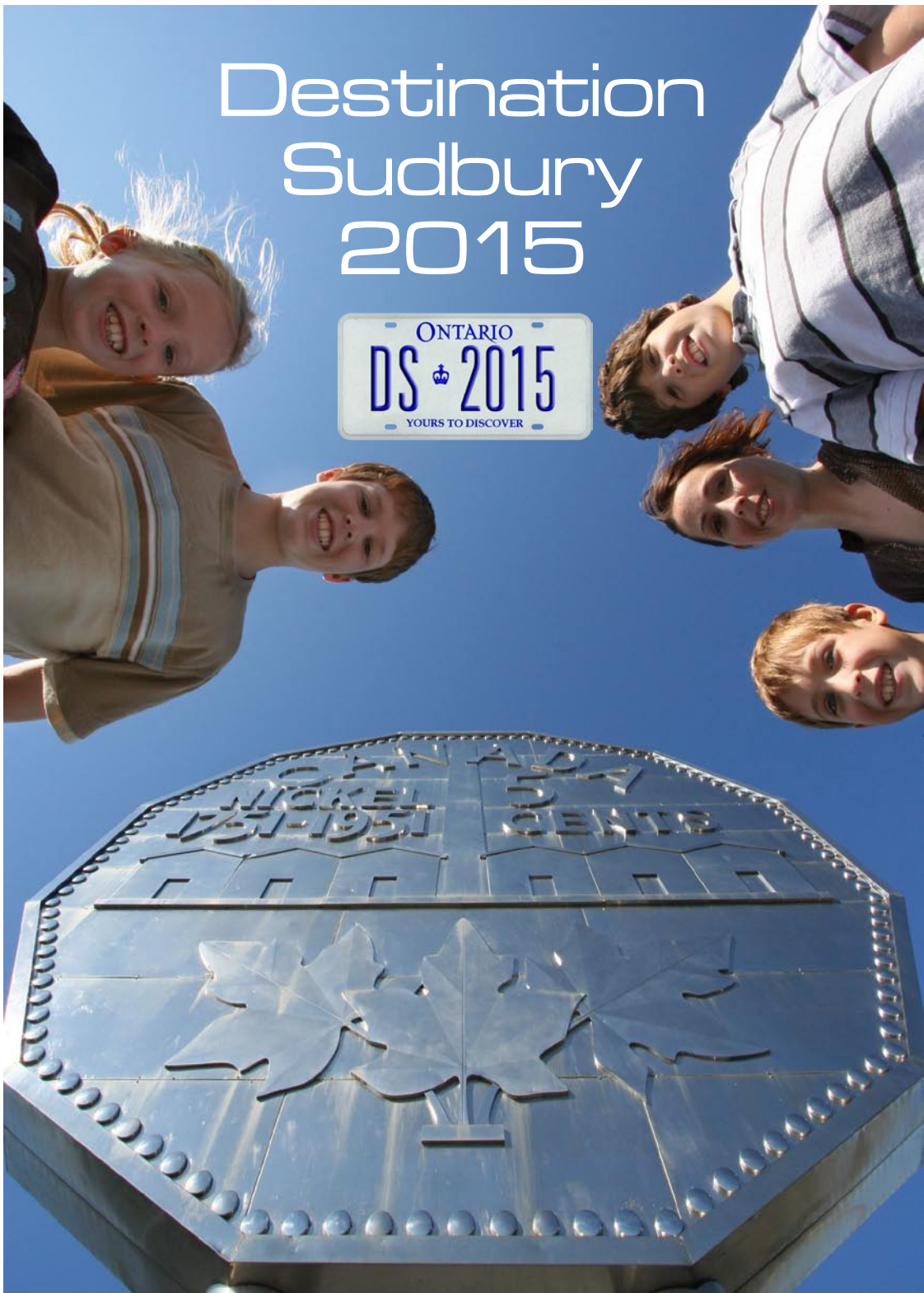


Destination Sudbury 2015



Prepared for **Sudbury Tourism**
By **Lloyd Research & Haynes Marketing**
2008

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Table of Contents

Introduction	3
Background	4
Organizational Development	
Objective 1: Expand Membership and Strengthen Coordination of Effort	7
Objective 2: Create New Sources of Revenue	8
Objective 3: Become the “Voice of Tourism” for Greater Sudbury	9
Objective 4: Become Proactive in Product Development, Innovation and Investment Attraction	10
Objective 5: Focus on the Customer	11
Strategic Marketing	
Objective 1: Ensure that Decisions are Research-Based	12
Objective 2: Distinguish our Competitive Advantages	13
Objective 3: Target “Best Bet” Markets	14
Objective 4: Coordinate Marketing Communications Activities	15
Objective 5: Leverage the Internet and Emerging Technologies	16
Objective 6: Build and Leverage Strategic Marketing Partnerships	17
Objective 7: Bundle and Package Products and Services	18
Closing	19
Appendix I	
Sudbury Tourism Partners (2008)	20
Appendix II	
Map - Origins of Overnight Visitors	21
Appendix III	
Integrated Marketing Communications (IMC) Model	22

INTRODUCTION

Approach and Methodology

Recent Planning Initiatives:

Coming of Age in the 21st Century (2003) – an Economic Development Strategic Plan for Greater Sudbury that targeted tourism as one of five community economic growth engines.

