

Business Plan 2023



visit Buffalo Niagara



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TOURISM MASTER PLAN & STRATEGIC PLAN

In 2021, Visit Buffalo Niagara commissioned a Tourism Master Plan to develop a platform through which destination partners can work seamlessly to strengthen Erie County's destination product and increase overnight visitation over ten years (to the year 2032). Visit Buffalo Niagara engaged MMGY/NEXTFactor to facilitate and lead the yearlong countywide planning effort, culminating with the November 2021 release of the Tourism Master Plan final report and presentation to the Visit Buffalo Niagara board of directors.

For Buffalo and Erie County to realize the Tourism Master Plan's bold vision for the future, the public and private sectors must work together to achieve the four primary goals and strategic initiatives. The goals are aligned around elevating the long-term viability of the visitor economy, developing a competitive positioning for the county as a destination, maintaining the community's authentic character, and improving the overall destination experience for both visitors and residents.

Tourism Master Plan Goals and Initiatives:



The Tourism Master Plan was the guiding document for the MMGY/NEXTFactor's three-year Strategic Plan. Throughout this 2023 Business Plan, department objectives, audiences, and strategies related to the three-year Strategic Plan's four primary goals for implementation with tactics and measurable goals.

Strategic Plan Goals:



The VBN Board of Directors ratified the Tourism Master Plan and Strategic Plan on November 17, 2021.

VBN MISSION, VISION, AND BRANDING STATEMENTS

Mission Statement

Transforming our community by inspiring visitors and locals to discover Buffalo and Erie County.

Vision Statement

To be the most surprising destination you will ever visit.

Brand Positioning Statement

Buffalo Niagara provides authentic and unexpected experiences to inquisitive explorers. The region's revitalized waterfront, restored architecture, thriving arts scene, culinary renaissance, vibrant neighborhoods, outdoor activities, and historic charm make it a not to be missed treasure for visitors and residents.

VISIT BUFFALO NIAGARA COMMITTEES / TASK FORCES

- Executive Committee of the Visit Buffalo Niagara Board of Directors
- Audit and Finance Committee
- Buffalo Niagara Sports Commission – Advisory Council
- Marketing Committee
- Sales and Services Committee
- Destination Development / Industry Relations Committee

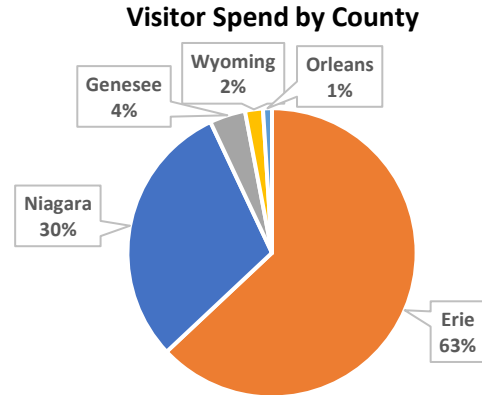
TOURISM TRENDS FOR 2023

Economic Impact of Visitors in New York State in 2021 – Greater Niagara Region

Source: Tourism Economics

In 2021, visitor spending and tourism-related employment grew to \$2.8 billion and 41,931 jobs, respectively. Visitor spending in the Greater Niagara region increased by 75% to reach 98% of 2019 levels.

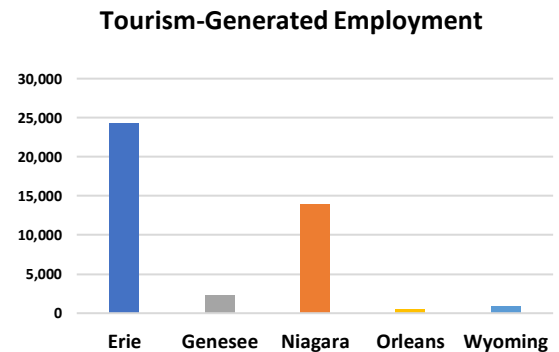
Erie County represents 63% of the region's tourism sales, with \$1.8 billion in direct tourism spending.



