




TourismSaskatoon

2015-2019 STRATEGIC PLAN



OUR INDUSTRY *Today*

Tourism is the world’s largest industry, with international travel receipts totalling \$1.159 trillion in 2013. It is attracting significant investment from new and emerging economies whose sole focus is to increase export revenues through tourism. While Canada remains a strong global destination brand, this new competition has led to a decline in our position. Canada now ranks 16th in International Tourist Arrivals where once we were a leader.

Mid-sized Destination Management Organizations (DMOs) such as Tourism Saskatoon have a pivotal role to play in reversing this trend. Tourism generates increased trade and export activity – a key focus of the federal government’s Global Commerce Strategy. Tourism Saskatoon needs to align its programs to take advantage of this strategy. At the same time, Tourism Saskatoon can never lose sight of the critical importance of our domestic market—65% of our tourism revenues come from visitors within the province.

This Strategic Plan will guide our efforts to prove our relevance in the global marketplace, while continuing to serve our domestic market.

SEEKING 20/20 VISION

Vision Saskatoon is a top of mind tourism destination in Canada.

Mission We are Greater Saskatoon’s destination management organization, expanding our economy through conventions, sports, and leisure tourism.

Strategic Priorities

- Maximize return on investment to our Destination Marketing Program partners, government funding agencies and other major partners/shareholders.
- Increase recognition of the Tourism Saskatoon brand locally, and Saskatoon as an excellent host city nationally and internationally.
- Define and expand Tourism Saskatoon’s role in product and policy development.
- Increase the awareness and engagement of members, shareholders and the community at large.
- Implement and market environmental stewardship by our members.



We believe Tourism Saskatoon should remain proactive in product development.

PLANNING ENVIRONMENT

Last year, Saskatoon hosted eleven times its population in visitors, an exemplary performance. We intend to keep it that way!

Saskatoon's local industry has continued to evolve to serve visitors from both within and outside of Saskatchewan. Recent industry investments are adding to our competitive advantage.

The second major expansion in the last eight years of the Saskatoon International Airport is now approaching completion. Prairieland Park has added significant new trade and convention space. At least eight new hotel properties are under construction or recently completed, and all existing hotels have invested in upgrading their facilities and amenities. The launch of the Remai Modern Art Gallery of Saskatchewan, along with its unequalled Picasso collection, will draw international media attention ... and art aficionados will follow.

Unfortunately, we lag in the development of new sport facilities, even though Canada ranks very high internationally for hosting sport events. Saskatoon must also seriously consider expanding TCU Place to compete with an explosion of new convention centres across Canada.

On the marketing side, we continue to benefit from the Destination Marketing Program (DMP), with close to \$3.3 million in annual activities supported through the hotels. Over the 2015-2019 planning horizon, we expect to see mobile technologies overtake all other booking platforms. Social media has become king, while Big Data, appropriately used, will customize content to each individual traveller. The old "path to purchase" has become convoluted. Today, it operates like a network with many different entry points and outcomes. Destinations that do not adapt will be quickly left far behind.

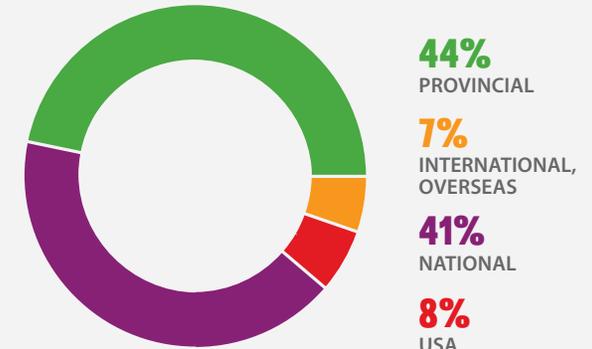
Visitation & Spending Patterns

Many factors affect the convention, sport, and leisure tourism industry in the greater Saskatoon area. Tourism Saskatoon's strategic planning occurs within an evolving environment of local, regional, national and international trends.

 We believe in being accountable to our shareholders.