The *Premier-Ranked Tourism Destination* (PRTD) report (2005) provided a comprehensive inventory and analysis of Greater Sudbury's tourism strengths, gaps and areas for improvement.

Tourism Opportunities for the City of Greater Sudbury: A Research Report (2005) focused on the market and consumer demand for Greater Sudbury tourism products with a view to expanding the product base and increasing market potential.

Greater Sudbury Tourism Forum (2007) invited participants to share their feedback, concerns, suggestions and ideas for the tourism industry as part of the development of the long-term tourism strategy.

These documents are available through Sudbury Tourism.



Purpose of the Strategic Plan

The purpose of the Sudbury Tourism Strategic Plan is to develop a collective tourism vision and provide a roadmap to 2015 for the community, Sudbury Tourism partners, its clients and stakeholders. The strategic plan will also address elements related to nurturing and sustaining a positive image and experience for tourism as well as developing a community-wide understanding of the importance of tourism to the local economy. As stated at the September 2007 Tourism Forum, a long-term tourism strategic plan will:

- Ensure continuity of commitment to the tourism industry
- Assist with tourism marketing, destination management, and business development.

The plan will also serve as a basis for the development of Sudbury Tourism annual marketing plans and communication strategies.

The Approach

In preparation for the long-term strategic plan, recent planning documents were reviewed in detail. The information contained in these reports formed the basis for developing the *Sudbury Tourism Strategy: Background and Situational Analysis* – an overview of visitor trends and product analysis in Greater Sudbury.

A draft of the *Northern Ontario Tourism Roadmap for Renewal*, a five-year tourism marketing strategy (2008- 2012), was also reviewed to ensure that the plan would be conceived and aligned, where possible, with the broader recommendations of the Ontario Tourism Marketing Partnership Corporation (OTMPC).

Given the quantity and quality of information generated in these reports, the strategic planning process focused on responding to the following questions:

- **How will Sudbury Tourism support its day-to-day organizational efforts? How will it implement the recommendations of the strategic plan as well as those of other planning initiatives?**

Understanding that the strategic plan would also lead to the development of Sudbury Tourism annual marketing and communication strategies, the planning process also addressed:

- **How will Sudbury Tourism address the competitive marketplace?**

A half-day briefing session was held with the Tourism Strategy Working Group (TSWG) to confirm the approach and process for the two-day workshop. Thirty participants attended the workshop, including Sudbury Tourism staff, partners, and representatives from FEDNOR and the City of Greater Sudbury. The outcomes and findings of the workshop were presented to the TSWG for discussion at subsequent meetings.

BACKGROUND

Economic benefits of Tourism in Greater Sudbury:

- 1.37 million visitors
- 805,016 overnight visits
- \$175 million in visitor spending
- 2,045 jobs created (full-time, part-time and seasonal)
- \$76.3 million in total taxes generated including \$1.25 million in municipal taxes.

Source: CTS 2004, OMT - CD53

Where are we now?

Since municipal amalgamation in 2001, Sudbury Tourism, has been the City's Destination Marketing Organization (DMO). Currently, Sudbury Tourism comprises the City of Greater Sudbury and a cooperative body of more than 70 private and public sector members that pool their resources to promote the tourism industry in Sudbury.

The primary goal of Sudbury Tourism is to attract visitors through annual destination marketing activities that target specific sectors including leisure travel, group and bus tours, meetings and conventions and sporting events. The City of Greater Sudbury, in consultation with its partners, also performs a number of destination management functions such as:

- Managing Visitor Information Centres
- Hosting industry forums
- Initiating research and planning projects
- Facilitating community infrastructure projects
- Addressing signage and other tourism related issues.

The City of Greater Sudbury through the Greater Sudbury Development Corporation (GSDC) contributes the bulk of the resources and dollars to support the destination management and marketing activities of Sudbury Tourism. Industry partners, through their membership in Sudbury Tourism, make substantial contributions too! In 2008, the operational and marketing budgets totalled over \$800,000.

Based on the PRTD criteria, the City of Greater Sudbury earned an "A+ or above average" rating.

Geographically, Sudbury is uniquely positioned as a tourism destination for both Southern and Northeastern Ontario markets. Visitor attractions include:

- Science North and Dynamic Earth, two of Canada's largest and most innovative science centres
- A robust infrastructure of festivals and events
- A burgeoning arts and entertainment community
- A diverse ethnic and multi-cultural community
- A strong bilingual community at the centre of Franco-Ontarian culture
- A full-service shopping centre serving Northeastern Ontario
- A host of brand name accommodations and varied dining experiences
- Accessible outdoor experiences with 330 lakes, numerous parks, trails and recreational areas.



BACKGROUND

Vision Statements:

Greater Sudbury will be one of Ontario's top four visitor destinations.

Mission Statement:

Sudbury Tourism is a membership-based organization that combines and coordinates the expertise and financial resources of Greater Sudbury's tourism businesses, associations and operators to:

- Contribute to the industry's growth and sustainability
- Raise awareness of Greater Sudbury as a tourism destination
- Support high quality product development and market readiness of tourism opportunities in Greater Sudbury.