Traveler Spending (amounts in millions of nominal dollars)							
	Lodging	Recreation	Food and Beverage	Retail & Service Stations	Transportation	Second Homes	Total
TOTAL	\$470.8	\$474.7	\$1,084.2	\$514.7	\$192.3	\$47.4	\$2,784.2
Erie	\$306.7	\$209.8	\$749.4	\$331.9	\$139.5	\$19.5	\$1,756.9
Genesee	\$16.7	\$15.3	\$46.3	\$15.9	\$9.8	\$2.4	\$106.3
Niagara	\$136.8	\$234.1	\$260.4	\$154.4	\$41.0	\$4.6	\$831.3
Orleans	\$1.6	\$6.0	\$10.6	\$3.9	\$0.6	\$8.3	\$30.9
Wyoming	\$9.1	\$9.5	\$17.6	\$8.7	\$1.4	\$12.6	\$58.9

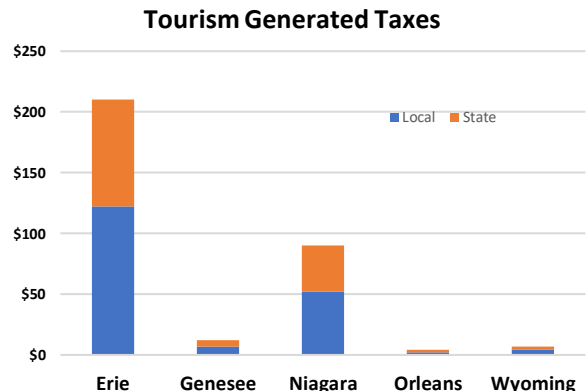
In 2021, total tourism-generated employment registered 41,931 jobs, 7.7% of all jobs within the region. Direct employment in tourism accounted for 53% of all jobs.

Erie County produced the most tourism-related jobs in the Greater Niagara region (24,311 jobs).



Tourism in Greater Niagara generated \$323 million in state and local taxes in 2021. Sales, property, and hotel bed taxes contributed \$187 million in local taxes.

Erie County constituted 64.7% of the region's tourism tax base.





United States Hotel Forecast Key Performance Indicators

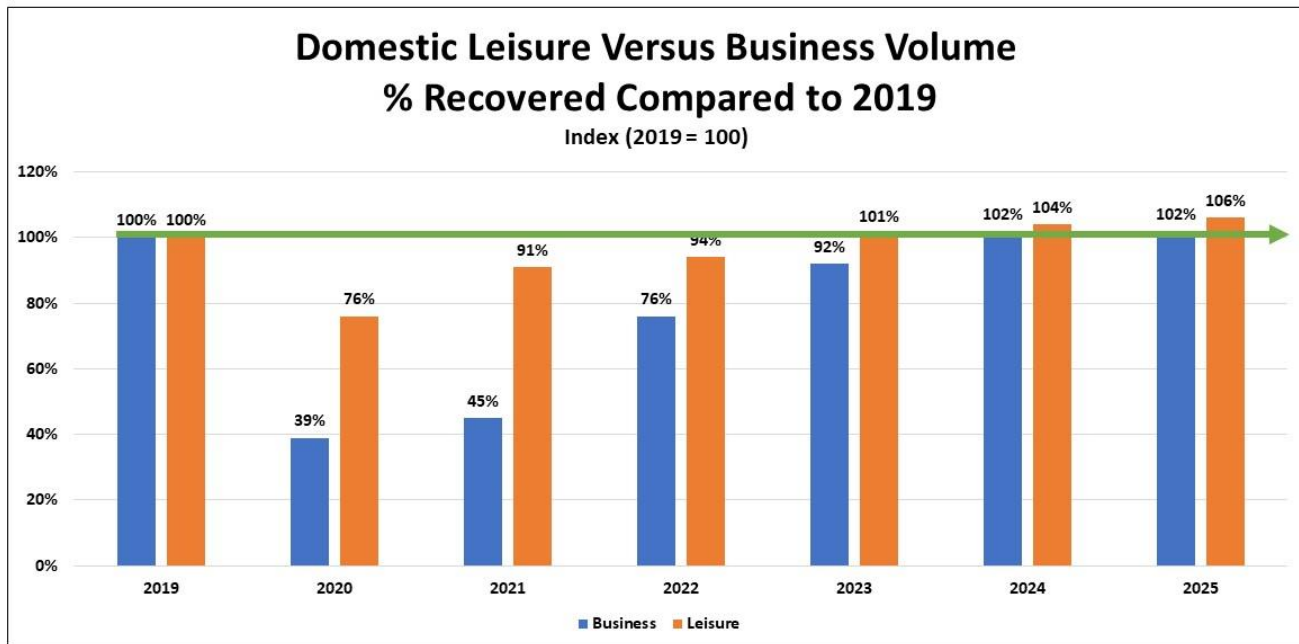
METRIX	2019 Actual	2020 Actual	2021 Actual	2022 Forecast
Occupancy*	66%	41.6%	57.6%	60.1%
Average Daily Rate	\$131.22	\$103.65	\$123.67	\$117.34
Revenue Per Available Room*	\$86.67%	\$42.88	\$71.87	\$70.57