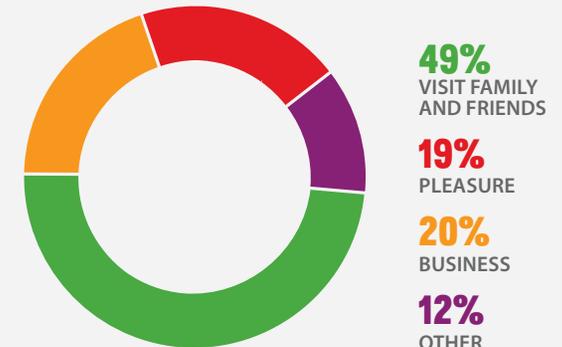
What Spending Is Associated With Overnight Visitors?

Out-of-Province guests accounted for 56% of all spending by overnight visitors to Saskatoon.



Why Do People Stay Overnight in Saskatoon?

Nearly half (49%) of all visitors to Saskatoon stay overnight so they can visit with family and friends.

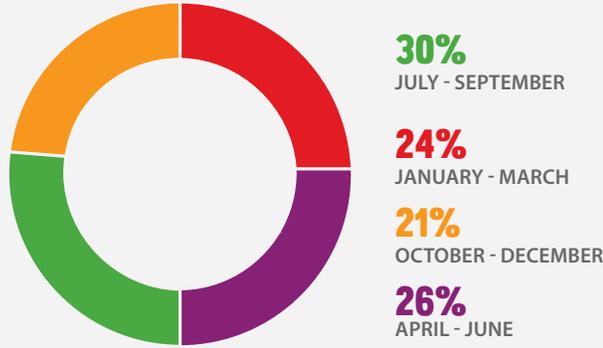


IN 2012, 2.8 MILLION PEOPLE VISITED SASKATOON ON SAME DAY AND OVERNIGHT TRIPS¹

¹ Source: Tourism Saskatoon: A Summary of Tourism in 2012, published May 2014. Data estimates in the report are derived from Statistics Canada's 2011 International Travel Survey (ITS) and the Travel Survey of Residents of Canada (TSRC).

When Are They Visiting?

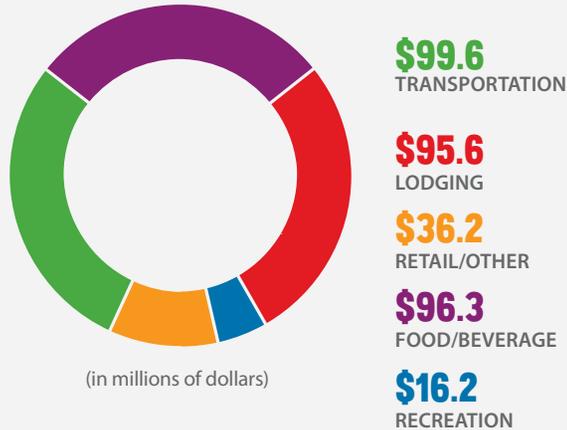
Saskatoon is a four season destination, with only slightly more people visiting in the summer than in the fall, winter or spring.



What Are Overnight Visitors Spending Their Money On?

In 2012, visitors injected over \$505.3 million—half a billion dollars—into our economy.

Overnight visitors account for two-thirds of all tourism spending.



16,500 PEOPLE ARE EMPLOYED IN TOURISM RELATED JOBS IN SASKATOON, WHICH REPRESENTS 9% OF THE CITY'S WORKFORCE

TRENDS IMPACTING OVERNIGHT VISITS

TOURISM AREA	TREND
Meetings, Conferences & Conventions	<ul style="list-style-type: none"> Demand for meetings is strong and growing Incentives are part of the landscape Lead times are shorter Meeting lengths are shorter Meeting technology is more than connectivity - it's an expectation Meeting planners are seeking non-traditional spaces The meeting destination is as important as the meeting venue
Leisure Travel	<ul style="list-style-type: none"> The nature of families is changing The population is aging in most markets Internet and mobile technology puts consumers in control Festivals and events are key travel motivators Demand for sophisticated travel experiences is increasing Interest in experiential travel products is growing The rate at which social media is influencing travel is accelerating
Sports Tourism	<ul style="list-style-type: none"> Sports tourism is increasingly competitive Events and sports bodies may have existing hotel relationships Third party sport tourism planners are part of the landscape Owned events are embracing the "festival" approach Financial support for sport tourism events is multifaceted Sports tourism is a growth sector Sports tourism is resistant to economic downturns