Overall Objectives:

- Increase visitations.
- Increase length-of-stay.
- Increase visitor spend.
- Increase repeat visitations.
- Enhance the contribution of the tourism sector to the Greater Sudbury economy.

Where do we need to go?

Dubbed *Destination Sudbury 2015* (DS2015), the two-day workshop and subsequent meetings with the Tourism Strategy Working Group (TSWG) included developing the vision and mission statements for Sudbury Tourism.

The vision statement, originally created during the *Coming of Age in the 21st Century* strategic planning process, was adopted by the TSWG and workshop participants.

The mission statement clearly reflects the interests of partners in becoming more involved in the overall destination management aspect of the Greater Sudbury tourism industry – from training, infrastructure development and investment attraction, to research, product development and community awareness.

Overall objectives were also set to focus the development of goals, supplementary objectives and actions of the strategic plan.

What's the best way to get there?

Does Sudbury Tourism have the right structure to implement and support its day-to-day operations and marketing efforts?

What type of organizational model is required to become one of Ontario's top four visitor destinations?

Will the future trajectory of Sudbury Tourism demand a more formal governance model?

Throughout the DS2015 strategic planning process, it was clear that tourism is much more than simply destination marketing. It's also about destination management.

With this in mind, two goals (general statements about what the Sudbury tourism industry needs to accomplish to meet its mission, vision and address major issues) were identified under the two strategic areas of Organizational Development and Strategic Marketing.

In addition, objectives (activities that will be required to ensure the effective implementation of the strategy) were identified for each goal as follows.



BACKGROUND

ORGANIZATIONAL DEVELOPMENT

Goal – Enhance organizational capacity and effectiveness

Objectives Summary:

1. Expand membership and strengthen coordination of effort
2. Create new sources of revenue
3. Become the “voice of tourism” for Greater Sudbury
4. Become proactive in product development, innovation and investment attraction
5. Focus on the customer

STRATEGIC MARKETING

Goal - Develop and implement strategic marketing programs

Objectives Summary:

1. Ensure that decisions are research based
2. Distinguish our competitive advantages
3. Target “best bet” markets
4. Coordinate marketing communications activities
5. Leverage the internet and emerging technologies
6. Build and leverage strategic marketing partnerships
7. Bundle and package products and services

Action items were attached to each objective. These actions have been identified either by workshop participants, the TSWG and/or are the widely accepted recommendations of previous tourism reports.

Cascading from the tourism strategy, priorities, timelines and responsibilities for the various actions will be determined and, as required, sub-committees will be formed to oversee their implementation.

The following provides a more detailed description of each objective, a synopsis of current issues/opportunities, planning imperatives and action items.



ORGANIZATIONAL DEVELOPMENT

Strategic Goal : Enhance Organizational Capacity and Effectiveness

Objective 1:

Expand Membership and Strengthen Coordination of Effort

Action:

1. Explore other organizational models.
2. Conduct an organizational review to:
 - Determine the structure necessary to implement and support day-to-day operations
 - Determine if the future trajectory of the organization will demand a more formal governance model.
3. Establish a Membership sub-committee to:
 - Clearly define the benefits of membership and evaluate the partnership 'value proposition' and pricing structure
 - Identify new prospects and referrals
 - Undertake a membership drive.
4. Improve lines of communication between members.

Situation :

Sudbury Tourism consists of more than 70 members¹. The members make annual financial contributions to promote Sudbury, as well as provide direction for annual marketing expenditures. Formal partnership meetings occur monthly and members also participate in committees.

Issues / Opportunities :

- The *Premier Ranked Tourism Destination* (PRTD) report identified some 300 potential tourism partners within Greater Sudbury and ample capacity to increase membership.
- Meetings and communications between members need to be more inclusive to achieve greater consensus on destination management and marketing initiatives.
- Greater participation from “decision-makers” is required at both general and sub-committee meetings.

Planning Imperatives :

Sudbury Tourism will need to expand its membership and strengthen coordination of effort to:

- Build a critical mass of representation across all aspects of the tourism and related industries
- Increase the sharing of knowledge, ideas and research
- Facilitate networking and joint marketing opportunities
- Maximize opportunities for alliances and collaboration
- Fulfill the requirements of an expanded committee structure
- Optimize opportunities for bundling and packaging
- Become a strong and recognized voice for tourism in Greater Sudbury.

¹ Sudbury Tourism members (2008) are listed in Appendix I



ORGANIZATIONAL DEVELOPMENT

Strategic Goal : Enhance Organizational Capacity and Effectiveness

Objective 2:

Create New Sources of Revenue

Action:

1. Develop a formal business plan to define revenue requirements.
2. Explore opportunities for government funding at the municipal, provincial and federal levels.
3. Identify and evaluate new means of financing by:
 - Revisiting existing membership categories and fee structure.
 - Researching the revenue generation models of other tourism organizations to determine lessons learned and best practices.

Situation:

Presently, the Sudbury Tourism annual operational and marketing budget (\$800,000+) is generated from annual contributions from the City of Greater Sudbury and membership fees from local industry partners.

Issues / Opportunities:

- In comparison to other destinations, including cities within Northern Ontario, Sudbury Tourism's budget is under-funded.
- A number of competitive destinations have annual budgets that are two to three times greater, largely as a result of implementing a Destination Marketing Fee (DMF) – a fee on accommodation and an effective and sustainable way for Destination Marketing Organizations to raise operating funds.

