul Murphy, Facility Director, Buffalo Niagara Convention Center

Pete Harvey, Director of Sports Development

Lori White, National Sales Manager

Karen Fashana, Marketing Manager

Plan Highlights: Major Findings and Opportunities

In 2013, operating with a staff of twenty-six and a budget of \$4.4 million dollars, Visit Buffalo Niagara's marketing initiatives produced an estimated \$181 million dollars in new visitor expenditures, including \$105 million from attendees at meetings, conventions, amateur athletic events and group tours, for the community—a return on marketing investment of approximately 40-to-1—one of the DMO industry's highest economic impact performance results.

As of July 2014, future bookings through the year 2018 from meetings, conventions, amateur athletic events and group tours will attract an estimated 87,000 attendees which is expected to generate in excess of \$ 92 million dollars in future economic impact for the region.

A major billion dollar era of development will occur in Buffalo in less than two years when a number of new capital improvements will be completed as this renaissance continues to generate increased enthusiasm for the community.

Utilizing the development taking place in Buffalo with the Medical Campus, HarborCenter and Canalside project and new hotel development, VBN has the opportunity to explore new niche markets such as medical tourism, expand existing amateur athletic sporting opportunities while exploring new strategies for domestic and international leisure visitation.

The challenge will be providing a Visit Buffalo Niagara marketing response that is capable of producing top of mind consumer awareness, which can achieve higher volumes of visitors and resulting economic benefits.

Buffalo Niagara requires a shared vision for tourism's emergence as an even more viable economic force through the new tourism initiative advanced by County executive Mark C. Poloncarz, "...to make Erie County the international tourism destination it should be."

The key factor for Buffalo Niagara in maximizing long term tourism success must be the ongoing spirit of community and stakeholder collaboration.

VBN should convene the Buffalo Niagara Tourism Summit, a special community forum featuring the national leaders of the most prestigious travel and tourism organizations to see first-hand the ongoing plans that will elevate Buffalo Niagara as a new destination of choice for future travel markets.

A New Tourism Master Planning process for Buffalo Niagara, including visitor readiness components such as way-finding and other signage, streetscapes, etc., should be integrated in future community master planning to foster this new era of opportunity for the community, its residents and visitors.

New research opportunities will produce a much-needed profile of Buffalo Niagara's leisure visitor market, and offer new convention and meeting opportunities, amateur sports

opportunities and expanding international in-bound markets that will optimize the VBN's ability to generate even higher incremental business returns for the future.

Developing Buffalo's tourism brand identity and brand promise for travelers will further differentiate the destination from other competitors through supportive community participation capable of achieving greater industry results.

Customer awareness and interest in the Buffalo Niagara tourism brand can best be attained through new travel journalist familiarization and other public relations/media publicity programs that support the entire Buffalo Niagara tourism business community.

The Profile of the Successful DMO

Destination Marketing Organization = DMO

This brief profile provides the principal attributes of the successful convention and visitors bureau, and assesses how Visit Buffalo Niagara emulates this model for excellence.

According to leading destination marketing experts, industry performance standards and findings from more than ninety consultant destination studies, there are basically three major areas or success criteria, which when taken collectively, provide generally recognized standards for evaluating today's successful DMO, also known today as a destination marketing organization.

Criterion I:

The DMO delivers performance of economic development benefits in fulfilling its core mission

First, DMO productivity results, or "economic impacts" from the performance marketing work of the DMO are based on the attraction of incremental visitors through various market segments, including meetings, conventions and amateur athletics. These results are:

- Quantifiable
- Forecast whenever feasible in advance as a series of goals
- Reportable to business leadership, stakeholders and other community constituents

Visit Buffalo Niagara exceeds the industry's performance model for delivering, monitoring, evaluating and reporting the significant performance productivity it delivers for the community. In 2013, VBN booked nearly 165,000 room nights, through 443 meetings/conventions, sporting events and group tours. In the same year, the VBN website had over 1.3 million unique visitors.

Criterion II:

The DMO provides marketing, management and operational excellence through its financial oversight, market research and market planning, business execution and evaluation steps.

As such, VBN strives to deliver the highest standards of performance in the areas of

- Economic impact results against market segments
- Successfully planned, designed and executed marketing initiatives and a business standard marketing plan
- Reporting and accountability systems
- Long and short-term planning
- Performance goal-setting, tracking and delivery

- Staff and program performance evaluation, professional staff development and employee compensation and recognition
- Community partnership and alliance-building to galvanize tourism industry interests, stretch resources and leverage success.

This is the core work of the successful DMO under the direction of the/President, and the most well regarded employ best business practice standards in their management systems.

In this regard, Visit Buffalo Niagara emulates this criterion through its best business practices, its models for long and short range business planning and the quantifiable and qualitative matrix of innovative program results it delivers on behalf of Buffalo. However, while performance success has been stellar and exceeds the results of most DMOs, there are current needs to ameliorate mistaken stakeholder perceptions regarding the value of the organization and the substantial benefits it achieves.

Criterion III:

The DMO is the recognized leader in the community for effective tourism development

On the surface, this last criterion may appear to be extremely subjective. However, the DMO's assessment should be impartially made by asking all of its diverse stakeholders to address and evaluate their relationships with the agency.

Today's DMO should be well regarded for its local leadership position. Stakeholders (i.e. hotels, attractions, art and cultural institutions, related businesses and other associations, government, etc.) should look to the DMO as the focal point for destination marketing, strategic tourism planning, coordinating community stakeholder efforts, research and long range visioning.

In other words, through leadership of the Board of Directors and the CEO, the DMO's role is that of the voice of the industry, the inspiration, the visionary, the chief lobbying organization and the chief cheerleading organization. DMO board leadership should assist in closely monitoring and managing key long range strategic planning issues affecting the destination such as the need for competitive market funding, infrastructure requirements, branding, visitor amenities and service issues.

Through its ongoing strategic planning programs and constituent input, Visit Buffalo Niagara continues to nurture its ongoing relationships with government and industry; the new leadership of the President/CEO has been recognized and welcomed by the business community. Utilizing the President/CEO's vast industry and educational background and leadership within national tourism associations, VBN is recognized as a leader locally, regionally and nationally. The board of directors and CEO should rely on these strengths to continue building positive relations with County and City government and the local tourism industry as the destination continues its renaissance over the next five years through industry meetings, community

presentations and panel participation, visitor readiness, customer service and front line training, newsletters and communications, etc.

Reviewing Buffalo Niagara's Strengths, Weaknesses, Opportunities and Challenges

A series of six focus groups attended by key leaders were held during the week of May 12, 2014.

Individual sessions included the VBN board of directors, sports commission, the VBN marketing committee, downtown hotels/convention center participants, suburban hotels and VBN senior staff. Each session employed a traditional SWOC assessment process as stakeholders provided their perceptions regarding community strengths, weaknesses, challenges and opportunities. Individual meetings with senior community leadership provided additional insights. Then the inputs from each session were incorporated in this collective listing, offering current observations about Buffalo Niagara's tourism industry.

STRENGTHS

Buffalo's community and VBN strengths are multi-faceted, fueled by optimism and a shared vision for a productive and bright future. Comments from the focus groups include:

- Buffalo Niagara is the recipient of recent national accolades as a top destination for international visitors, one of America's five underrated cities, a top turnaround town and one of the *New York Times* "44 Places to Go".
- Tourism leaders concur that if a traveler hasn't been to Buffalo recently, they haven't really been to Buffalo. This is because the community's tourism personality has rapidly emerged in such positive ways, with bustling new restaurants, a high density of artistic and cultural amenities including one of the world's best art collections, sports, special events and now hundreds of millions of dollars in new development projects culminating in 2016. Buffalo has become a truly genuine and authentic destination.
- This new billion dollar renaissance approaching includes ongoing reinvigoration of Buffalo's Inner Harbor and the Erie Canal park projects that will transform the waterfront, new hotels, indoor and outdoor ice rinks, new school, hospital and business facilities plus added retail, restaurants, and office space.
- This phoenix-like development can also be Buffalo's greatest catalyst for new economic growth through tourism.
- Resultantly, there is a growing optimism from residents that the community is becoming more energized, more invigorated and capable of great things.
- For first-time visitors, Buffalo is a major surprise, with the city out-delivering against initial consumer expectations.
- Visit Buffalo Niagara has achieved high levels of performance through its skilled and tenured staff—highlighted by social media and digital marketing that is among the top programs in the industry.