Erie County Comparison Key Performance Indicators

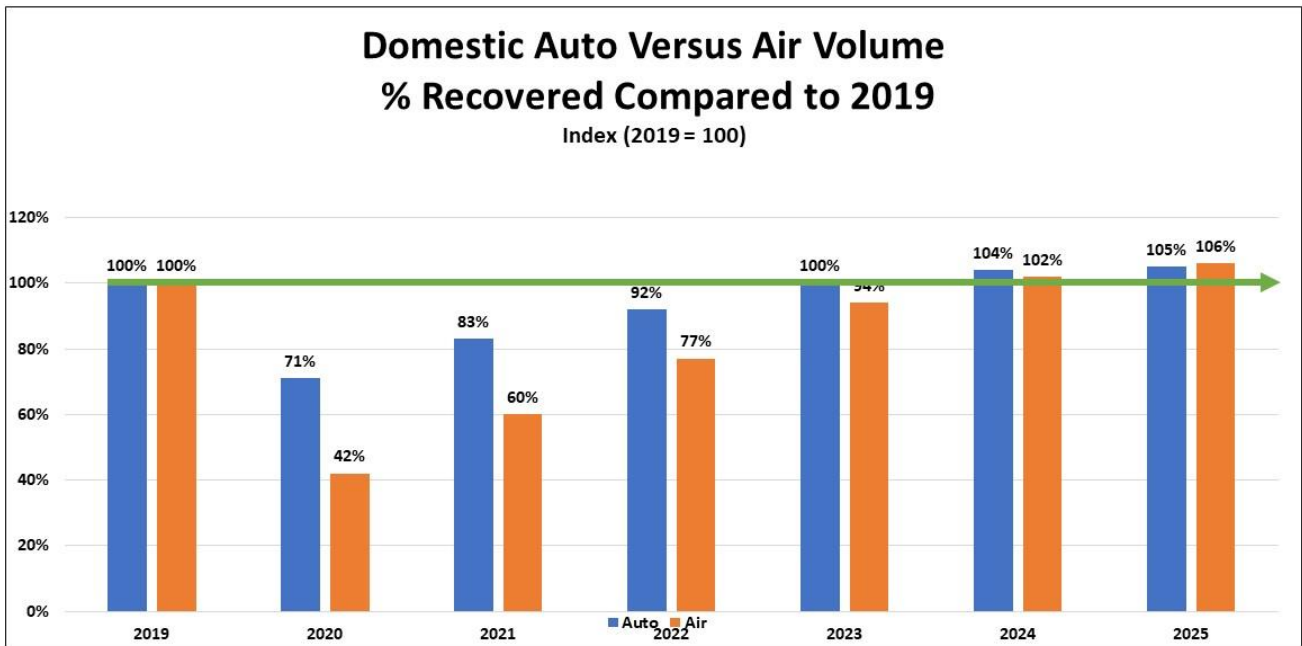
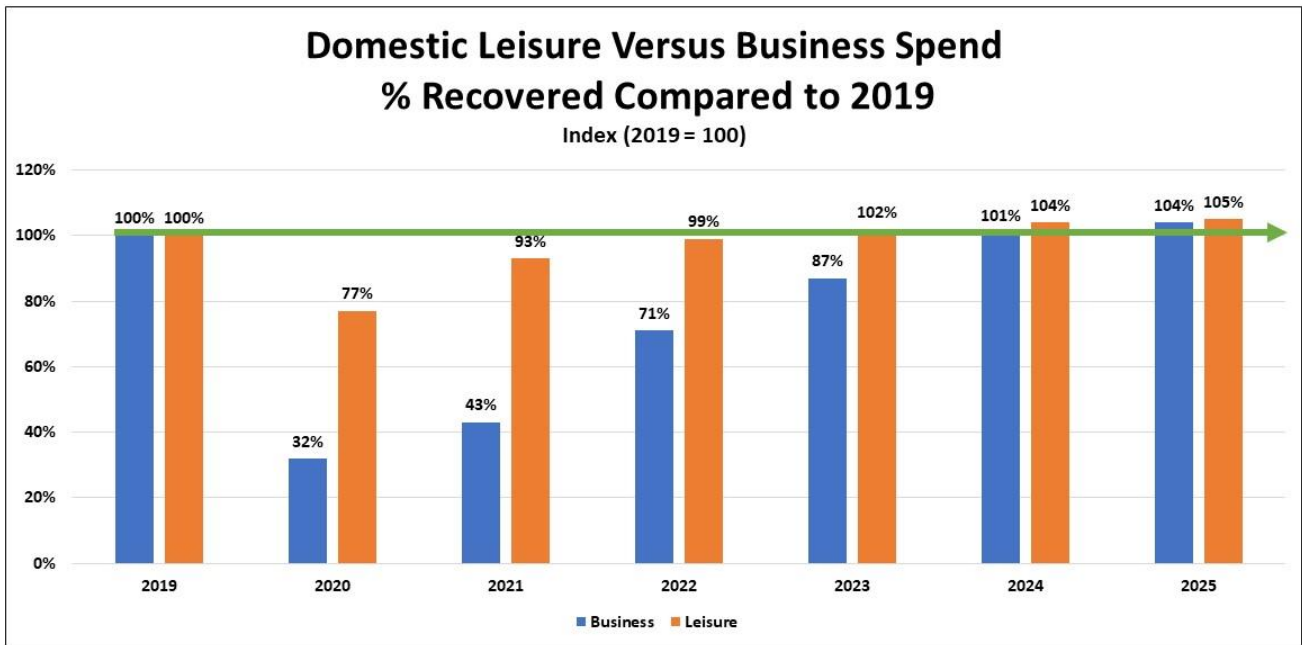
METRIX	2019 Actual	2020 Actual	2021 Actual	2022 Forecast
Occupancy*	61.6%	32.8%	52.1%	Report being produced by STR.
Average Daily Rate	\$106.85	\$87.41	\$107.60	
Revenue Per Available Room*	\$65.84	\$28.67	\$56.10	