Planning Imperative:

New sources of revenue will be required to increase competitiveness and support future destination management and marketing activities.



ORGANIZATIONAL DEVELOPMENT

Strategic Goal : Enhance Organizational Capacity and Effectiveness

Objective 3:

Become the “Voice of Tourism” for Greater Sudbury

Action:

1. Establish a Host market sub-committee.
2. Identify channels and develop processes and best practices to help define and shape official tourism policies and positions for the industry.
3. Develop annual in-market events and marketing programs to:
 - Elevate the profile of tourism within the community
 - Encourage and support community organizations in hosting meetings, conventions and sports events
 - Encourage the host market to promote Greater Sudbury attractions to visiting friends and relatives.

Situation:

As the Destination Marketing Organization (DMO) for Greater Sudbury, Sudbury Tourism represents the industry by responding to media requests and contributions to tourism news and editorial features. Locally, it has initiated programs such as “Invite the World” to encourage local service clubs and sports organizations to host events in Greater Sudbury.

Issues / Opportunities:

- Given its present resources, Sudbury Tourism is limited in its ability to proactively advocate for the tourism industry and implement local marketing strategies.
- While tourism is recognized as an economic growth engine for Greater Sudbury, there is a lack of awareness of the impact of its contributions to the local economy.
- Greater focus on internal marketing is required to take further advantage of Greater Sudbury’s strong visiting friends and relatives (VFR) market as well as opportunities in the meetings and conventions and sports events sectors.

Planning Imperatives:

Sudbury Tourism will need to develop a more proactive stance and strong unified voice to:

- Foster collaborative and consultative processes between the tourism industry and the community
- Promote the benefits and economic impact of the tourism industry on the local economy
- Influence and support political decision-making as it relates to the tourism industry.



ORGANIZATIONAL DEVELOPMENT

Strategic Goal : Enhance Organizational Capacity and Effectiveness

Objective 4:

Become Proactive in Product Development, Innovation and Investment Attraction

Action:

1. Develop the criteria and organizational framework (policies, processes and best practices) to effectively explore and support product development, innovation and investment attraction.
2. Focus on new product initiatives that can attract new markets and audiences, support our unique proposition(s) and be effectively packaged with existing assets.
3. Develop the tools to assist new tourism enterprises in investment and start up.
4. Focus on market research i.e. surveys, database capture, focus groups and other qualitative methods to support decision-making and evaluation efforts.



Situation:

Greater Sudbury has shown positive signs of product renewal with significant investment in the attractions and accommodations sectors. However, recent reports including the *Premier Ranked Tourism Destination* (PRTD) and *Tourism Opportunities for the City of Greater Sudbury: A Research Report* have identified product opportunities and gaps within the present tourism infrastructure.

Issues / Opportunities:

While many of these recommendations are in place or under development, several areas require attention including:

- Creating a clear focus for the “Outdoors Cluster”
- Developing the full potential of Greater Sudbury as a bilingual community and centre of Franco-Ontarian culture
- Addressing gaps in the accommodation sector e.g. 5 star accommodation, and youth hostel
- Encouraging investment in supporting attractions
- Mitigating issues that restrict individual operators e.g. liability insurance
- Addressing Visitor Information Centre issues i.e. location and functionality
- Exploring new opportunities for organized bus tours, self-guided tours and access to and from attractions e.g. shuttle services.

The present structure of Sudbury Tourism lacks the organizational framework and market research capabilities to effectively address these and other issues.

Planning Imperative:

Marketing alone will not sustain visitor growth. Moving forward, there is a need to take a more proactive stance towards developing new products, ensuring that existing assets are responsive to evolving consumer demands, and attracting new tourism investment to the community.

ORGANIZATIONAL DEVELOPMENT

Strategic Goal : Enhance Organizational Capacity and Effectiveness

Objective 5:

Focus on the Customer

Action:

1. Establish a formal Ambassador Program.
2. Host tourism orientation sessions and familiarization excursions for front line personnel and volunteers.
3. Develop survey tools to gauge visitor satisfaction.

Situation:

The tourism industry in Greater Sudbury has grown dramatically over the past decade – largely due to a product-driven focus. While this has been instrumental in positioning Greater Sudbury as a competitive visitor destination, there is a need to focus on the needs and desires of visitors in making future decisions.

Issues / Opportunities:

- Decisions are often driven by the industry's capacities or capabilities rather than by the desires of customers.
- There is a scarcity of research and marketing intelligence available to assist partners and planners in gauging the behaviours and perceptions of visitors to Greater Sudbury.
- Customer service requires greater emphasis on professional, knowledgeable and highly-trained front line personnel.

Planning Imperative:

Sudbury Tourism will need to embrace a market-driven approach that communicates and fosters a customer-centric focus – one that demonstrates that “great northern hospitality” throughout all touchpoints of the visitor experience, from arrival to departure.



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 1:

Ensure that Decisions are Research Based

Action:

1. Use traditional and internet database capabilities to capture visitor and prospect data.
2. Share this data with the local tourism industry as well as other provincial and national tourism partners.
3. Test new market opportunities using qualitative and quantitative methods such as focus groups and telemarketing surveys.
4. Work with provincial and national tourism partners to improve delivery of market research and information.