- Government and industry understand that the business of tourism marketing is working for the community, producing resulting economic impact results that benefit everyone.
- When convention meeting planners, travel writers and group tour planners come and experience Buffalo through the work of the VBN, there is positive reinforcement for the community's ability to host higher future volumes of visitors that provide a vital engine of economic development through tourism expenditures, resulting tax revenue and local jobs generated by increased visitor spending.
- The nearby natural wonder and tourism magnet of Niagara Falls, along with two major Great Lakes highlight our waterfront assets and favorable location to Canada, and proximity to Toronto and Southern Ontario.
- Other strengths are the sports venues such as the Northtown Center, and Lake Erie and the Niagara River as some of the top fisheries in the country.
- Being on the border of Canada provides Buffalo an international context and distinction not shared by many.
- Buffalo combines the old and the new through its architecture, rich history and opportunities for new development, including a great diversity of visitor amenities and trip purposes; shopping, professional and amateur sports, conferences and meetings, culture, arts and special events for the leisure market.
- Because Buffalo residents are friendly and passionate about their community, they make great ambassadors when welcoming visitors and their base for volunteerism is strong.
- Communication between the Sports Commission and the VBN are strong and supportive, providing ongoing opportunities for leveraging resources and programs
- Higher educational opportunities are here in abundance, with an estimated 125,000 college students.
- A convenient location and ease of accessibility, Buffalo is easy to get around. Once you're here, everything is just minutes away.
- The quality of life is high, including a great mix and diversity of sports, culture, arts.
- Buffalo is an affordable destination, providing a great cost/value relationship for visitors.
- Offering four seasons of special things to see and do, and highlighted by special events year-round.
- Easy to get passport (same day)
- Buffalo has developed a cool vibe that younger visitors connect with.
- The restaurant scene is unique and special, and its owners have a deep passion and love for what they do.
- Travel is enriched in the community due to the collaborative relationships between the community, suppliers, and vendors.

WEAKNESSES

The weaknesses that impede successful progress for Buffalo Niagara were noted:

- The VBN has been underfunded for marketing for more than a decade, making it difficult to effectively compete in the tourism marketplace against a growing list of successful competitive destinations.
- As a result, there is relatively low top of mind consumer awareness of Buffalo's visitor amenities; its facilities and services that make it such a special visitor destination. It is this missing first step of visitor *awareness* that must be expanded in order to lead to customer *interest* and *desire* to final *action* that generates new visitors.
- The Convention Center is one of America's oldest and outdated, making it a liability in attracting meetings, conventions and other business. Nearby boarded up buildings are a deterrent as well the general condition of downtown—with limited retail, restaurant hours on the weekend are not ideal, Main Place Mall and back of Statler are sore spots.
- Airport – limited direct flights beyond east coast destinations, and mostly on regional jet service, including no nonstop service to Albany.
- The hotel package is far from ideal for meetings and conventions, with groups having to use 3, 4+ hotels.
- Weather perceptions are a major deterrent to visitation.
- There are also out of date but lingering media stereotypes to overcome in portraying the city's vitality and reputation as an emerging new visitor product.
- A lack of downtown retail.
- Distance from vibrant neighborhoods to hotels is an impediment.
- Hotel conditions / quality.
- The lack of adequate local navigational way-finding signage that could brand the community through the diversity of its facilities and amenities.
- Local media that points out the negatives more than the positive stories because that's what makes the news.
- Lack of public transit.
- Community planning is missing for cross-promotion of visitor assets.
- A general deficiency in master planning, particularly in tourism development.
- From a college perspective, it is tough to show students what there is to do in the city, there is a lack of awareness and a poor image of what facilities are here, and what kind of impact they have.
- Lack of media appreciation for amateur sports and their positive impact, nor is there a full understanding of area and their capabilities.
- There are funding issues: it is tough to keep existing facilities we have up to date and competitive due to lack of budget to do so.

- Difficulty competing with the budgets of larger sports organizations such as the Bills and Sabres.
- Lack of integrated indoor facilities with ability to travel under roof and compete during the cold seasons as other competitors.
- A lack of ice to host indoor and outdoor events such as skating and pond hockey. Limited funding for event solicitation compared to other competing communities who have major budgets to buy events.
- The confusing permitting process should be streamlined. There are issues between certain venues and the city/government, many duplicate applications required for customers that makes the process redundant. Nor is there clarity about which group should govern which space.

CHALLENGES

The challenges or impediments affecting the community and VBN were then listed:

- Leadership – Determining what role Government (State, County and City) plays in tourism development and marketing.
- There is general Buffalo pessimism among older residents.
- Aging facilities/venues/convention center with lack of capital improvement plans.
- Keeping young people here post-college is problematic.
- Money continues to move to the suburbs.
- Lingering suburban concerns and fears about visiting Buffalo.
- Overcoming old misperceptions and cynicism that Buffalo isn't a viable visitor destination requires diligence in marketing and communications.
- Some community unwillingness to embrace the positive change.
- Lack of local awareness of new positive developments here today and the visitor experience now provided by Buffalo.
- Creating effective public/private partnerships.



Stakeholders' Survey

Summary overview, results and themes



MANAGING for **SUCCESS!**

Performance-Solutions-Group, LLC
1127 High Ridge Road, #266, Stamford CT 06905

May 2014

Survey Overview

Performance-Solutions-Group, Inc. conducted a stakeholder perception survey with participants requested to provide frank and objective feedback about the way in which Visit Buffalo Niagara is serving them as stakeholders.

❑ Survey Objectives:

- To obtain essential feedback and input from stakeholders to guide the decision-making of the Visit Buffalo Niagara leadership team and Board;
- To identify issues and problems that need to be addressed
- To send a message to stakeholders that their opinions are valued

❑ Rating Scale:

We used a 1 - 5 scale to rate the statements made in the survey. The rating system used was as follows:

5	Exceptional
4	Exceeds expectations
3	Meets expectations
2	Below expectations
1	Failing

Based on input from the many surveys we have conducted, the following guidelines provide a frame of reference for interpreting the results:

> 4.6	Exceptional
4.4 – 4.6	Excellent
4.0 – 4.3	Strong
3.5 – 3.9	Satisfactory
3.0 – 3.4	Less than satisfactory
2.5 – 2.9	Weak
< 2.5	Some serious problems
N/A	Score not shown since less than three datapoints

❑ Response Rate:

- Approximately 803 individuals were invited to participate in the survey.
- There were 98 responses.
- This represents a response rate of approximately 12%. This is a little disappointing in relation to a more typical response rate of +- 20% and as high as 25%.

Nevertheless, a response of 98 is a valid sample and the scores show a high level of consistency across the various groups. Responses by type of business were as follows:

Primary Business	Combined Total	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Associations	Others
<i>Number of Respondents</i>	98	16	7	20	12	3	5	5	30

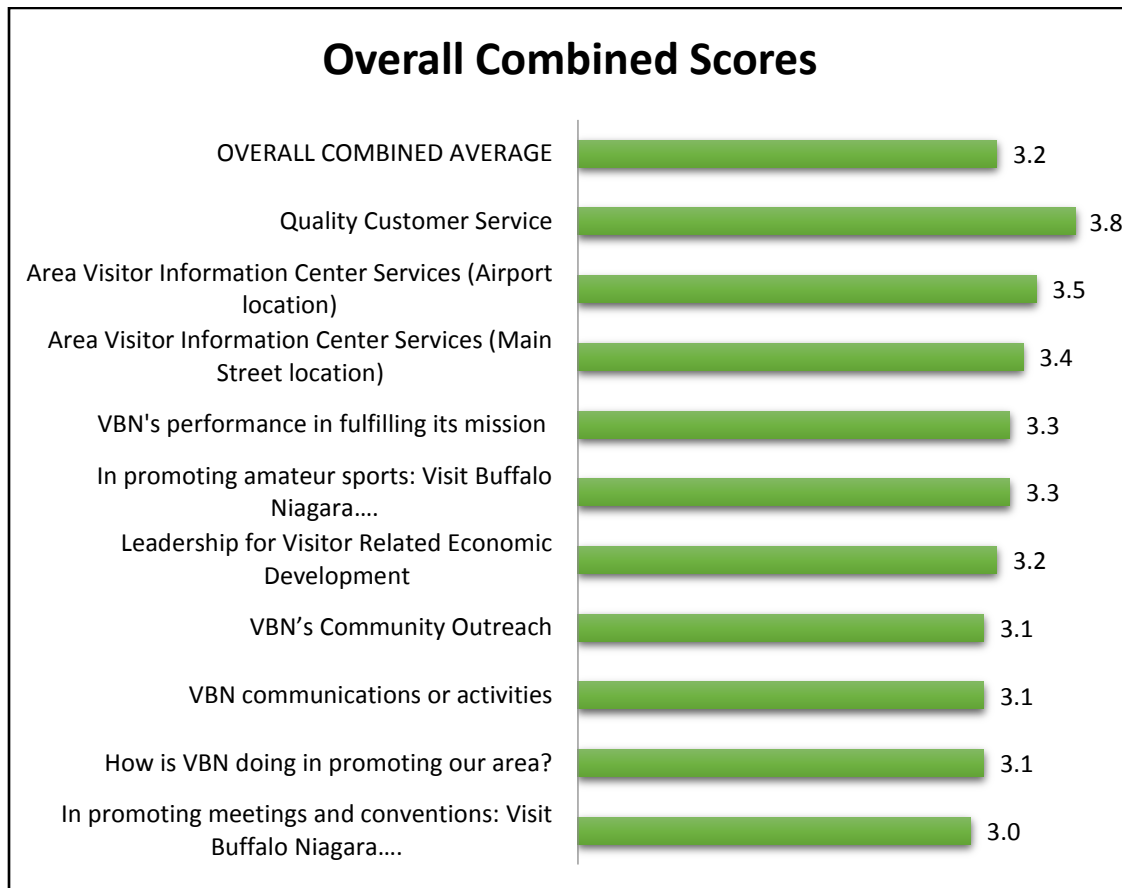
Notes:

- **Eleven** of the ninety-eight respondents were board members.
- The “Other” column is comprised of responses from a wide range of sectors but with insufficient datapoints for each to warrant separate identification in the reported data. Refer Appendix 1 for the listing of business sector responding.

