

# DESTINATION SUSTAINABILITY: PLANNING FOR THE UNKNOWN IN 2021 AND BEYOND







## TABLE OF CONTENTS

Executive Summary	3
What the Unique Value Proposition of DMOs/CMOs?	4
Scenario Marketing	6
DMO/CMO Organizational Sustainability	7
Destination Advocacy	8
Planning for 2021 and Beyond	10
Appendix	12

# EXECUTIVE SUMMARY

The year 2020 will be remembered as one of the most challenging periods for the tourism industry, in Canada and worldwide. At the onset of the COVID-19 pandemic, Tourism Saskatchewan and industry partners, including destination and city management/marketing organizations (DMOs/CMOs), began meeting virtually, on a bi-monthly schedule, to tackle serious issues head on and plot innovative, collaborative solutions for tourism recovery. The DMO/CMO meetings created a space to share ideas, align strengths and work co-operatively.

In December 2020, Tourism Saskatchewan's Industry Development Team hosted a virtual DMO/CMO Forum with a facilitated session to empower partners, despite the challenges imposed by COVID-19. The forum aimed to strengthen connections with industry; expand opportunities for dialogue and networking; and provide solutions and strategies to thrive as destination marketing/management organizations that bring value to stakeholders.

Representatives of the following organizations participated in the forum:

- Cypress Hills – Grasslands Destination Area
- Destination Battlefords
- Economic Development Regina - Tourism Regina
- Lloydminster Economic Development
- Regina Hotel Association
- Tourism Estevan
- Tourism Melville
- Tourism Moose Jaw
- Tourism Saskatoon
- Tourism Saskatchewan
- Tourism Swift Current
- Tourism Weyburn
- Watrous – Manitou Marketing Group
- Whitecap Dakota First Nation

The DMO/CMO Forum was facilitated by Albert Jame, Design Thinking Thought Leader at zu.com. Jame led the group through a series of exercises that involved Design Thinking concepts and scenario planning exercises to address the following questions:

- How might communities and destinations advocate better for the tourism industry?
- Provided with two different scenarios in terms of the future impacts on potential COVID-19 regulations, what should marketing and communication efforts look like?
- How do we work toward organizational sustainability with fewer resources?
- What are the unique value propositions of DMOs/CMOs?
- What type of information and data would help in these efforts?
- How do we plan for 2021?

This report is a comprehensive record of the Information gathered from participants. Its sections detail participant feedback regarding tourism challenges, scenario marketing/messaging, sustainability and advocacy. A planning template (p. 11) is included to assist with identifying immediate priorities and actions for the current year and into the future.



# WHAT'S THE UNIQUE VALUE PROPOSITION OF DMOs/CMOs?

Forum participants discussed issues that impede tourism and compromise an area's value proposition. Their comments and responses are listed under four categories:

- Tourism Businesses
- Non-Tourism Businesses
- Community Members
- Tourists

## TOURISM BUSINESSES

### Needs:

- No business restrictions
- Customers
- New revenue streams
- Sales
- Expansion
- Market-ready help

### Pain Points:

- Closed borders
- Restrictions
- Infrastructure help
- Sales

### Frustrations:

- Constant changing of regulations
- Lack of awareness in new markets under new conditions
- Seemingly confusing or arbitrary rules - inconsistencies
- Needing to be open for business
- Constant uncertainty
- No/reduced business

**How are DMOs/CMOs important to tourism businesses? What do DMOs/CMOs solve for tourism businesses? What value to DMOs/CMOs bring to tourism businesses?**

- They are depending on DMOs/CMOs to relay current information
- Help them adapt to new normal
- Help them find ways to adjust their business model to increase business
- Assist with funding
- Pathfinding and support ideas/ growth through aligning organizational objectives
- Promoting COVID-19 compliance
- Helping explain best practices in time of COVID-19
- Get help when you need it
- Help to decipher what help is available to them
- Drive business to their door
- Assistance shifting through grants/ funding
- Helping source PPE and COVID-19 specific material
- Work with municipality to keep community members informed
- Consistent messaging and intel
- Knowledge regarding tourism trends
- Businesses are better at managing risks than individual households
- Assisting in developing appropriate messaging
- Collaborative marketing

## NON-TOURISM BUSINESSES

### Needs

- Information on how they can become part of the local tourism community
- How to build back better – How can businesses rebuild in a sustainable and long-term way?
- Understanding restrictions and how they apply to their businesses

**How are DMOs/CMOs Important to non-tourism businesses? What are DMOs/CMOs trying to solve for non-tourism businesses? What value do DMOs/CMOs bring to non-tourism businesses?**