Source: Tourism Saskatoon Marketing Strategy to Drive Overnight Visits: 2012 Update, The Tourism Company

KEY STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

Key Strength: DMP and Event Funding

The Destination Marketing Program (DMP) is working well and Saskatoon events benefit from generous corporate sponsors. The majority of major event funding comes from the City of Saskatoon and Province of Saskatchewan.

Key Weakness: Core Funding

The fact that provincial and municipal governments provide funding for events is one side of the coin; the flip side is that the province has eliminated core funding to Tourism Saskatoon. So while funding is available to support events, less core funding limits our capacity in terms of programs and operations.

Key Opportunity: Involve the Business Community

Saskatoon's collective understanding of tourism must grow beyond nights spent in a hotel or visiting attractions to include retail, dining and experiential learning opportunities. We must promote blended travel as an opportunity to encourage visitors to stay a few extra days, either before or after a convention, sport event or family visit, and explore Saskatoon's many sights and services.

Since many things impact Saskatoon as a destination (e.g., sports facilities, direct air flights, infrastructure), developing tourism must be a collective effort involving Tourism Saskatoon, major partners, shareholders, members, and others in the business community. We believe both large and small businesses can play an active and influential role in marketing our city as a destination.

We also see an opportunity to make more use of our quantitative data (e.g., expenditures per visitor) to promote the benefits of tourism to the business community. Since labour recruitment is an issue for some, we see an opportunity to partner with businesses to help sell the city to prospective employees.



We believe in seeking partnerships and participating in consortiums where it is mutually beneficial and meets the needs of our shareholders.



Key Threat: Lack of Iconic Facility/Experience

Saskatoon does not yet have an iconic facility or experience, nor is there adequate funding for upgrades to aging convention and sport facilities. There is a trend among policy makers to underestimate the full economic impact of tourism, resulting in a clear threat to a healthy tourism industry.

Underestimating the economic impact of tourism and narrowly defining tourism as leisure travel (rather than leisure + conventions + sport events) not only influences funding for facility upgrades, it impacts community engagement in Tourism Saskatoon partnerships, initiatives, learning opportunities and brand buy-in.

Key Weakness, Key Opportunity: Promote Tourism Saskatoon Brand

Tourism Saskatoon focuses efforts on external markets. This limits promotion of our brand in the local market, which in turn limits brand awareness. "Saskatoon Shines" is the city's overall brand, and something we actively support. But Tourism Saskatoon has our own brand – *Local Treasures, Openly Shared*. It includes six brand attributes, each of which reveals the character of Saskatoon and its tourism offerings. We see increasing implementation of our brand at the local level as a major opportunity in the 2015-2019 planning cycle.

REDEFINING OUR STRATEGIC PRIORITIES

Maximize return on investment to our DMP partners, government funding agencies and other major partners/shareholders.

Tourism Saskatoon will continue to focus on providing the best return on investment to our major shareholders and funders. This priority recognizes that the marketing funds contributed by hotels as part of the Destination Marketing Program (DMP) have a specific purpose, namely, to drive more overnight visits to the city. This benefits the city as a whole, not simply hoteliers.

Key results: Tracking existing metrics to chart increase in overnight stays, visitor expenditures and length of stays.

Increase recognition of the Tourism Saskatoon brand locally and Saskatoon as an excellent host city nationally and internationally.

Local Treasures, Openly Shared is Tourism Saskatoon's brand, and we've built a series of specific campaigns/themes based around that brand. A priority in the 2015-2019 planning horizon is to increase recognition of the brand, while also increasing local adoption and buy-in. Our progress here will be a reflection of our success in another priority—increasing the awareness and engagement of members, shareholders and the community at large. Potential strategies include making the brand visible on Tourism Saskatoon's website and integrating it into our social media and mobile products.