Situation:

The majority of tourism data available to Sudbury Tourism is obtained from various sources such as *Statistics Canada*, *Travel Activities and Motivation Studies (TAMS)*, and Canadian and International Travel Surveys. With the exception of Science North visitor surveys, local accommodation data and infrequent tourism research commissioned specifically by the local tourism industry, the available market intelligence addresses the broader Northern Ontario market and is not specific to Greater Sudbury.

Issues / Opportunities:

- The need for up-to-date and timely market research and information is a priority. To effectively plan for the future, the tourism industry will need to explore new methods of obtaining market data. Note: Market and target audience information referenced for this strategic plan dates as far back as 2004.
- Sudbury Tourism lacks an internet marketing strategy with the database capabilities to capture more timely market information.
- Individually, Sudbury Tourism partners and other members of the local tourism industry have access to a wealth of market intelligence, however this information is not actively shared.

Planning Imperatives:

An enhanced focus on market research is required to:

- Determine market trends and their implications for the local tourism industry
- Target marketing activities to achieve the best return on marketing investment
- Support product development, innovation and investment opportunities
- Evaluate visitor profiles, decision-making, behavior, awareness and perceptions of the destination.



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 2:

Distinguish our Competitive Advantages

Action:

1. Develop a “Brand” sub committee.
2. Conduct primary consumer research to determine perceptions of Sudbury as a visitor destination, evaluate existing and previous brand concepts
3. Pre-test a short list of singular concepts that sell the emotional benefits of the tourism experience in Greater Sudbury.
4. Institute a brand management strategy.
5. Develop and maintain a strong inventory of professional photography to support unique value propositions.

Situation:

The Sudbury Tourism unique proposition – that distinct and appealing idea that sets it favorably apart from competitors – has varied to keep pace with the introduction of new products and promote special attractions and events. In recent years, the unique proposition, similar to (and often interchangeable with) market positioning and brand promise, has included *Fun-Filled*, *Family-Friendly* and *Big Change, Big Celebration*. The visual strategy has centred on people enjoying distinctive Greater Sudbury experiences such as canoeing on Ramsey Lake, Big Nickel and Science North.

Issues / Opportunities:

- Like Northern Ontario, Greater Sudbury lacks a strong brand image for tourism.
- The tourism industry in Sudbury has two distinct markets – Southern Ontario and Northeastern Ontario. While Southern Ontario market segments may wish to escape to the great outdoors, Northeastern Ontario market segments will be attracted to other features such as Science North and shopping. As a result, two unique propositions may be required.
- The broader promotional efforts of the *Canadian Tourism Commission* (CTC) and the *Ontario Tourism Marketing Partnership Corporation* (OTMPC) will maintain an outdoor focus. To take advantage of this “cascading” approach, will Sudbury’s unique proposition and visual strategy need to be outdoor-focused too? Is the “Outdoors cluster” market-ready?
- While Sudbury Tourism has significantly expanded its photographic library, there is a lack of visual images depicting people experiencing local attractions.

Planning Imperative:

Sudbury tourism will need to differentiate itself from competitive destinations by developing a well-defined and focused brand positioning(s) with consistent applications across all aspects of marketing communications programs.



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 3:

Target “Best Bet” Markets

Action:

LEISURE MARKETS

1. Concentrate marketing efforts in Northeastern and Central Ontario.
2. Selectively target Southern Ontario “best bets” markets based on strong market research, e.g. focus groups and other qualitative methods.
3. Target Greater Sudbury residents who host visiting friends and relatives and encourage them to share the Greater Sudbury tourism experience.
4. Use the internet to capture visitor profiles and monitor trends.

MEETINGS AND CONVENTIONS

1. Build and maintain database of local service organizations.
2. Coordinate efforts with local businesses, service clubs and not-for-profit organizations to attract new opportunities.

SPORTS EVENTS

1. Develop and maintain an inventory of Greater Sudbury sports facilities.
2. Coordinate efforts with various sports groups and other City departments to proactively attract tournaments.

TRAVEL TOURS

1. Develop sample itineraries.
2. Attend marketplaces and liaise with motorcoach companies.
3. Coordinate familiarization trips for tour operators.

Situation:

Overall, tourism volume in Northern Ontario has remained static for a number of years, particularly for those regions that rely on U.S. visitors. However, with its proximity to Central and Southern Ontario markets and its position as a regional centre for Northeastern Ontario, Greater Sudbury has experienced slight increases. The greatest number of overnight visitors comes from Northeastern Ontario (40%) and the Golden Horseshoe (24%)².

Issues / Opportunities:

- While Sudbury Tourism marketing efforts have targeted these markets, its focus on the leisure family market, typically parents age 25-54 with 2 children, may be too narrow. According to the TAMs 2007 report, 36% of visitors to Northern Ontario are with partner/no children 17 or under followed by 24.6% with partner/children 17 years and under.
- As indicated in previous reports, the capacity of the host market to contribute to leisure, meetings, conventions and sports activities is underachieving.
- The population of new Canadians and visible minorities, particularly in the untapped Toronto area, are rapidly increasing but Northern Ontario is not attracting them.
- With less dependence on U.S. markets and the anticipated growth of intra-provincial visits (Ontario Ministry of Tourism Ontario forecast 2011), Northeastern and Central Ontario as well as selective Southern Ontario markets are considered “best bets.” These markets also mirror the recommendations of the 2008 Northern Ontario Tourism Strategy.