* This assumes no temporary hotel closings



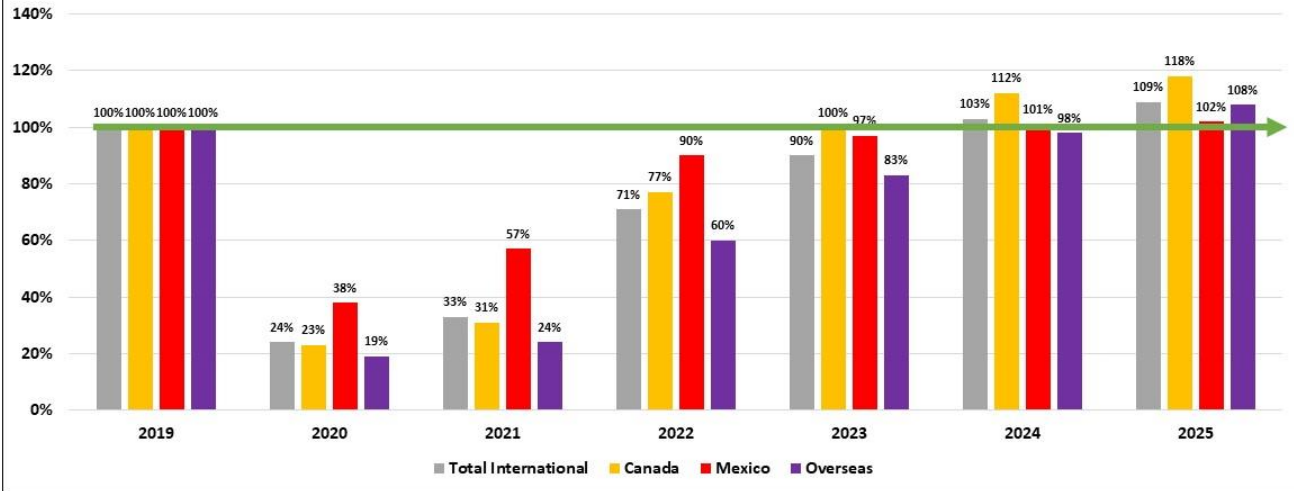
U.S. TRAVEL
ASSOCIATION

TOURISM
ECONOMICS
AN OXFORD ECONOMICS COMPANY



International Inbound Travel % Recovered Compared to 2019

Index (2019 = 100)