Key result: More members and shareholders using *Local Treasures, Openly Shared* branding and our active campaigns/themes in their marketing efforts.



We believe the members of Tourism Saskatoon are our owners: our goal is to establish value-added relationships that realize economic benefit for all.



Define and expand Tourism Saskatoon's role in product and policy development.

Although Tourism Saskatoon has not created a destination development plan for Saskatoon, it is increasingly clear that we have a role to play in this area, particularly in product development. The first step will be to clearly define what is required in product development and how we can be further involved.

Our focus will be on developing Saskatoon's capacity to attract and host conventions, sport, leisure, and other events. An increase in direct air flights, expanded capacity at the SaskTel Centre and TCU Place, and new/updated sports facilities are critical to success.

We will continue to work with government, shareholders and other organizations to build partnerships and advocacy networks. Success in this strategic priority will move us forward in our efforts to expand perception of "tourism" to include conventions, sports, cultural events and leisure tourism.

Key results: Greater recognition of Tourism Saskatoon as a trusted intermediary and advocacy partner in promoting investment in facility upgrades and service improvements. Greater recognition of leisure tourism, sports and conventions as economic drivers. Shareholders at all levels connecting with Tourism Saskatoon and involving us in their advocacy/planning efforts.



Increase awareness and engagement of members, shareholders and the community at large.

There is an important link between awareness and engagement. By increasing awareness of Tourism Saskatoon and what we do to bring convention/sport/leisure tourism events to the city, we open the door to increasing engagement. Members who are more aware are more engaged. Greater engagement can lead to more participation in marketing opportunities, more buy-in on branding campaigns and more member involvement and/or support of our efforts to bring major events to Saskatoon.

Members and shareholders are different audiences than the community at large, giving this strategic priority a double-edge.

- ▶ Shareholders, such as hoteliers, are generally more aware and engaged in our activities due to their participation in the DMP.
- ▶ Members and the community at large tend to be less aware and engaged, making them a focus of this strategic priority. Staying at the forefront of social media and new technologies are key tools for cost-effectively increasing awareness and engagement.

Key results: More members and shareholders using the *Local Treasures, Openly Shared* brand and our active campaigns/themes in their marketing efforts. Continued development of a community of ambassadors—a 2009 strategic priority—is also key. Marshalling the right ambassadors with the right message can be a powerful tool in increasing awareness and engagement.



Implement and market environmental stewardship by our members.

Travellers are increasingly seeking destinations with environmentally friendly practices. We foresaw this trend in 2009 when we made it a strategic priority to develop and expand environmental stewardship by the industry. This resulted in our Green Stem program, an on-line resource for our members. Green Stem helps guide members in making deliberate choices to minimize their environmental impacts.

Our focus now is to encourage more members/shareholders to take the Green Stem pledge and practice environmental sustainability in their operations. We are encouraging members to not only meet, but exceed visitors' expectations in this area.

Developing the environmental stewardship program was also a requirement for accreditation by the Destination Marketing Association International (DMAI). Tourism Saskatoon remains just one of nine DMOs in Canada to be internationally accredited—a strategic advantage in and of itself. We believe that marketing this achievement to a wider audience will increase awareness and engagement of our members, shareholders and the community at large.

Key results: Clear metrics to show the number and/or diversity of members taking the Green Stem pledge and practicing environmental sustainability in their operations. Also, more metrics to give members/shareholders clear reasons to invest their time and resources into becoming more environmentally sustainable.



We believe in modelling and expanding environmental stewardship by industry.

2015-2019 STRATEGIC PLAN

Aligning Our Strategic Direction

The focus on the following pages incorporates input from Tourism Saskatoon shareholders, board members and employees.

VISITOR SERVICES

We will enhance Saskatoon's reputation as a top destination for conventions, sports and leisure tourism by providing a range of visitor services. These services will focus on promoting longer stays, repeat stays and increased expenditures during stays.