Planning Imperative:

Moving forward, Sudbury Tourism must allocate its resources and dollars to the markets and target audiences that provide the best return on investment. At the same time, it will need to conduct the research and planning necessary to lever new market opportunities.

² Map of Origins of Overnight Visitors is included in Appendix II

STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 4:

Coordinate Marketing Communications Activities

Action:

1. Set objectives (What is it we reasonably want to achieve as a result of our marketing communications efforts?).
2. Evaluate the strategic roles of a variety of communication channels and integrate these disciplines to provide clarity, consistency and maximum impact.
3. Focus on media that can be measured and track return on investment.
4. Evaluate the broader plans of CTC and OTMPC and other strategic partners and take advantage of cooperative marketing opportunities where they exist.

Situation:

Annual tourism marketing plans have primarily targeted Northeastern, Central and Southern Ontario markets. These plans have utilized a number of communication channels including advertising in selected OTMPC travel publications, producing Visitor Guides for broad distribution as well as customer fulfillment, and participating in consumer trade shows. Annual March break and summer media campaigns are cooperative marketing efforts with Science North.

Issues / Opportunities:

Sudbury Tourism marketing communications plans have lacked clear marketing objectives. Without objectives, results are difficult to measure. Setting objectives from the outset serves a number of functions including:

- Guidance for developing marketing mixes for different target markets
- Information for allocating the marketing budget between target markets
- A basis for objectively evaluating the effectiveness of the marketing mixes
- A framework for integrating the different marketing mixes into the overall marketing plan.

Planning Imperative:

Sudbury Tourism will need to set clear objectives and embrace a more integrated and targeted approach to marketing communications planning – one that coordinates the efforts of advertising, public relations/publicity, personal selling e.g. 1-800, online, trade shows etc., sales promotion, and the internet³. It will also need to integrate its marketing communications activities with the broader Northern Ontario tourism strategy.

³ Integrated Marketing Communications model is in Appendix III



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 5:

Lever the Internet and Emerging Technologies

Action:

1. Develop an internet/online marketing strategy with the appropriate infrastructure, resources and an effective means to “close the sale.”
2. Ensure the strategy has permission based marketing research capabilities.
3. Develop an IT strategy to plan, prioritize and schedule including:
 - Computer technology (Customer Relationship Management tools to track enquiries)
 - Database (names, contacts, lead generation)
 - Internet (email, RSS news feeds)
 - Website (Brochureware, itinerary planning and fulfillment)
 - Bilingual customer service (Call Centres and online support).
4. Integrate internet marketing efforts with the overall marketing strategy to capture the greatest potential benefits.

Situation:

Sudbury Tourism has developed a more robust online presence, from continual improvements to sudburytourism.ca, to a presence on supporting websites such as Facebook, to new plans to address visitor packaging self-service.

Issues /Opportunities:

Website and e-mail marketing have clearly taken a permanent role in tourism and destination marketing strategies and Internet marketing will continue to play an even more important and dynamic role as technology capabilities and user access expands.

Continuous improvements to sudburytourism.ca and a greater presence on supporting websites are required to:

- Enhance and extend market reach
- Support data-capture and data-sharing capabilities
- Support customer service and fulfillment
- Assist planners in decision-making and evaluation.

Planning Imperative:

Sudbury Tourism will need to ensure that the appropriate infrastructure and resources are in place to support an internet/online marketing strategy – one that will generate and maintain traffic to the website, provide trip planning information to potential visitors, tour operators and other travel influences, and establish ongoing relationships with these users to increase visitations.



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 6:

Build and Lever Strategic Marketing Partnerships

Action:

1. Develop new marketing and cross-promotional opportunities with other Northern Ontario DMOs and regional tourism associations.
2. Capitalize on Greater Sudbury's location on the *Georgian Bay Coastal Route*.
3. Create and promote regional and local tours.

Situation:

The *Northern Ontario Tourism: Roadmap for Renewal* marketing strategy proposes a greater alignment of marketing efforts between industry partners, as well as a “cascading” approach that leverages the broader promotional efforts of CTC and OTMPC to promote Ontario.

New organizations and initiatives such as the Georgian Bay Coastal Route and a proposed Northeastern Ontario tour will provide opportunities to build and leverage partnerships to attract new leisure markets.

Issues / Opportunities:

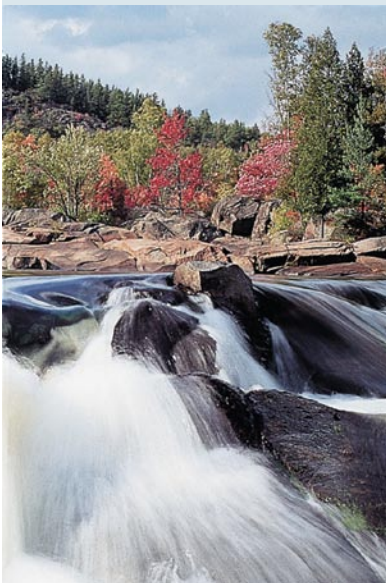
As a major stakeholder in the Northern Ontario tourism industry, Sudbury Tourism needs to:

- Ensure that the broader strategies of the CTC and OMTPC reflect the interests of the local industry
- Take a leadership role in the development of Central and Northern Ontario tour markets.