The responses broken out by location were as follows:

Location	Combined Total	Downtown	Other
<i>Number of Respondents</i>	98	45	53

❑ **Summary Results by Category:**



Summary Results and Themes

Table 1 – Summary by Primary Business										
Category	Comb	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Assns.	Other	Board
Number of Responses	98	16	7	20	12	3	5	5	30	11
Quality Customer Service	3.8	3.5	4.1	3.7	3.8	4.4	4.4	3.8	3.9	4.1
Area Visitor Information Center Services (Airport location)	3.5	3.6	3.8	3.5	3.3	3.3	4.2	3.4	3.4	3.9
Area Visitor Information Center Services (Main Street location)	3.4	3.4	4.1	3.4	3.0	3.7	4.0	3.3	3.3	3.3
VBN's performance in fulfilling its mission	3.3	3.0	3.2	3.2	3.4	3.3	3.2	3.5	3.4	3.6
In promoting amateur sports: Visit Buffalo Niagara....	3.3	3.2	3.4	3.2	3.5	3.5	2.9	4.1	3.4	3.6
Leadership for Visitor Related Economic Development	3.2	3.0	3.2	3.5	3.1	3.0	3.3	3.4	3.2	3.4
VBN's Community Outreach	3.1	2.8	3.0	3.2	2.8	2.9	2.9	3.6	3.2	3.6
VBN communications or activities	3.1	2.8	3.3	3.1	3.0	3.2	3.6	3.3	3.2	3.5
How is VBN doing in promoting our area?	3.1	2.8	3.2	3.1	3.1	3.1	2.9	3.6	3.2	3.4
In promoting meetings and conventions: Visit Buffalo Niagara....	3.0	2.7	2.8	2.9	3.2	3.0	2.8	3.4	3.1	3.4
Overall Combined Average	3.2	3.0	3.4	3.2	3.2	3.3	3.3	3.6	3.3	3.5
Overall Satisfaction with Visit Buffalo Niagara (One line rating)	3.3	2.9	3.3	3.2	3.4	3.0	3.3	4.0	3.4	3.8

Importance of publications and website	3.4	3.3	3.6	3.2	3.2	3.4	3.5	3.2	3.7		3.7
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❑ **Comments on Summary Results (Table 1):**

- The overall combined average is 3.2, just below midway in the unsatisfactory range.
- The score of 3.5 from the eleven board members is at the start of the satisfactory range.
- The line item score for Overall Satisfaction with Visit Buffalo Niagara (VBN), a single line rating, is marginally higher than the Overall Combined Average. However, there are some major disconnects within the sectors identified, including the board score for overall satisfaction at 3.8 versus the board overall average of 3.5.
- Quality of Customer Service is the highest scoring category at a high 3.8, just above midway in the satisfactory range, followed by Area Visitor Information Center Services (Airport) at 3.5, the bottom of the satisfactory range.
- The lowest category score is low at 3.0 (Bottom of unsatisfactory range) for promoting meetings and conventions:
- The next lowest category scores are identical for three of them:
 - VBN's Community Outreach
 - VBN communications or activities
 - How VBN is doing in promoting our area?
- Local Associations score the VBN highest at 3.6, in the lower portion of the satisfactory range, followed by Hotels (limited service) at 3.4. Other sector scores are clustered from 3.2 to 3.3.
- Highest line item scores are shown in the table below. It is concerning that only one score is in the strong category at 4.0 and that there are few scores higher than 3.5, the bottom of the satisfactory range. It is noteworthy that most relate to the quality of customer service, the highest scoring category.

Table 2: Highest Scores by Line Item	Comb	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Assns.	Other		Board
Quality Customer Service: Courtesy	4.0	3.8	4.1	3.7	4.0	N/A	4.3	4.0	4.1		4.4
Quality Customer Service: Overall Customer Service	3.9	3.6	4.1	3.7	3.9	N/A	4.3	3.8	4.0		4.3
Quality Customer Service: Knowledge	3.8	3.6	4.1	3.6	3.8	N/A	4.5	3.8	3.8		4.0
Area Visitor Information Center Services (Main Street location) Professionalism of staff	3.8	3.9	4.4	3.8	3.4	4.0	4.5	3.8	3.7		3.7
Quality Customer Service: Accuracy	3.8	3.4	4.1	3.6	3.8	N/A	4.5	3.8	3.8		3.9
Table 2: Highest Scores by Line Item Continued	Comb	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Assns.	Other		Board
Area Visitor Information Center Services (Main Street location)	3.8	3.8	4.4	3.7	3.1	4.3	4.5	3.8	3.6		3.7

Quality of customer service										
Quality Customer Service: Timeliness in response	3.7	3.2	4.1	3.7	3.4	N/A	4.5	3.8	3.7	3.9
Is effective in bringing amateur sports to our area	3.7	3.2	3.7	3.7	4.0	3.7	3.2	4.3	3.8	3.9
Importance of Area Visitors Guide	3.6	3.3	3.7	3.4	3.4	3.7	3.5	3.8	3.8	3.9

- There were many combined scores in the unsatisfactory and weak ranges. The lowest scores are shown in the table below. The lowest scores in the weak range are substantiated by many of the comments from respondents and reflected in the survey themes in the full report. Some of the weakest scores are from Hotels.

Table 3: Lowest Scores by Line Item	Comb	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Assns.	Other	Board
Has the appropriate facilities to attract meeting and convention (M&C) business	2.4	2.3	1.8	2.5	2.7	N/A	2.4	2.0	2.4	2.5
Promoting packaged vacations	2.6	2.2	2.6	2.5	2.7	3.0	2.8	N/A	2.9	2.8
Area Visitor Information Center Services (Main Street location) Suitability of location	2.7	2.7	3.6	2.7	2.5	2.7	3.3	2.5	2.4	2.4
Staff visits to your business	2.8	2.5	2.4	2.7	2.5	3.3	2.7	3.3	3.1	3.0
Marketing and promoting the region to international individual travelers	2.8	2.6	3.2	2.8	2.8	2.7	2.5	N/A	2.9	3.0
Marketing and promoting the region to overseas inbound groups	2.8	2.8	3.0	2.9	2.8	2.7	2.5	N/A	2.7	3.0
Convention calendar	2.8	2.4	3.1	2.8	2.9	N/A	3.3	3.0	2.9	3.1
Helping to create jobs	2.9	2.6	2.9	2.9	2.6	3.0	3.0	3.4	3.0	3.3

Table 3: Lowest Scores by Line Item Continued	Comb	Hotel (full service)	Hotel (limited service)	Arts & Culture	Attractions	Entertainment	Restaurants	Local Assns.	Other		Board
Developing opportunities for cooperative marketing and advertising with partners	2.9	2.4	3.0	2.6	3.0	3.7	2.8	N/A	3.1		3.2
Through paid advertising in magazines, newspapers and TV	2.9	2.3	3.2	3.0	2.9	3.0	2.8	N/A	3.0		3.2
Seeking out and attracting new visitor markets	2.9	2.4	3.1	2.9	2.8	N/A	2.3	3.3	3.2		3.1
Extending visitor stays through Visitor Information Centers	2.9	2.9	3.2	3.0	2.9	N/A	3.0	3.8	2.7		3.4
Participation in roundtables and other problem-solving forums	3.0	2.7	2.8	3.1	2.5	3.0	3.0	3.8	3.1		3.6
Creates business opportunities for the tourism industry by bringing meetings and conventions to the area	3.0	2.8	2.7	2.9	3.3	N/A	2.8	3.3	3.2		3.5
Partners effectively with attractions in providing additional activities for attendees	3.0	2.9	3.2	2.8	3.0	3.0	2.8	3.7	3.2		3.5
Partners effectively with the tourism industry in serving meeting planners	3.0	2.7	3.0	2.9	3.3	3.3	3.4	3.3	3.1		3.6
Works effectively with the hotel community in developing M&C business	3.0	2.7	3.2	3.1	3.3	N/A	2.8	3.7	3.1		3.3

❑ **Positive Themes and Comments:**

Many of the comments in response to the open-ended questions and following each of the categories were thoughtful and constructive and merit consideration.