- Indirectly bring business to them via new tourists to the community
- Be a catalyst for connecting with organizations in the visitor economy
- Connecting them with the resources and assistance typically presented to tourism businesses
- Revisit membership criteria; open DMO to all business and events

# WHAT'S THE UNIQUE VALUE PROPOSITION OF DMOs/CMOs?

## COMMUNITY MEMBERS

### Pain Points

- Lack of understanding of the importance of tourism
- Lack of information on the role of tourism in the broader economy, beyond traditional tourism to enhance cross promotion and investment in the sector
- Lack of understanding on roles and variety of partners and organizations – Who is doing what?

### Frustrations

- Lack of COVID-19-friendly outdoor activities
- Confusing guidelines
- Too many people from outside the community

### How are DMOs/CMOs important to Community members? What do DMOs/CMOs solve for Community Members? What value do DMOs/CMOs bring to Community members?

- Help them to understand the value of tourism
- Local awareness of what is in their backyard
- Create community ambassadors to help promote what the community has to offer
- Encourage residents to be part of the overall experience authenticity
- Educate on benefit of expanding local economy
- Be consistent with relationships and set partner expectations to encourage successful project outcomes
- Connect with organizations that have similar organizational objectives and values
- Shop local initiatives

## TOURISTS

### Needs

- What experiences are available?

### Frustrations

- Not finding what they need on a DMO/CMO site as a potential visitor
- Too many restrictions
- Travel not being promoted during pandemic

### How are DMOs/CMOs important to tourists? What do DMOs/CMOs solve for tourists? What value do DMOs/CMOs bring to tourists?

- Suggest safe activity options
- Help them plan during an uncertain and changing time
- Create programs for family groups: outdoor activities
- Future vacation opportunities
- Provide up-to-date and consistent information
- Keep awareness high – keep your DMO message consistent to set visitor expectations
- Understand their needs and patterns to serve them with better information
- Make it easy to spend money at local business

Forum participants reviewed two potential scenarios for the tourism sector (see Appendix for scenario details). The following chart plots identified markets and suggested messaging for each situation.

Who are the Key Audiences?	<b>Scenario 1: “Lockdown Lite”</b> <b>Primary</b> <ul style="list-style-type: none"> <li>- Moms</li> <li>- Locals</li> <li>- Members</li> <li>- Tourism businesses</li> <li>- Local community members</li> <li>- Local government</li> <li>- Municipal government</li> <li>- Non-member businesses</li> <li>- Producers with role in tourism (experience)</li> </ul> <b>Secondary</b> <ul style="list-style-type: none"> <li>- Neighbouring provinces</li> <li>- Day trip, regional</li> <li>- Municipal government</li> <li>- Provincial government</li> <li>- Non-members</li> <li>- Front-line health care workers</li> <li>- Large hotel resorts</li> <li>- Essential services shoppers</li> <li>- Event venues</li> <li>- Smaller hotels</li> <li>- Indigenous people</li> <li>- Regional community members</li> <li>- Provincial parks</li> <li>- Municipalities</li> <li>- Boulders’ large attractions on boards</li> </ul>	<b>Scenario 2: “Cautious Restart”</b> <b>Primary</b> <ul style="list-style-type: none"> <li>- Day trippers</li> <li>- Business travellers</li> <li>- Local customers</li> <li>- Interprovincial tourism</li> <li>- Domestic tourism</li> <li>- Sports tourism</li> </ul> <b>Secondary</b> <ul style="list-style-type: none"> <li>- International tourism</li> <li>- Event and festival attendees</li> </ul>
Key Messages for DMO/CMO primary audiences	<b>Local community members</b> <ul style="list-style-type: none"> <li>- Repeat safety messaging and clarity</li> <li>- Promote local businesses – what’s open</li> <li>- Create ambassadors for the community</li> <li>- Invest in your community</li> <li>- Visitor economy that benefits everyone</li> <li>- Safety first. Build confidence. Make them feel safe.</li> </ul> <b>Tourism businesses</b> <ul style="list-style-type: none"> <li>- Adapt and change business model</li> <li>- Supports that are available (financial, training, etc.)</li> <li>- We are open to help</li> </ul> <b>Members</b> <ul style="list-style-type: none"> <li>- How can we help and what we are currently doing?</li> <li>- Collaboration and create opportunities</li> <li>- We are listening</li> </ul> <b>Local/municipal government</b> <ul style="list-style-type: none"> <li>- Visitor economy has benefits to everyone; hardest hit and least understood</li> <li>- We are the solution – we are what people come to see</li> <li>- Participation – we need to hear from you</li> </ul> <b>Local non-member businesses</b> <ul style="list-style-type: none"> <li>- Education – explain connection to your local visitor economy</li> <li>- It is easy. We can help you and not give you more work</li> <li>- A rising tide floats all boats</li> </ul>	<b>Tourists (domestic and interprovincial)</b> <ul style="list-style-type: none"> <li>- Safety and openness</li> <li>- Product awareness</li> <li>- What’s new</li> </ul> <b>Day Trippers</b> <ul style="list-style-type: none"> <li>- Availability and trip planning</li> <li>- Promoting add-on secondary attractions</li> </ul> <b>Local community members</b> <ul style="list-style-type: none"> <li>- Maintain local connection</li> <li>- Lessons learned</li> <li>- Visitors/tourists aren’t scary – maintain safety first</li> <li>- Work on our business</li> <li>- Continue to support local</li> <li>- Thank you</li> <li>- Remind them what they did before</li> </ul> <b>Local/municipal government</b> <ul style="list-style-type: none"> <li>- Continue to invest and advocate</li> <li>- Support for open businesses (i.e. event centres)</li> <li>- Apply months in advance for grants</li> </ul> <b>Local non-member businesses</b> <ul style="list-style-type: none"> <li>- Work on our business</li> <li>- We will continue to work with you providing support</li> <li>- Room for members and non-members</li> <li>- Safety first</li> </ul>