Planning Imperatives:

Given the scarcity of resources and dollars, Sudbury Tourism will need to work more closely with provincial tourism partners to:

- Improve coordination of efforts between partners
- Facilitate the sharing of knowledge, ideas and research
- Facilitate networking and joint marketing opportunities
- Maximize opportunities for alliances and collaboration.



STRATEGIC MARKETING

Strategic Goal : Develop & Implement Strategic Marketing Programs

Objective 7:

Bundle and Package Products and Services

Action:

1. Explore new packaging opportunities for those target markets and audiences that have an affinity for Greater Sudbury's tourism offerings.
2. Use market research (surveys, database capture and focus groups) to assist in decision-making and evaluation efforts.
3. Promote packages online with self-service itinerary planning and fulfillment capabilities.

Situation:

Without exception, the recommendations of recent planning initiatives have emphasized the need to marry target interests with Greater Sudbury's tourism products.

Attractions such as Science North and Dynamic Earth, the Sudbury Theatre Centre and Timberwolf Golf Course have aligned themselves with accommodation providers to offer tourism packages. Recent efforts including the Cultural Passport program and Sudbury Discoveries, an eco-adventure tourism pilot project, have provided Sudbury Tourism with valuable insights into bundling and packaging the "Outdoors" and "Museums/Heritage" Clusters.

Issues / Opportunities:

- More market research is required to support the development of package programs.
- While recent pilot projects have demonstrated potential, Sudbury Tourism has lacked the resources to effectively coordinate, market and manage them.
- Many of the issues experienced in the past may be offset through internet marketing strategies that permit visitors to plan their itineraries and bundle and package products online.

Planning Imperative:

Itinerary planning and bundling and packaging products that connect prospects to the Greater Sudbury tourism experience will be paramount to increasing visitor length-of-stay and spend.



CLOSING

DS2015 – A Living Strategy

While the *Destination Sudbury: 2015 Strategic Plan* will serve as the focus and future direction for Sudbury Tourism organizational and marketing activities, the plan will continually evolve and change as the organization enhances its capacity to implement the action steps and adapts to the changing dynamics of the tourism industry.

Monitoring Progress

In demonstrating its accountability for the results of the strategic plan, Sudbury Tourism will prepare annual reports for industry stakeholders showing key indicators which will monitor how the strategies are being implemented and the results that are being achieved.

The evaluation process will involve detailed measuring, tracking and analysis of marketing performance and market statistics including:

- Total visitors, total jobs, tax revenue and total expenditure
- Visitor origins, spend and length of stay.
- Industry participation and membership statistics
- Marketing return-on-investment
- Awareness research
- Unique visits to the website
- Tourism inquiries.



APPENDIX I

Sudbury Tourism Partners (2008)

Airport Shuttle	Northern Ontario Railroad Museum & Heritage Centre
Ambassador Hotel	Nuvau Tours
Art Gallery of Sudbury	Old Rock Roastery
Auberge du Village	OLG Slots at Sudbury Downs
Bed & Breakfast Association	Ontario Parks, Northeast Zone
Best Western - Downtown Sudbury	Parker House Inn
Blueberry Festival du bleuët	PEAT (Partners in Eco-Adventure Tourism)
Cambrian College of Applied Arts and Technology	Pine Grove Golf Club
Camp Driftwood	Quality Inn
Cedar Green Golf Club	Radisson Hotel
Centre franco-ontarien de folklore	Rainbow Country Travel Association
Cinéfest Sudbury	Rainbow Routes Association
Comfort Inn - East End	Ramakko's
Comfort Inn - South End	Respect is Burning Supperclub
Days Inn	Ristorante Verdicchio
Dinosaur Valley Mini Golf	Rocky's Lake Wanapitei
Don Cherry's Canadian Eatery	Science North
Dynamic Earth	Simon's Cafe & Deli
Fairfield Inn & Suites	SportLink Sport Council
GDM Group Event Planning/Eventful Times	Stonehill Golf Club
GolfSudbury.com	Sudbury Arts Council
Greater Sudbury Heritage Museums	Sudbury Craft & Arts Foundation
Holiday Inn	Sudbury Gem & Mineral Show
Howard Johnson Plaza Hotel	Sudbury Kartways Inc.
Josephine's Vegetables	Sudbury Multicultural and Folk Arts Association
Killarney Mountain Lodge & Outfitters	Sudbury Region Police Museum
Knight's Inn	Sudbury Theatre Centre
LakeHouse Dining Lounge & Cocktail Bar	Sudbury Trail Plan Association
Le Théâtre du Nouvel-Ontario	Super 8 Motel
Lively Golf and Country Club	Theatre Cambrian
Merit Travel	Timberwolf Golf Club
New Sudbury Centre	Travelodge Hotel
Northern Artist Gallery/Artists on Elgin	Travelway Inn
Northern Lights Festival Boréal	Ukrainian Senior Citizens' Centre/ Garlic Festival
	Uncle Jack's Log Cabins
	Wagonwheel Ranch