- In response to the question: Is the VBN recognized as the leader of the area's visitor industry? Out of the 60 responses, 45 responded yes, 8 gave No answers and 7 were unclear or unsure.
- Examples of positive comments are:
 - VBN does an excellent job with the limited resources that it has. Many of their issues are tied to funding -or-- more accurately the lack of proper public and private sector financial support.
 - Considering budget constraints, outstanding results.
 - VBN has demonstrated a strong commitment, and a viable effort towards attracting visitors.
 - One of VBN's greatest contributions in recent years has been its consistently excellent graphic/visual presence.
 - VBN does a very good job with attracting and servicing sporting events to the area.
 - A great team.
 - Outstanding staff.
 - Cyndi Kincaide, Karen Cox, and Tracey Martell....all outstanding!
 - A great group of people that know a LOT about WNY!!
- The staff members at the downtown visitor information center are competent.
- The VBN does a great job with their partners and groups coming in.

❑ **Comments of Concern:**

There were clear negative themes with regard to the following.

- **Difficulties in attracting conventions with the current facility and hotel capacity:**
 - Not enough hotel room capacity for large conventions and conferences.
 - The hotel and conference facilities are inadequate to host a conference of 800 or more attendees, and the city is not considered a draw.
 - A smaller convention center allows only one major event in the building at a time, limits conventions due to local trade shows in the building.
 - The convention center is outdated and undersized.
 - We could attract bigger and better conventions with a newer Convention Center.
- **Lack of communication to stakeholders:**
 - Better communication is needed to let the community know what VBN is doing.
 - It is important for more communication and the need for more information shared on a regular basis.
 - Communicating the impact VBN has on the local economy is important and is lacking.
 - The great work most often goes unnoticed except for Board members close to operations.
- **Need to improve marketing and promotional activities:**
 - The VBN needs to promote businesses/attractions outside of Erie County more effectively. Get people to stay another day.
 - There appears to be little promotion of area attractions to out-of-town visitors.
 - There is limited visibility in the region.
 - The perception problem requires marketing, branding and content.
 - The budget for this is too low.
 - The negative perceptions of Buffalo need to be addressed.
 - There is an undue focus on attracting Canadian visitors.
- **More impact needed on local business:**
 - Not enough is done to promote local cooperation and planning to capitalize on visitor events.
 - Some see limited evidence of VBN's efforts impacting local business. "If they were to go away today, I doubt it would be noticed."
- **Inadequate website:**
 - The website is complicated and lacks consistent updates and relevant information regarding organizations and events. "Frankly, it's a boring site that lacks accessibility."
 - The website needs to be user friendly and up to date.

- Younger ideas are needed for fresh insights into use of technology and social media.
- **Insufficient funding:**
 - More funding is required to enable the VBN to provide quality services and be an economic stimulus for the region.
 - “VBN needs more funding, which we fully support, to become exceptional in all areas.”
 - More communication is required to increase the level of public education, outreach, and awareness, necessary to obtain support for increased public funding.
 - “Funding, funding, funding.”
- **Visitor information center issues:**
 - The information center is in wrong location.
 - “No visitors here except if lost; location is still in a dead part of downtown.”
 - The location needs to be visible to visitors unfamiliar with the downtown area.
 - The location needs to be in an area where visitors spend time when downtown in the City.
 - The information center at the airport is difficult to find and may be in the wrong area with poor signage.

MAJOR OPPORTUNITIES

Eighteen priority opportunities, which comprise the center piece of this plan, are recommended in detail, followed by a general listing of additional issues for ongoing discussion and future consideration.

Industry Relations: Reporting and Accountability

1. Strengthen tourism partnerships and resulting collaboration by implementing a comprehensive, ongoing industry relations/partnership initiative that corrects misperceptions regarding VBN performance and other issues from the stakeholder survey.

While the VBN staff has worked effectively to produce extremely high levels of annual performance productivity for the community, low scores in the stakeholders survey support the conclusion that there are major challenges in effectively communicating the DMO's role in fulfillment of its mission as a significant engine of economic development and promoting the area amidst pockets of misunderstandings that require immediate attention and amelioration.

Throughout America's corporate business community, where shareholders drive the future, the public relations/public affairs function has been appropriately elevated to a senior management role, and this responsibility should be an important requisite for the VBN as well. In fact, this public relations, or public affairs function should be everybody's job—from the entry-level position to the President/CEO.

Recommendation: The responsibility for public affairs should be included as a personal performance objective for the President and all senior staff, with day to day functional responsibilities assigned to a senior staff member who reports directly to the CEO. With a new CEO, the opportunity for a new public affairs/industry relations plan is present and should be developed and implemented.

Industry relations development

The objective should be development of an ongoing industry relations plan to foster productive communication, understanding, good will, support and when feasible, participation in tourism as a significant social and economic program for the community, through the mission of the VBN.

The plan should be developed in the spirit of industry and stakeholder collaboration. It should focus on the four principal publics of stakeholder, local media, government and industry relations, with the first priority being stakeholder relations.

Stakeholder relations: priority tasks

1. The initial task should be the assignment of the senior staff as a stakeholder relations task force, to review the entire stakeholder survey, and then plan communications and program responses to effectively address and ameliorate all current misunderstandings.
2. Following development of the senior staff's recommended plan and its detailed components and timelines, the task force should review their conclusions with the entire VBN staff for additional input.
3. The next step should be senior staff review with the President.
4. CEO would present the plan to the board for implementation, which should later become an integral part of the annual marketing plan.

Opportunities to be considered should include

- **The introduction of new business communications messaging** regarding the VBN mission, its objectives, its marketing process, the value of its work and ongoing results, along with new market data that is useful for stakeholders such as visitor market studies, etc. Also review other competitive internal publications, including newsletters.
- **An ongoing series of roundtables** by major business segments (hotel sales/marketing, tourism marketing, sports, PR, visitor service, etc.), for monthly or quarterly community discussion, planning, and the leveraging of collaborative resources.
- **New or expanded collaborative opportunities** for development of the annual marketing plan, the next strategic plan, team-sell opportunities and the hosting of major writers, tour operators and meeting planners who can drive new business to Buffalo Niagara.
- **Begin VBN's tracking and valuing** of monthly and annual in-kind program services provided by stakeholders, including room nights for meeting planners and writers, team sell participation, restaurant service support for clients, etc.

Next, the staff person responsible for the development of ongoing public affairs should continue development of the following programs and follow the same implementation outline for staff input, the approval of the President and the board.

Local media relations—objective: Produce and instill favorable impressions for tourism and its contributions to the health and wellbeing of Buffalo and its residents with ongoing positive and pro-active media relationships and messages by

- Cementing good will and mutual respect by meeting with editorial boards of publications at least annually, presenting positive information, backgrounders, industry trends, etc.
- Focusing on National Tourism Week as a major hook for information-sharing on the friends and relatives market, where local residents can invite their guests to enjoy the excitement of the new Buffalo Niagara.

Government relations—objective: Focus on tourism's viable ability to drive the economy

through the successful generation and sustaining of local jobs, and the substantial local tax revenue contributed by visitors that support the local economy and reduce the burden from residents, along with providing local social amenities and services, which visitors help support.

After Industry Relations completes its plan implementation, results should be evaluated by the annual tracking and reporting of stakeholder in-kind services and their manpower and financial resource value, along with the number of collaborative programs and participating stakeholders. It is also recommended that the stakeholder assessment survey be repeated in two years due to its current low scores.

2. Support the recommended industry relations program with key messages that effectively communicate the enhanced mission of VBN, its successful performance value, new objectives and the organization's strategic marketing process.

The Mission

The current Mission Statement of the DMO is:

“Visit Buffalo Niagara sells and markets our assets and attractions to visitors outside the Buffalo Niagara region as a convention, tourism and leisure destination for the economic benefit of the community.”

Other considerations include these observations:

The primary function of a DMO/destination marketing organization (DMO) is marketing: determining customer needs and then filling them through an integrated program of tactics and strategic initiatives. “Sales” is merely one of many delivery programs as are others not mentioned in the mission, including advertising, PR, Internet development, the website, collateral development, etc. Thus, sales should not be included either.

“Marketing outside the region” is a strategy and should be removed from the mission and later incorporated in a VBN marketing process that follows.