We will provide access to information through a variety of media, both physical and virtual. We will use our biannual visitor survey and knowledge of market trends to evolve our media mix. By proactively managing our online and social media presence, we will ensure visitor information and services align with changing market needs. We will maintain our award-winning mobile visitor information services, taking our front-line travel councillors to events around the community.

ACTIONS

1. Provide visitor services through multiple media channels (e.g., kiosks, print, mobile, web).
2. Adapt our mix of information channels to meet evolving visitor needs.
3. Provide sales training and education for visitor services staff.
4. Conduct regular Visitor Experience Surveys.
5. Distribute information at targeted festivals and events.



COMMUNICATIONS & MEDIA

Our vision of Saskatoon as a top destination and our mission of expanding Greater Saskatoon's economy through conventions, sports and leisure tourism drives our Communications and Media activities.

Our key strategic focus is that Saskatoon be widely recognized as an excellent host city. This is one of several Tourism Saskatoon brand attributes, but it is one that Saskatoon citizens recognize and embrace. This makes it a compelling theme for our external communications as well as a rallying point for building local awareness of Saskatoon as a top destination.

With a limited communications budget, we will focus on using our strong network of local relationships to communicate the significant economic impact and widespread social benefits of our industry. Our audience includes shareholders, policy makers, members, media and the general public.

ACTIONS

1. Champion the Tourism Saskatoon brand and ensure brand alignment in both our internal and external communications.
2. Increase travel media stories about Saskatoon and region through building relationships with travel writers/publications
3. Enhance our web-based and social media platforms.
4. Enhance communications to local shareholders, policy makers, members and media to increase awareness of the economic and social benefits of conventions/sports/leisure tourism.
5. Generate increased community awareness of our products and services in order to enhance ambassadorship of Saskatoon.



We believe in playing a leadership role in communicating the economic benefit of destination marketing to decision-makers and the community.



INDUSTRY DEVELOPMENT

Defining and expanding Tourism Saskatoon's role in product and policy development is the strategic focus of Industry Development. This is a diverse program area, involving everything from facilitating food trucks on Saskatoon streets and bike rentals in riverbank parks, to advocating for upgrades to sport, convention and leisure facilities.

We will lobby to help remove barriers to industry growth. We will leverage our national reputation as a leading destination management organization to be the point of contact for industry development in Saskatoon and area.

A main focus is to broaden the local view of tourism to embrace all three elements—conventions, sports events and leisure tourism. This also connects to our Communications and Media strategy of increasing local awareness of the economic and social benefits of convention/sport/leisure tourism.

ACTIONS

1. Define the parameters of our role in product and policy development.
2. Clearly communicate our role in product and policy development to policy makers and convention/sport/leisure tourism event organizers.
3. Develop lobby and advocacy campaigns to proactively support industry expansion and react to current issues.
4. Enhance our local profile as a nationally recognized leader in industry development.



CORPORATE SERVICES

Our members continue to be the focus of Corporate Services activities. All five strategic priorities are reflected in these activities, but the key focus is helping members understand the role of Tourism Saskatoon as a trusted intermediary.

We will continue to ensure our members find value in Tourism Saskatoon's marketing programs. We will also emphasize (1) the value of belonging to a nationally respected industry association and (2) the importance of continuing to promote Saskatoon's convention/sport/leisure tourism industry. This directly supports our Communications and Media strategy of increasing the awareness of the economic and social benefits of convention/sport/leisure tourism to partners, members, policy makers, media and general public.

Tourism Saskatoon will continue to be a valued source of quality research on the tourism industry. We will also continue to respond to our members' evolving needs by providing opportunities for networking and learning.

ACTIONS

1. Provide members with events and services that generate knowledge and provide networking opportunities.
2. Grow member participation in these events.
3. Build awareness, promote involvement and increase member use of the resources offered by Conventions Saskatoon, Saskatoon Sports Tourism, Green Stem and our Lesbian, Gay, Bisexual and Trans-sexual programs.



We believe in embracing diversity and social responsibility.