The forum provided an opportunity to discuss the sustainability of DMOs/CMOs and identify successes, challenges and potential considerations.

## What is working for DMOs/CMOs? What should DMOs/CMOs keep doing? What should other DMOs be trying?

- Working with the local chamber of commerce
- Engaging non-tourism businesses to help with marketing and idea generation
- Communicating with members
- Building back better and focus on the long-term growth of the sector as a whole
- Pilot project on destination sustainability
- Content development – shooting great video and still imagery
- Being open to new ideas and changes
- Being open and frank, and learning from each other as DMOs/CMOs
- Local packages (like Tourism Saskatoon)
- Working with an entry level travel media writer
- We have the community's attention
- Having Tourism Saskatchewan's support on new initiatives
- Focusing on our assets and strengths
- Engaging members in discussion at every board meeting
- Focus on one industry development gain at a time
- Being a community catalyst for collaboration
- Keep working together at the DMO/CMO level
- Local First movement, powered by ambassadors
- Setting attainable goals and sticking to them

## What is not working? What do DMOs need to stop doing?

### What is in the way?

- Long-term planning
- Other like-minded organizations continuing to work in silos
- Playing alone in the sandbox – need to get partnering
- What is the new way? Unrealistic thinking that your neighbouring DMO is your competition
- Transparency in roles and objectives between organizations
- Giving the impression that we can “save” the industry
- Trying to be everything to everyone – need to focus
- Trying to market any kind of tourism when the public is terrified
- Holding on to old attitudes and mindsets
- Worrying ourselves into a corner; negative language
- With so much information out there, it's easy to get overwhelmed
- Businesses that aren't members but should be
- Anything related to events or sports tourism is at a standstill
- Events
- Events, in person and digital. Zoom fatigue from work.

## What is something worth exploring for DMOs/CMOs?

### What do you think might work for DMOs/CMOs?

### What is showing potential for DMOs/CMOs?

- Being inclusive
- Problem solving
- New funding models
- Safe outdoor COVID-19-friendly experiences
- Vacation packages that highlight our best
- Showing potential; diversifying to attract new customers
- Packaging – hotel, spa, treats for those suffering from COVID-19 fatigue
- Embracing winter and turning those into great Saskatchewan experiences
- Packaging and itineraries – this is low cost and can include non-traditional partners
- The opportunity to create partnerships
- Management rather than marketing – problem solving with partners
- Adapt and implement new technologies that reach the visitor better and that promote sustainability
- Is there opportunity to do innovative outdoor safe events?
- Helping businesses to learn adaptability measures
- Keep the support local momentum
- Destination development – so many untold stories
- Packaging
- Focusing on local/regional, even after the pandemic is behind us
- Develop that long term destination plan
- Package development

Many discussions have addressed the global trend of moving from a Destination Marketing Organization to a Destination Management Organization. While there is a collective agreement on the value of this trend, there is some uncertainty on what tactics and action can help them with this shift. Advocacy is an area that extends beyond destination marketing and an issue that comes up frequently in DMO/CMO group discussions. Forum participants offered a range of suggestions for meaningful and effective advocacy on the part of DMOs/CMOs. Asterisks denote order of importance, as shared by delegates.