Mission statements for DMOs should not only state the foundational purpose of the organization, but also *who they are and what they provide to their communities*, such as:

- Visit Buffalo Niagara is the official destination marketing organization for the community
- Through a public/private partnership, it enhances the economic prosperity of Buffalo Niagara, its businesses and residents
- It is responsible for attracting additional or incremental visitation and resulting benefits for the community
- Once VBN receives its DMAI accreditation, this designation could be incorporated to demonstrate industry best practices

Thus, it is recommended that a new mission statement be developed by VBN that reflects the current state of the tourism industry and economy, and the emerging renaissance of the destination's tourism product and corporate culture by the end of FY2014.

The Value Statement

Measuring and reporting the collective, quantitative performance productivity returns from the VBN's ongoing marketing programs in a brief value statement is the quickest most effective method of communicating to stakeholders the organization's value in fulfilling its mission.

For example, the latest annual results from meetings, conventions, amateur athletics and group tour bookings yielded an estimated economic impact of approximately \$105 million dollars. Leisure visitor impacts generated from advertising, web marketing and social media marketing resulted in \$75 million dollars. Media publicity value of positive press coverage for Erie County tourism equated to nearly \$1 million dollars. Collectively these three sales and marketing initiatives totaled \$180 million dollars in annual visitor spending. These numbers, supported by extensive analyses, can then be totaled to provide the following annual value statement, including a return on marketing investment of 40-to-1.

In 2013, Visit Buffalo Niagara, operating with a staff of **26** people and a budget of nearly **\$ 4.4 million dollars**, produced **an estimated \$ 181 million dollars in new visitor expenditures, including \$ 105 million from the over 139,000 attendees at meetings, conventions amateur athletic events and group tours**. These activities generated nearly **\$ 17 million dollars** in tax revenues from **visitors and conference delegates** that visited the region.

Additionally, staff-generated out of town media publicity with an **approximate value of \$ 1 million dollars reached 174 million potential visitors** who are now considering Buffalo Niagara for future visits. Therefore on behalf of the County of Erie and its tourism stakeholders, Visit Buffalo Niagara delivered a **40-to-1 return on the investment** of marketing dollars made in Visit Buffalo Niagara.

This value statement provides an extremely productive and powerful response to the DMO's mission statement in clarifying its quantifiable dollar performance accountability and major business benefits for the city and its stakeholders.

Of great significance, this value statement delivers one of the DMO industry's strongest economic value statements for superlative performance. Yet it is only the tip of the iceberg in marketing value to the community, and doesn't address many other important aspects of its qualitative achievements including branding, center management, and business partnerships.

This value statement should be most often prominently communicated immediately following the mission statement and in response to it in all appropriate DMO publications including the annual marketing plan and ongoing stakeholder reports.

The Marketing Process

Also recommended is this new VBN Strategic Marketing Process, which communicates the necessary strategic requirements for successfully delivering the mission:

Visit Buffalo Niagara follows the best industry practice of producing quantifiable, goal based economic results:

- Through a market-driven, customer-focused, research-based and brand-oriented business approach.
- Concentrating on traditional visitor market segments (highlighted by leisure, meetings/conventions and sports) and geographic proximity to psychographic and demographic markets that yield optimal results.
- Primarily attracting overnight guests, which provide the greatest economic returns for Buffalo compared to the day trip or local market.

Core Objectives

These seven broad-based core marketing objectives cascade from the mission statement and are intended to fully clarify and support the parameters of all the ongoing work of Visit Buffalo Niagara.

1. **Generate positive awareness of Buffalo Niagara as a destination of choice for travelers.** (This objective deals with developing brand awareness as an initial step in the marketing process and may include programs such as public travel shows, billboards, and media publicity).
2. **Stimulate interest and desire on the part of consumers to take action and visit.** (This second marketing objective may include advertising, media publicity, web development, direct sales, collateral, etc.).
3. **Maximize the length and frequency of stay throughout the year to increase economic generation and enhance the value of the visitor's experience.** (Visitor center services, kiosks, sales training and product development applications are important strategies under this objective).
4. **Increase the business volume of tourism business partners and constituents.** (Stakeholder partnership programs are addressed under this objective).
5. **Proactively provide recommendations, support or deliver development of additional tourism products and services to enhance the visitor experience.** (Public advocacy, including infrastructure considerations are fulfilled with this objective).
6. **Maintain a research base for the community's tourism industry.** (Market and marketing research, such as economic impact studies, visitor profile studies, stakeholder assessments and other customer studies are potential components).
7. **Create positive awareness, support and participation for the DMO** (A comprehensive stakeholder and community relations plan, including partnership collaboration opportunities, are among programs included under this objective).

All future plans—including a strategic plan, an industry standard annual marketing plan, and individual staff performance objectives—should flow from the mission statement, the strategic marketing process and these broad-based DMO objectives. And all three should be consistently announced in planning documents including future marketing and business plans.

For future marketing plan development, each objective can be carried out by a series of strategies, followed by specific work programs or tactics that can be modified over time, based on changing market conditions, available budgets and other evolving needs.

Recommendation: the board should review and consider approval for all of the above. In addition, new communications messages should be developed as needed, along with questions and answers that may appear in stakeholder newsletters and other collateral.

Delivering long term performance success

3. Visit Buffalo Niagara's Board of Directors should officially endorse the planned initiative from County Executive Mark C. Poloncarz "to make Erie County the international tourism destination it should be."

To support the process (see the Executive's June 2013 report, *Initiatives for a Smart Economy*), VBN should commission a white paper that discusses the emerging opportunity for tourism as a major engine of social and economic development for Buffalo and Erie County.

This white paper should chronicle and validate the rapid rise of Buffalo Niagara tourism through more than an anticipated billion dollars in new performance productivity from the VBN during the next five years. It will also convincingly illustrate how the industry can dramatically further increase new tourism income for the community, along with new job creation and additional taxable resources through a traditional funding mechanism for tourism marketing that is now building market share for scores of other destination competitors at Buffalo's expense.

4. VBN should also support the County Executive's proposal to establish a VBN Funding Advisory Board. As the official tourism marketing organization for the destination, VBN should play an active role in the Funding Advisory Board.

The County has said in *Initiatives for a Smart Economy* that there is a need to explore mechanisms for increasing and stabilizing funding for VBN as county funding for VBN has been somewhat unstable and static for nearly a decade. The County Executive will appoint members to serve on the Board, which will be comprised of county staff, business leaders, hoteliers, representatives from local foundations, the labor community, and others. VBN should support the Board in any way necessary, including providing research on: 1) funding levels and models among peer cities; 2) hotel forecasting for the region; 3) the impact of static revenue during the last decade; and 4) tourism market trends and forecasts. VBN should also present all recommendations made by the Funding Advisory Board to the VBN Board for consideration and potential adoption.

5. VBN should continue to support and play a role in the County Executive's proposal to conduct a feasibility study for a new downtown convention center.

Prior to initial planning, the VBN should develop an in-house market analysis to determine the potentials for Buffalo Niagara's most lucrative market segments. Should the building be designed to accommodate traditional meetings and conferences as is currently recommended, or is there an even greater opportunity for a hybrid venue that can also accommodate the burgeoning amateur sports market for Buffalo as well as other intended uses?

A supportive analysis from the VBN should focus on annual lost meetings business to further clarify new future opportunities. For background, Visit Buffalo Niagara currently produces industry standard, in-house lost business meeting reports as a method for determining the reasons why a particular meeting or convention has not selected the community for their future business. By further modifying this report, the staff can quickly determine, on an ongoing basis:

- The primary reasons Buffalo may consistently lose business to other communities
- To whom do we lose it?
- Are there major competitors who consistently win out against us?
- What are the reasons for our competitor's success and for our resulting failure to achieve these bookings?

VBN can convert these reports into a powerful marketing tool by taking all individual lost business reports throughout the year and combining the findings in one comprehensive annual analysis. Staff can then quickly determine, on a percentage basis, the primary reasons for Buffalo's losses-- and then guide staff in planning a marketing response to address these competitive issues.

If hotel housing or center condition/size is a liability, the report may serve as a useful feasibility study resource in support of new building enhancements/inventory. If hotel pricing is a dilemma, this challenge can be reviewed with accommodations partners. If the same competitive cities consistently win out against Buffalo's ongoing efforts, staff should undertake a detailed competitive set analysis of these destinations by comparing the following in the latest DMAI organizational profile of DMOs:

- DMO budget and staffing, field offices, sales initiatives deployed
- Special marketing programs and considerations for convention development
- Infrastructure advantages (convention center, ballroom, location, other facilities)
- Financial package support

6. With the billion dollar 2016 Buffalo renaissance approaching, VBN should convene the *Buffalo Niagara Tourism Summit*, a special community forum featuring the national leaders of the most prestigious travel and tourism organizations to see first-hand the ongoing plans that will elevate Buffalo Niagara as a new destination of choice for future travel markets.