VISITOR PROFILE FOR BUFFALO NIAGARA REGION

Longwoods International 2019 Overnight Domestic Visitor to Erie County

- 3.2 million person-trips
- Average daily per person expenditure: \$187
- Average # of nights spent in Buffalo: 2.9
- 63% traveled to Buffalo by car
- 34% planned their trip in one month or less
- 52% stayed in a hotel
- 62% of visitors were between the ages of 25-54
- 70% had a college degree or more
- Top 5 States of Origin: NY, PA, OH, FL, NJ
- Top 5 Activities: Shopping, State Parks, Landmark/Historic Sites, Bars/Nightlife, Museums

Longwoods International 2019 Daytrip Visitor to Erie County (Canada excluded)

- 4.4 million person-trips
- Average per-person expenditure: \$59
- Average length of trip: 4.9 hours
- Top 5 Origin Markets: New York, NY; Rochester, NY; Syracuse, NY; Cleveland, OH; Boston, MA
- Top 5 Activities: Shopping, Casino, Bar/Nightlife, Landmark/Historic Site, Hiking
- 61% of visitors were between the ages of 25-54

(2019 Longwoods Int'l research commissioned by Visit Buffalo Niagara is being updated in 2022 for 2023)

Visitor Profile Study – Madden Media Voyage										
YEAR	Day Trip	Overnight Trip	Average Length of Stay	Average Number of Trips	In-State		Out-of-State		International	
					ALOS	ANOT	ALOS	ANOT	ALOS	ANOT
2022 YTD	29.5%	70.5%	4.3	3.1	4.4	4.3	3.8	1.7	2.6	1.5
2021	34.4%	65.6%	3.9	3.0	4.5	4.5	2.9	1.8	2.5	1.8
2020	29.1%	70.9%	2.0	2.1	1.7	2.7	2.3	1.8	1.7	1.8
2019	24.0%	76.0%	2.2	1.9	1.9	2.7	2.5	1.7	1.6	1.3

Top 10 Visiting States – Madden Media Voyage				
RANK	2022 YTD	2021	2020	2019
1	PA – 14.5%	PA – 13.8%	PA – 13.3%	PA – 11.9%
2	OH – 11.3%	OH – 12.4%	OH – 12.4%	OH – 10.2%
3	FL – 9.0%	FL – 8.1%	FL – 8.4%	FL – 10.0%
4	TX – 5.8%	IL – 5.0%	IL – 5.6%	NJ – 4.9%
5	NJ – 4.5%	TX – 4.7%	MI 4.7%	TX – 4.8%
6	MI – 4.0%	NJ – 4.6%	TX – 4.7%	MA – 4.4%
7	IL – 3.9%	MI – 4.3%	NJ – 4.5%	NC – 4.4%
8	NC – 3.3%	IN – 3.4%	MA – 3.4%	MI – 4.0%
9	VA – 2.9%	NC – 3.4%	IN – 3.3%	IL – 4.0%
10	MA – 2.8%	VA – 3.0%	NC – 3.3%	VA – 3.6%