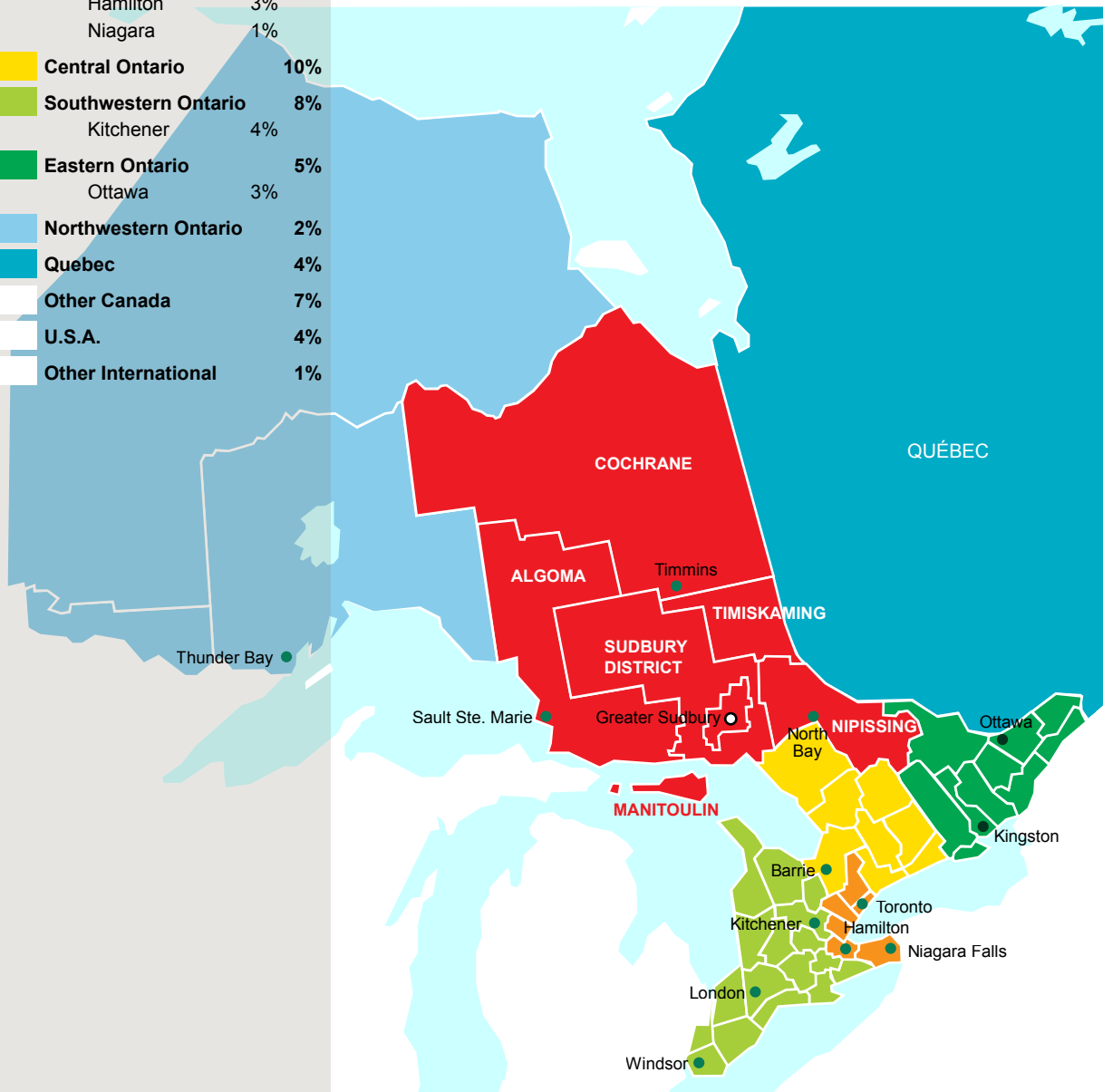
APPENDIX II

Legend

■	Northeastern Ontario	40%
	Algoma	9%
	Nipissing	8%
	Cochrane	7%
	Greater Sudbury	7%
	Manitoulin	4%
	Timiskaming	4%
	Sudbury District	1%
■	Golden Horseshoe	24%
	Toronto CMA	20%
	Hamilton	3%
	Niagara	1%
■	Central Ontario	10%
■	Southwestern Ontario	8%
	Kitchener	4%
■	Eastern Ontario	5%
	Ottawa	3%
■	Northwestern Ontario	2%
■	Quebec	4%
■	Other Canada	7%
■	U.S.A.	4%
■	Other International	1%

Map - Origins of Overnight Visitors

Source: *Tourism Opportunities for the City of Greater Sudbury: A Research Report (2005)*



APPENDIX I I I

Integrated Marketing Communications (IMC) Model

IMC is a concept of marketing communications planning that recognizes the added value of a comprehensive plan that evaluates the strategic roles of a variety of communication disciplines and combines these disciplines to provide clarity, consistency and maximum communications impact.

It is designed to make all aspects of marketing communication such as advertising, sales promotion, public relations, and direct marketing work together as a unified force, rather than permitting each to work in isolation. In practice, the goal of IMC is to create and sustain a single look or message in all elements of a marketing campaign.

one organizing principle, many channels, many expressions