The 2016 billion dollar community renaissance should serve as a strong catalyst for jump-starting a new generation of collaborative optimism for Buffalo as the city's good news is shared with invited leaders of national and regional tourism industry intermediaries—travel writers, meeting planners and tour operators—to come and experience the New Buffalo, thus producing partnerships with Buffalo tourism businesses that could reap dramatic, productive business results for the community.

President and CEO Patrick Kaler should extend the invitations to these luminaries, including the chief executives of the Destination Marketing Association International, the International Association of Venue Managers, the US Travel Association, Brand USA, the Society of American Travel Writers, the US Tour Operators Association, the National Tour Association and the American Bus Association.

Following an afternoon site inspection tour of the community, they will meet with government and business leaders to share their insights and renewed optimism for Buffalo. Then the next morning, at a meeting attended by hundreds of local tourism industry stakeholders, the invited chief executives will share their personal and professional observations for the future of Buffalo in relationship to their own industry market segments and interests.

The new tourism white paper should also be unveiled by its principal developers during this important occasion.

This important event will convey a powerful and persuasive message to tourism leaders everywhere that Buffalo Niagara is now emerging as a major new player in the industry.

Managing Buffalo Niagara's Bright Tourism Future

7. Encourage government consideration of new community master planning that prominently incorporates and integrates the growth industry of tourism and its substantial benefits as is now being done by many successful communities.

A major consideration for Buffalo Niagara should be tourism destination product development through community master planning that focuses on producing financial performance, economic growth, increased market share for destinations as well as positive and lasting social benefits. A tourism master plan for Buffalo would also provide synergistic support and growth for the numerous capital projects slated for completion during the next three years. Such a process may include market research, industry benchmarking, and case studies of comparable destinations that could provide new ideas and opportunities for Buffalo's consideration. Dependent on need, the focus may include:

- Evaluating current conditions that may be hindering the growth of the visitor industry in Buffalo.
- Reviewing various need areas for the visitor industry including event facilities, attractions, festivals, and other demand generators. The focus can extend to shortcomings that may not be directly related to the visitor industry such as downtown housing, retail, streetscape and sidewalk conditions, and public transportation.
- Maintaining a focus on elements of the destination that are unique and authentic that can help create differentiation among competitive markets
- Making sure that the ultimate plan has full buy-in from public sector staff and elected officials, as well as key stakeholders in the visitor industry.

Issues addressed in such an analysis could also include:

- Identify lodging infrastructure, existing convention, conference and meeting facilities, and physical improvements that would enhance a visitor-friendly image—including issues such as signage, landscaping, security, aesthetics, green space, transportation linkages, and related features.
- Identify potential support for major destination attractions that could be developed to drive large increases in visitation.
- Evaluate municipal policies and procedures for their effectiveness in supporting the visitor industry—with recommendations designed to encourage visitor-related development.
- Evaluate the adequacy of destination marketing financial resources.
- Identify potential land acquisition needs and funding sources to ensure future visitor industry infrastructure development.
- Identify public sector initiatives that enhance the attractiveness of the destination.

- Clarify the economic impacts from major development opportunities, and include pro-formas as well.
- Evaluate local visitor industry organizations to ensure that the internal structures and cross-organizational linkages are conducive to growing the industry.
- Evaluate how current visitors to the area perceive the destination (through strategic plan findings and additional interviews conducted for this component of work), and identify changes that may be necessary to motivate and deliver additional visitors.
- Assess how regional travelers who have not been to the destination perceive it.

The result of these efforts, along with a comprehensive benchmarking analysis of competitive destinations, would identify strengths and weaknesses of the broad visitor industry, provide detailed strategies for improvement, and roles/responsibilities for particular entities in implementing recommendations.

Market Diversification through Attraction Development -- During master planning assessment, there may also be an exceptional opportunity for conceptualizing and creating a new visitor attraction that synergistically works with hotels and other community amenities to maximize new visitors, support Erie County and Buffalo's potential as a family destination, while serving as a major facility for the enrichment and enjoyment of local residents as well.

What could such an attraction offer, and what public and private manpower and financial resources must be provided to bring such an opportunity to fruition? The main priority would be to consider potential steps and benefits of a comprehensive community assessment for product differentiation and infrastructure analysis. Its purpose: To evaluate existing visitor industry infrastructure and amenities and evaluate specific opportunities for enhancements that could serve to improve Buffalo's destination appeal and drive new visitation.

Recommendation: To explore this tourism master planning concept and what it could achieve for Buffalo, an initial meeting is recommended with the DMO board and government leadership. A national expert in tourism master planning should be invited to review current processes, successful case histories and answer questions. VBN should engage and utilize the resources of the Regional Economic Development Council of Empire State Development.

VBN should pursue grant funding for this initiative.

Brand Development

8. Continue to develop, enrich and promote Buffalo Niagara's current tourism brand identity and brand promise for visitors by implementing a preferred industry destination branding process of consumer research, stakeholder input and culturization that enhances its competitive position through strong community support and participation.

Benefits provided

- Clearly defined points of differentiation to distance Buffalo from competitors in the minds of visitors.
- Creation of a "promise" that frames the destination experience from the visitors perspective as the basis for decision making and planning.
- Increased tourism revenues and profitability
- Improved image as new brand initiatives revitalize the destination
- Culturization of new opportunities for the development of stakeholder partnerships and alliances between private businesses and public organizations.
- Enhanced competitive positioning and market share.
- Increased visitor financial contribution
- More engaged hospitality constituency and government support at all levels.

Recommended major qualities of a successful destination brand initiative include

Front-Load total buy-in. From the outset, there must be enthusiastic participation from community leadership and hundreds of key community stakeholders who buy into the process, or the destination brand will fall short of its anticipated goals.

It is not about advertising, your brand is a strategic asset. To become a distinctive, one-of-a-kind destination brand that wins the hearts and minds of visitors requires an integrated strategic approach to brand development. Brands are more than names, symbols or slogans. A genuine brand is the "internalized sum of all impressions received by visitors and prospective visitors, resulting in a distinctive position in their "mind's eye" based on perceived emotional and functional behavior." Advertising and promotion are important, but only after a distinctive promise is developed.

Adhere to a set of Principles. Establish a set of brand values and principles to guide behavior and decision making.

Consistency. Staying true to the road map by following the designated course of action and messages is the path to attaining destination brand goals.

Stand Out to Stand Apart. The destination brand platform must be built on a set of attributes and factors, provided by research, that distinguish it from competitors in the minds and perspectives of visitors, influencers and stakeholders.

Brand evangelists are critical. To ensure total commitment and support at the most important levels of government, everyone throughout the community from the very top to the very bottom becomes an evangelist for the brand. No one person alone can champion the cause. It takes the team to ensure that all messages are aligned with the promise.

Live the Promise. A genuine destination brand is a pact with visitors. Successful brands keep their commitments with visitors and enthusiastically deliver on the promise throughout the entire community.

Step 1 – Brand Analysis and Research – Formal brand research of visitors/non-visitors and stakeholder interviews. Review of existing Brand position and execution of community wide Brand Summit.

Step 2 – Brand Benchmark – Review of research data to determinate key destination attributes and emotional connections among visitors and stakeholders.

Step 3 – Brand Promise - A clear definition and description of the destination’s emotional and functional benefits that will serve as the “Guiding Star” for all future brand development and marketing efforts.

Step 4 – Brand Enrichment – Creation of the specific steps necessary to bring the destination brand to life. This will include working with the ad agency on logo and tagline development as well as recommending possible service training programs or infrastructure development.

Step 5 – Brand Future – Suggestion of strategic partnerships that can leverage the destination brand among the community and grow its brand equity.

Step 6 – Brand Blueprint – Development of a formal working document that highlights all of the activities described above and will serve as the reference tool for all community presentations and for staff referral.

9. Continue to build Buffalo Niagara's Brand with media publicity through an expanded focus on the broad based leisure travel market, and a new emphasis on travel media familiarization tours that will significantly boost consumer awareness leading to visitation.

Today's industry research consistently concludes that destination brands are best built with PR/publicity and not with advertising (see the best seller *The Fall of Advertising & the Rise of PR* by Al and Laura Ries). This is because the messages that appear on editorial pages in stories—and not through purchased advertising—consistently garner higher marks with consumers for credibility. For these reasons, newspaper editorial travel sections, consumer travel magazines, and online, blogs and social media outlets have a powerful influence over the way travelers plan and choose their vacation travel. And this influence continues to grow, according to recent research studies.

The most important strategic initiative for generating major earned media coverage changing visitor attitudes is not through traditional press releases, but rather through on-site writer familiarization--allowing travel writers to share their personal experiences with readers that best motivate them to make future travel decisions to Buffalo.

The most effective method for destination familiarization is a process which plans and hosts journalists for each of their programs. The key to success is individually tailored itineraries designed to meet the individual needs of each travel journalist.