LEISURE MARKETING & TRAVEL TRADE

We will further enhance Saskatoon's reputation as a top destination by using our brand strategy, as well as our collective knowledge and research, to guide annual activities in Leisure Marketing and Travel Trade.

We will continue to leverage marketing opportunities through the Canadian Tourism Commission and Tourism Saskatchewan. We will also maintain our accreditation in the global Destination Marketing Association International (DMAI) program, one of only a handful of Canadian DMOs to have earned this status.

ACTIONS

1. Build Saskatoon's leisure appeal in primary markets, while investigating and capturing emerging markets.
2. Provide support for travel trade interest in Saskatoon and region.
3. Expand marketing partnerships with our major members, the Canadian Tourism Commission and the Saskatchewan Outfitters Association.
4. Position Saskatoon as a desirable destination for overnight stays for motor coaches and tour groups travelling through the province.
5. Enhance Saskatoon's reputation as a tourism destination by focusing on the local treasures and distinctive attractiveness of our city, as outlined in our brand strategy.
6. Continue to evolve our mix of traditional, digital, online, and mobile advertising mediums.



NATIONAL CONVENTIONS & CULTURAL EVENTS

Our strategic focus in National Conventions and Cultural Events is to build on our vision of Saskatoon as a top destination—and to enhance engagement of shareholders, members, and the general public in this vision.

We will promote Saskatoon as an excellent host city. We will lead or support advocacy campaigns to remove travel barriers and lobby efforts to expand and upgrade hosting facilities, services or infrastructure. We will continue to be the trusted intermediary for local leaders interested in organizing a national convention or hosting a major cultural event.

ACTIONS

1. Secure city-wide national conventions and cultural events.
2. Expand our activities in key national markets.
3. Provide services and leadership to smaller conventions (less than 350 delegates).
4. Outline or clarify key markets for expansion in the five year planning horizon.
5. Create an optimal event hosting environment in Saskatoon.
6. Promote awareness and partnerships with Conventions Saskatoon and Saskatoon Sports Tourism.





SPORTS TOURISM

Our strategic focus in Sports Tourism is to promote the attraction and retention of competitor and spectator-based sport events as well as non-competitive sport gatherings. To do this, we will continue to manage the day-to-day operations of Saskatoon Sports Tourism. This allows us to integrate the marketing efforts of Tourism Saskatoon, Saskatoon Sports Tourism and Conventions Saskatoon.

We will strive to support Saskatoon Sports Tourism in raising awareness of the economic and social benefits of sport tourism. We will work with shareholders, policy makers and sport organizations/associations to lobby for facility and policy improvements. We will be active participants in coordinating convention, sport, and event timing to ensure optimal and strategic use of our destination's facilities.

ACTIONS

1. Establish relationships with sport organizations and bid on sport events for Saskatoon.
2. Provide staff, resources and funding to support Saskatoon Sports Tourism activities.
3. Collaborate with the marketing departments to ensure sports marketing collateral is brand aligned.
4. Maintain regular communications with accommodation providers to ensure strategic alignment of events.



INTERNATIONAL CONVENTIONS & TRADESHOWS

Our key focus in International Conventions and Tradeshow is to promote Saskatoon as an excellent host city. We lead/support advocacy campaigns to remove travel barriers, as well as lobby efforts to fund expansion and upgrade of hosting facilities, services, or infrastructure.

We are the trusted intermediary for local leaders interested in organizing new events or bidding on existing international conventions and tradeshow. We concentrate on positioning Saskatoon as a prime Canadian destination for conventions—particularly those that play into our economic strengths: agriculture, energy, natural resources, mining, life sciences, and research.

ACTIONS

1. Secure city-wide international conventions and tradeshow.
2. Expand our presence at key international trade events.
3. Provide services and leadership to smaller conventions.
4. Build awareness and relationships with local organizations to promote international convention assistance.
5. Promote awareness and partnerships with Conventions Saskatoon and Saskatoon Sports Tourism.



We believe there is an economic benefit to actively engaging Saskatoon citizens as ambassadors to marketing and promoting the city.



TourismSaskatoon

TOURISMSASKATOON.COM

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