## How might we work together better as a region?

- Promote each other \*\*\*\*
- Partner together for combined packages. Visit 2 or 3 cities with one package \*\*\*
- Encourage experiential local day trips \*\*
- Promote the community together \*\*
- Work with the chamber of commerce to promote businesses \*\*
- Joint marketing ventures \*\*
- Cross promote on respective challenges \*\*
- Common branding – one Saskatchewan story with many voices \*\*
- Regional contesting \*\*
- Leverage marketing dollars through partnerships \*
- Identify areas of common concern and voice them collectively \*
- Relationship with local Economic Development Officer \*
- Attend planning committee meetings \*
- Having representatives from various boards sit in on various meetings \*
- Align with strengths of Provincial and National organizations (Business Events Canada, Destination Canada, Tourism Saskatchewan) \*
- Ongoing communication practices (meetings, etc...) \*
- Jointly collect data to better understand market trends \*
- Don't be scared to see what's working for someone else and stop trying to reinvent the wheel \*
- Host bi-weekly check-ins \*
- Partner with nearby destinations \*
- Package complimentary business/experiences together \*
- Regional itineraries \*



# DESTINATION ADVOCACY

## How might we get the community supporting the tourism economy?

- Create local ambassadors \*\*\*\*\*
  - Foster experience in non typical situations \*\*\*
  - Remind them that the pandemic showed us what happens when tourism is not available \*\*\*
- Engage local influencers to create content on their local adventures and encourage social sharing \*\*
  - Make finding information about things to do easy to access and attractive \*\*
  - Impact of shopping local 50 per cent of the time vs 75 per cent \*\*
  - Getting local influencers to share content \*\*
  - Attract volunteers to help with hosting events \*\*
  - Fund large capital projects with infrastructure \*\*
  - Tell community stories \*\*
  - Educate and inform of current impact \*
  - Tell stories about how their support impacts business \*
  - Provide information on safety \*
  - Bring non-traditional partners together\*
  - Package options and create itineraries \*
  - Encourage businesses to get involved in their community \*
  - Local participation incentives (i.e. coupons, stamp cards, etc.) \*
  - Local ad campaigns showcasing economic impact \*
  - Offer special promotions to get locals out and enjoying the destination \*
  - Provide initiatives for visitors to give back to the community \*
  - Connect tourism to social causes that benefit the community \*
  - Communicate tourism experiences as a part of quality of life and quintessential to localhood \*
  - Grow experiences and products with locals first – What would a local want to do here? Then ripple outward \*
  - Pride of place \*
  - Demonstrate economic value and chance since COVID-19 \*
  - Establish new exciting experiences \*
  - Share our stories locally \*
  - Pride of place \*
  - Use real life examples of how the community gives to tourism without realizing it \*
  - Invest in capital infrastructure that fosters business growth \*
  - Engage community in interactive activities, create community pride \*
  - Community mail outs \*

## How might DMOs/CMOs demonstrate value to our municipal partners?

- Play them the movie “2020 – A year wno tourism” so they never forget how awful it was \*\*\*
- Provide data \*\*\*
- Consistent, aligned messages from a variety of partners (attractions, hotels, venues) \*\*
- Utilizing research and statistics to show how tourism impacts the community and business\*\*
- Demonstrate worst-case scenario – What does our downtown looks like with no tourism centric businesses? \*\*
- Make the connection with community leisure activities to tourism opportunities \*\*
- Know your area and region and the assets (asset mapping) \*\*
- Honest communication and transparency \*\*
- Be honest \*\*
- Support municipal economic development initiatives \*\*
- Demonstrate confidence in recovery plan (don’t scramble) \*\*
- Revenue and financial information \*
- Show correlation between tourism/jobs/quality of life and population growth \*
- Communicate role of CMO/DMO in relation to the local government
- We promote the work that they do \*
- Economic development value \*
- Demonstrate ROI values\*
- Measure economic and social impacts \*
- Promote region rather than boundaries to form relationships with surrounding RMs \*
- Provides stats and analytics to decision makers \*
- Show the importance of our work...what would happen if DMOs/CMOs didn’t exist \*
- Design programs that boost their business by being a partner \*

Participants undertook the daunting tasking of planning for the unknown – Summer 2021.  
Using Scenario #2 “Cautious Restart” participants listed some key priorities and key tasks for 2021.