This requires a disciplined and effective planning process that includes unique and diverse tour experiences that intrigue writers and fulfill special needs of the destination and its tourism partners. Accomplishing this labor-intensive process also requires increased special assistance for each writer from the VBN staff as well as significant financial and in-kind services, but the results for this process can consistently be positive and extremely productive. Thus it will be critical that financial resources be dedicated to this initiative, while also continuing to build the already positive relationships with the destination's tourism industry to provide the best experiences to these travel and tourism influencers.

Meetings Development

10. Launch a newly created online website booking engine for meetings and convention business development through an internet based *Buffalo Niagara Convention Calendar* that links the convention center with thousands of new meeting planners, and guides them through the site selection process.

This state of the art initiative would highlight Buffalo's current onsite convention calendar and build on its electronic media leadership success in destination sales and marketing. The new program has just been announced through partnership with the International Association of Venue Managers and developed by Destination Advantage LLC, developer of the DMO industry's successful Hot Rates and Dates program. It will provide

- **Greater Awareness for Buffalo meetings** – through Destination Advantage LLC's proprietary database of more than 70,000 convention & meeting planner profiles. In addition, the program provides proven online destination marketing to reach event planners, exhibitors, local stakeholders, and delegates; highlighting the economic impact of the convention center, featured events, convention center availability and special booking incentives.
- **Lead Generation and booking** –Planners will now have access to a robust online calendar that shows current booked events but also includes special booking incentives and short term availability. Planners can submit RFP's directly to Convention Sales staff for appropriate follow-up.
- **Generate New Revenue** – Delivers a new funding source from advertising opportunities on the Buffalo Niagara Convention Calendar.
- **Attendance boosting at featured events.** Boosting Center attendance and selling more tickets at events on the Convention Calendar. Exhibitors and delegates can easily share events through social media channels.
- **Tracking & Reporting** – Buffalo will have real time access to measure destination awareness, lead generation, and attendance boosting efforts.

Professionalism

11. Establish New Global DMO Accreditation for Visit Buffalo Niagara that will serve as a visible industry distinction of quality and performance standards in destination marketing and management.

The president & CEO plans to register VBN for the Destination Marketing Accreditation Program (known as DMAP) from the Destination Marketing Association International. Since January, 2007, 180 DMOs have earned their accreditation, which involves compliance with fifty-eight mandatory and thirty voluntary standards in areas including governance, finance, human resources, sales, marketing, communications, destination development and research.

Currently, one senior staff executive is pursuing industry Certification as a Destination Marketing Executive (CDME) from DMAI; one senior staff member has obtained the Certified Meeting Professionals (CMP) designation from the Convention Industry Council and five staff members are pursuing the CMP designation. One staff member of the Buffalo Niagara Sports Commission has received the Certified Sports Event Executive designation from the National Association of Sports Commissions.

President and CEO Patrick Kaler holds a Master's Degree in Tourism Administration and has a significant career track record of management and marketing expertise through his work for nationally recognized destination marketing organizations.

Also, on an ongoing basis, the staff should continue to enhance their expertise by ramping up participation in local educational seminars and workshops, along with regional and national educational forums (particularly DMAI and US Travel). VBN leadership should continue to dedicate resources for ongoing education and training for staff enrichment.

Marketing Research

12. Produce a comprehensive Buffalo Niagara Visitor Market Study to provide much needed information for reaching and motivating the primary discretionary travel leisure market. The study would also prove invaluable to local community tourism stakeholders for their own marketing efforts.

The methodology and process: An analysis of both the visitor and the non-visitor markets are recommended, focusing on the overnight market—within a 300-to 400-mile radius that potentially contributes about eighty percent of destination leisure visitors. About 600 survey respondents can produce a study that is projectable to Buffalo's universe of potential visitors.

The sample for the Internet survey can be procured by analysts through a national survey panel with millions of consumers that match US census data within 1 percent and are representative of the larger North American population. As a result, the research firm should be able to select survey participants according to more than 120 lifestyle characteristics, including travel interests and behaviors. The Canadian market should also be represented. Respondents to the survey should be recruited according to the following criteria:

- males and females living within required geographic areas
- people having taken a leisure trip and stayed in a hotel within the past twelve months
- people involved in planning vacations or leisure trips for the household
- people with \$50,000+ annual household income.

The online survey instrument should be designed to assess various aspects of the leisure travel market. It can also further define potential visitors, evaluate current marketing activities, clarify area attribute/amenity appeals, and enhance messaging, the survey should address these key areas:

- **Developing a detailed picture of the current and potential visitor market** in terms of demographics, attitudes, travel needs, and behaviors
- **Understanding what non-visitors are looking for** in vacation destinations and how to best attract them to visit your destination in the future
- **Evaluating the importance of attributes** and amenities that drive visitation
- **Measuring awareness, familiarity, visitation, and consideration** of the area relative to nearby destinations
- **Measuring perceptions of your visitor attributes** in the context of competitive destinations and key drivers of visitation
- **Identifying new facilities and services** that would attract more visitors

- **Understanding how current communications are working** and uncovering potential ways to improve your future messaging
- **Measuring visit satisfaction**, likes/dislikes/wish lists and their likelihood to recommend.

13. Develop a competitive set analysis to determine how well the VBN is performing in relationship to its competition from other destinations.

How well is Visit Buffalo Niagara doing in delivering performance activity and productivity in comparison to other DMOs? Until now, much competitive information has been proprietary and unavailable, but a new program from the Destination Marketing Association International provides an instant, credible, and confidential way for VBN to compare and analyze its data regarding 100 key metrics with other participating DMOs including:

- meeting sales and booking pace
- Stakeholder engagement
- leisure marketing metrics including digital and social
- website results and much more.

14. Evaluate and enhance Buffalo Niagara's meeting/convention/sports service to build customer retention.

Convention and Sports service evaluations are now requested by the services staff, but are only being completed by about two of every ten clients. This adversely impacts the staff's ability to determine projectable levels of customer satisfaction and its ability to enhance service programs. This can occasionally be a universal industry problem, as busy clients prepare to leave for their next assignment with little thought about the evaluation needs of the DMO.

Recommendation: To assure receipt of these completed surveys, establish their completion as a first priority, and so note it as a personal performance objective of the staff person responsible for survey completion—incentivizing them for accomplishing the task of completing eight of ten surveys. Then develop a process for securing these surveys through phone and email responses that include ongoing follow-up with clients until completed.

Market Research

15. Determine Buffalo/Erie County's tourism market share in relationship to state growth, as well as to other New York competing destinations.

An annual study from New York tourism quantifies the economic impact values of tourism on a state basis, as well as for each individual county, including visitor receipts, resulting tax revenue, the numbers of businesses serving travelers, employees in the industry and jobs generated by visitor spending. Produced by Tourism Economics, this is a valuable asset for quantifying the tremendous positive impacts from tourism spending in Erie County.

To aid in determining the growth and value of the area's tourism economy, it is recommended that VBN request a brief comparative analysis by Tourism Economics that shows the growth of state tourism during the past five to ten years, determining the relative market share of Erie County visitor expenditures for the period.

If Erie County's market share has increased over the time frame in relationship to other competitors and/or the state, it illustrates the strong viability of the Buffalo region as a major market for future visitors and travel marketing attention. If, on the other hand, there is a reduction in Erie County's market share, a competitive set analysis should be considered including other state destinations who outspend Buffalo for destination marketing.

Fulfilling Customer Needs

16. Engage VBN customers via organized councils and/or surveys to facilitate capturing essential information and data for understanding critical customer perceptions and needs.

Three priority customers should be analyzed:

The Meetings/Conventions: Through the newly created VBN Customer Advisor Council, current, previous and potentially new executive level management and meeting planners will convene annually in Buffalo to advise on:

- overall perceptions of Buffalo Niagara region
- quality of the convention center facility
- quality of hotel and off-site facilities
- management of convention/meeting requirements
- quality of hotel accommodations
- quality of food and beverage
- quality of transportation and logistics
- quality of planning and administration for both the convention sales and convention services departments
- quality of customer service from the convention sales and convention services departments
- quality of sales marketing tools, including but not limited to printed collateral, website/online, advertising, site visit protocol

Meeting planners should be asked their overall opinion on areas that VBN excels as well as what areas are weak and need improvement. The council will be asked to make suggestions to improve convention processes or quality of customer service.

The Tour Operator Survey: Tour operator surveys would be directed to those who bring group tours to or near Buffalo Niagara. The focus is on perceptions of the destination as an attraction and the quality of service provided by the tourism staff. Tour operators would be asked to indicate multiple characteristics of their business in relationship to the destination. They would be asked to rate the following categories:

- quality of accommodations
- quality of attractions
- quality of restaurants
- experience at destination
- quality of DMOs promotional activities and services.

The tour operators should also be asked what the DMO did really well; to comment on anything they were unhappy about, and for suggestions to improve the quality of customer service. The focus of the survey is on very specific aspects of customer service, with the opportunity for narrative comments and responses to open-ended questions. This is very effective for zeroing in on specific areas for improvement. Typical categories are as follows:

- quality of product, service, or program
- quality of customer service from staff
- professionalism and competence
- other operational aspects for review and feedback.

17. With the support of government leaders, improve efficiencies of the current municipal oversight contract through an agreement that encourages long range partnership success.

Throughout the destination marketing industry, the majority of DMOs having contracts with government agencies are for multi-year durations, with the average term being six years.

VBN currently has a one year contract with the County that is supported by ongoing market and business plans as well as attendant quantitative and qualitative performance goals to be achieved--one of the most comprehensive and well documented contract commitments in the industry.

However, most experts agree that one-year government contracts with DMOs can minimize contractor confidence and can impede performance. They are also a serious impediment to long range planning, the contracting of marketing work required by other major suppliers such as advertising, trade shows, and a host of other tactical work, and can adversely affect employee morale and ultimately, job retention.

Recommendation: For these reasons, a revised three to five year agreement should be pursued (considered/investigated).

Vision

18. The Board should endorse a long range vision for Visit Buffalo Niagara that aspires to the principles of destination marketing and management excellence and clarifies how it should be recognized by the community and its stakeholders.

The new vision should answer these questions: How can Visit Buffalo Niagara best fulfill its mission for the positive future of the community, and what values must be embraced to fulfill that goal?

During this strategic planning process, members of the board of directors worked to create a vision for the future DMO, and how it should be recognized. They began by imagining that it was actually five years hence, and the optimal destination marketing organization had now been created for the community.

How do we best describe this new organization and its attributes? And what values did we foster and embrace in order to create it during the ensuing period? In other words, what do we value for the current organization and what can we pragmatically see improved? Board members then listed their perceived attributes of the future Visit Buffalo Niagara:

- Has a forward looking board that fulfills a productive strategic vision
- A well trained, dedicated and skilled staff
- The DMO provides a marketing program effort that consistently produces new, incremental business results for its community and stakeholders
- It operates with candor, transparency and best business principles in a full partnership with government and community business interests
- Its programs of performance and operational excellence meet and exceed the professional standards of today's optimum DMO
- It is the community's respected leader for tourism development
- The DMO enjoys strong partnership support and marketing participation of community stakeholders and organizations
- It operates with a competitively funded program providing required manpower and marketing resources to achieve success

These required attributes were then combined and incorporated to describe this new vision of the Visit Buffalo Niagara of tomorrow.

Revised Visit Buffalo Niagara Vision Statement

Visit Buffalo Niagara is an organization that adheres to the highest professional and industry standards to project a consistent, positive image for Erie County that emphasizes its unique qualities. VBN creates and maintains public and private partnerships to fulfill its mission, and promotes community awareness of the importance of the visitor industry to the local, state and regional economies.

Recommendation: The board should adopt this new vision and memorialize it in all appropriate public affairs communications messages. As part of annual market planning, the vision statement should be annually reviewed by board and staff to determine potential modifications going forward.

Additional Long Range Opportunities

Following review, approval and scheduling of the top seventeen opportunities, here are other potentials for future consideration.

Keep the region apprised about what's happening in Buffalo, who's coming, and how tourism works for them, which is also supportive of the visiting friends and relatives market.

Focus on authentic experiences, and sharing the New Vibe Story – pitching these stories to interested travel media. The Public Arts Initiative from Albright-Knox will also contribute to the vibe.

Stronger coalition building with VBN and other organizations in an effort to deepen knowledge and education for public sector buy-in for tourism and the DMO

VBN should take more credit for its significant success on behalf of the community, and change the perception that tourism isn't important to government, industry and the resident population.

Develop local industry roundtable discussions, the most effective method for sharing and the development of collaborative programs, rather than just the reporting out of work achieved by the VBN.

Rely on strong and positive testimonials from writers, planners and tour leaders to tell the Buffalo Niagara story.

The new leadership for the VBN has a fresh vision, voice and visibility that should be emulated and encouraged throughout the community.

Transportation and travel: Public transportation alternatives should be explored—we are too car dependent.

Wayfinding signage is an important need in moving people easily throughout the community. Such a program also identifies our great visitor resources that build our brand and enhance the value of the visitor experience while encouraging repeat visitation.

Concentrate on markets and opportunities that will continue to produce the greatest returns.

Educating our constituents builds program understanding and collaboration, and that's a necessity in this competitive environment. Also, find new ways to increase relevance with industry partners.

Explore new partnership opportunities including integration of all touristic assets, attributes and segments for a broader world view.

Leverage opportunities through national tourism week and with state tourism, Niagara County and greater Toronto. Also, find additional alignment with the Buffalo Billion dollar renaissance plan such as master planning.

Cross promotions, such as using local celebrities, dignitaries (i.e.: Buffalo Bills/Sabres players/coaches, Goo Goo Dolls, Dr. Khurshid Guru, Brian McKnight, Christine Baranski, etc.) to promote museums and the arts.

Plan an expanded program of travel intermediary familiarization programs that are extremely effective in generating new business, including those for travel writers, meetings planners, tour operators, as well as front line local service personnel.

Develop pre and post meeting programs to extend the stay of those coming for events/conferences.

Work to provide International Designation of the Niagara River (ecological integrity of the river).

Foster local tourism industry support and participation (brand culturization) in using Buffalo's destination brand messages.

Incorporate other opportunities for consideration, including a Wine trail and Agri-tourism.

Leverage resources of the colleges and universities to promote the Buffalo Niagara experience.

Use technology and incorporate weather for real time updates to visitors.

Open the lines of communication, making information available as to why Buffalo was not chosen to host particular events, and other competitive information that makes us more proficient in our marketing.

Create more community cheerleaders for Buffalo Niagara tourism.

Seek out board and committee representation by experienced industry leaders and destination marketing professionals.

The Strategic Planning Consultant Team

Marshall Murdaugh, President, Marshall Murdaugh Marketing, was retained by Visit Buffalo Niagara to provide strategic support in development of this plan.

An internationally recognized consultant to successful destination marketing organizations and the communities they serve, Marshall Murdaugh served as President and CEO for some of America's most successful and best recognized programs, including New York City (88-94), Atlantic City (94-00), Memphis (83-88) and the State of Virginia (70-83) where he developed the successful and award-winning "Virginia is for Lovers" marketing campaign. For the past fourteen years, his consulting firm, headquartered in Richmond, Virginia, has provided award-winning strategic planning services to more than ninety county, city, state and regional destination programs and organizations.

Murdaugh was a member of the Performance Team that developed the convention/tourism industry's Marketing Performance Standards and return-on-investment criteria for the Destination Marketing Association International (DMAI). He is the recipient of the Lifetime Career Achievement Award from the Association of Travel Marketing Executives and is a former member of the board of the Destination Marketing Association International and the U.S. Travel Association.

His new book, *Destination Marketing Insights: How to Boost Performance, Increase Customers and Maximize Market Share* is acknowledged as a major industry resource for destination marketing and management. For more information, visit WWW.MMTourismMarketing.com

Wil Brewer, President of Performance-Solutions-Group, Inc. (PSG), developed and conducted the Stakeholder Perception Survey for this plan. Based in Stamford, Ct., PSG is a management consulting company, whose domestic and international focus is

- Performance management systems
- Facilitation of the strategic planning process
- Pay-for-performance compensation plans, compensations structures and marketing pricing surveys
- Management diagnostics (360 degree reviews. Employee engagement surveys, customer/ stakeholder surveys)
- Management and leadership training
- Executive coaching
- Behavioral assessments

PSG works with Fortune 500 companies as well as small and medium-sized and leading not-for-profit organizations. Additionally, Wil Brewer, has provided many of the above consulting services to numerous DMOs throughout the industry, including most of the largest.

Ralph Thompson, President and Chief Brain of eBrains, Inc. assisted in the facilitation of this plan's focus group sessions of community stakeholders, including the board of the VBN and senior staff.

His 40 year+ business background includes formal training and grounding in finance and accounting with Price Waterhouse Coopers and as the Chief Operating Officer of the Martin Agency, one of the nation's leading creative advertising firms.

Thompson has worked with global, national, regional and local brands to develop and implement digital solutions on a guaranteed basis. While his knowledge spans most industry categories, he has focused primarily on destination marketing brands for the past 15 years at country, state, regional and DMO levels for over 150 destinations.

In addition to Visit Buffalo Niagara, clients range from the US, Canada and Peru; to Florida, Virginia, Texas, Nebraska; to Great Lakes, Southeast Tourism Society and CARUSA to New Orleans, Orlando, Hilton Head Island and less well known Marietta, Ohio; Victoria, Texas and Parkersburg, WVA.

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