## PRIORITY

Enhance Membership and non-membership participation in strategic initiatives

## TASKS

- Industry out reach in our region
- Create a membership value program that speaks to the many members and potential members we have
- Create opportunities to learn and connect together

Continue to education/advocate for the importance of the visitor economy

- Create marketing campaigns that educate and inspire
- Work to grow/build positive resident sentiment around tourism and the visitor economy
- Work with and build relationships with government at all levels (municipal, provincial, federal)

Experience Development

- Secure funding
- Work to enhance current experiences
- Create new experiences and partnerships

Opening the market to neighbouring provinces

- Increase staff hours
- Social media/website work
- Packaging, contests, etc.

Restarting events

- Working with organizers
- Liaison with communities
- Promotion and ticket sales

Growing membership

- Information program
- Site visits
- Answering the question – What’s in it for us?

Positioning the city to welcome back events

- Social media campaign
- Continue to partner with health authority
- Work with local partners

Renewed activation plan

- Marketing before, during and after events
- Sharing event unique value proposition
- Thinking differently with all partners and stakeholders

Overall destination plan and community brand

- Continued alignment
- Focus on safety
- Place branding

Promoting hotel stays

- Facebook content
- Consistent messaging
- Updating websites

Retaining membership

- Advocacy
- Prove ROI
- Communication and listening

Group bookings

- Building relationships
- Create and maintain marketing toolkit

Continue with community engagement

- Ambassador programs
- Create awareness of how the community has changed
- Encourage staycations

Help promote what the community has to offer

- Work with local businesses and groups
- Help promote new business models
- Work with the chamber to promote community business

Use the following template to plot additional priorities and actions to consider.

What are your key priorities?

1.
2.
3.

What are the top 3 tasks within these priorities

1.

1.

1.
2.

2.

2.
3.

3.

3.

# APPENDIX

## SCENARIO 1: JANUARY/FEBRUARY 2021

## SCENARIO 2: JULY/AUGUST 2021

<b>COVID-19 Status</b>	Case numbers are increasing. Saskatchewan and the world are dealing with the second wave. Hospitalization numbers are growing.	Case numbers are declining. The vaccine is ready and being distributed.
<b>Border</b>	Canada/U.S. border is still closed to non-essential travel. Non-essential travel between provinces is stopped.	Canada/U.S. border is open. Travel across Canada is open and freely flowing.
<b>Airlines</b>	The volume of passengers travelling international and domestic has increased slightly compared to April 2020. Still at 50 per cent of 2019 level.	The volume of passengers traveling international and domestic has increased dramatically at 90 per cent of the 2019 level.
<b>Health Restrictions</b>	Saskatchewan has the following health restrictions: <ul style="list-style-type: none"> <li>- Mandatory mask in indoor public spaces</li> <li>- Gathering limit of 20 people indoor and outdoor</li> <li>- Must maintain three metres of physical distance</li> <li>- Bars and restaurants can only offer takeout</li> </ul>	Saskatchewan health restrictions have been lifted.
<b>Federal Support</b>	Federal income support continues.	Federal support has stopped.
<b>Provincial Support</b>	Support for tourism specific businesses through the Saskatchewan Tourism Sector Support Program (STSSP) was provided to fall/winter dependent businesses. May 2021 relaunch of the STSSP .	Provincial support has stopped.
	Province provides another \$5,000 bridge support for businesses that are closed.	
<b>Destination Canada</b>	Destination Canada continues to support domestic tourism marketing.	Destination Canada is targeting international travellers.
<b>Travel Sentiment</b>	Travel confidence remains low. People are not willing to travel long distances and they do not want others to visit their community in large numbers.	Travel confidence is high. People feel safe to travel and welcome visitors.
<b>Tourism Supply</b>	The supply of tourism businesses has remained stable, though we have seen some closures over the last year.	Supply is short as we have seen some closures; however the demand is high.
<b>Hotel Occupancy</b>	Hotel occupancy is around 35 per cent.	Hotel occupancy rate is at 55 per cent. <ul style="list-style-type: none"> <li>- Business travel is still low, a decrease of 20 per cent, and most businesses have changed how they conduct business (zoom). Travel budgets for businesses have been cut.</li> <li>- Leisure travel is returning as the weather gets warm, but they are also traveling to more sought-after domestic and international destinations.</li> <li>- Events and festivals are struggling to acquire corporate sponsorship receiving only 70 per cent of 2019 levels.</li> <li>- Meetings and Conventions are changing. Conventions are offering hybrid models (online and in-person), attracting fewer people to the destination.</li> </ul>



# NOTES