NEW DEVELOPMENTS FOR FISCAL YEAR 2023

- Buffalo Convention Center façade, interior capital improvements, renaming and launch of new website
- State-level Tourism Improvement District legislation
- Determination of the future Buffalo Bills Stadium
- Continuation of Statler Hotel and Mahoney Building transformation to hotel accommodations
- Launch of Freedom's Footsteps – A Journey Through Buffalo's African American History
- Expansion of the Colored Musicians Club
- Visit Buffalo Niagara destination booth and media marketplace participation at IPW
- Expansion and Relocation of the West Side Bazaar
- Expansion, Re-opening, and Renaming of the Buffalo AKG Museum in 2023
- Room renovation of the Hyatt Regency Buffalo
- April and October 2023 Restaurant Week promotion
- March/April and September/October Theater Month promotion
- Opening of the Silo City residences
- Expansion project at the Buffalo Transportation Pierce Arrow Museum
- Re-opening and new branding of the hotel at the Richardson Olmsted Campus
- Completion of the Broadway Market renovation
- Unveiling of the Central Terminal master plan
- Redevelopment planning for DR&L Terminal
- Further development of OuterHarbor amenities including restrooms, dining options and splashpad
- Further development of Canalside construction projects
- Hosting of Arrowhead and Conference Direct meeting planners
- Construction of the Ralph C. Wilson Centennial Park
- Ongoing implementation of the Albright-Knox Public Art Initiative
- Resumption of work on the Trico adaptive re-use at the BN Medical Campus
- Preparations for 2024 Solar Eclipse
- Preparation for hosting 2025 World Canals Conference to coincide with 250th Anniversary of the Erie Canal

MARKETING DEPARTMENT BUSINESS PLAN

The Marketing Department is responsible for increasing awareness, interest, and desire for travel experiences in Buffalo and Erie County. The team determines the most effective channels and platforms for our messaging by using data-driven insights into the purchase path for potential visitors. Our goal is to reach the right person with the right message at the right moment to deliver maximum visitation to our partners throughout Erie County.

Situation Analysis

This is Our Time: A Once in a Generation Opportunity

Buffalo knows a thing or two about comebacks. Faced with adversity and daunting odds, we have come back repeatedly throughout our history. Recovering from the pandemic is the most recent example of the resiliency and can-do spirit that has become a hallmark of our battle-tested town.

As we continue to emerge from the pandemic, we are determined to build a leisure travel brand on our strengths in architecture, art, culture, cuisine, and outdoor recreation. In addition, continue to promote amateur sports opportunities and meetings and conventions at our revitalized convention center at the direction of the Sales Department. Our goal is to create a multifaceted destination that can compete at the highest level for the attention and commerce of the traveling public.

Buffalo has a once-in-a-generation opportunity to step onto the world stage as a modern metropolis over the next year by highlighting an impressive portfolio of transformative projects coming to fruition after years of strategic investment and shared community labor.

This opportunity coincides with an encouraging rise in consumer sentiment regarding travel in the year ahead. According to Longwoods International, anxiety about gas prices, concerns about inflation, and fear of Covid appear to be subsiding. In a Fall 2022 Travel Sentiment Update, Longwoods reported that 91 percent of American travelers have plans to go somewhere in the next six months, continuing a pattern of high demand, despite lingering pandemic challenges.

The re-opening of the expanded and newly renamed Buffalo AKG Art Museum – home to one of the most significant collections of modern and contemporary art in North America – is a generational opportunity for Buffalo to relaunch its brand, reframe its narrative and re-engage with potential visitors from key feeder markets, particularly consumers of cultural experiences. The debut of the Buffalo AKG represents the culmination of years of investment in new tourism attractions, assets, and infrastructure throughout the region, including the rehabilitation of our waterfront and water resources. As a result, longtime gaps in the Buffalo tourism experience have been filled, and we are now ready to take our place as a premiere destination for cultural tourism, heritage tourism, and outdoor recreation.

Cities and regions worldwide recognize the transformative power of tourism and, like Buffalo and Erie County, are making the hospitality industry a pillar of their economic development strategies. The competition for visitors is fierce. The stakes could not be higher. Prosperous cities of the 21st century attract visitation and inward investment and use the resulting infusion of new money to create jobs and opportunities for their citizens.

"If you build it, they will come" is the romantic, fanciful notion appealing in its simplicity and certainty, but the real world does not work that way. Instead, competing in the global marketplace for the attention of the traveling public requires thoughtful, creative, persistent sales and marketing – a strategic and disciplined approach to winning hearts and minds that only emerges from a deep understanding of our value proposition, our competitive identity, and the narrative that

distinguishes our storytelling in the marketplace. This is the approach Visit Buffalo Niagara intends to use as we enter the inflection point of 2023.

Objective 1 – A Once-in-a-Generation Opportunity

Looking ahead to 2023 and the re-opening of a newly expanded and reimagined Buffalo AKG Art Museum, we know we have a powerful story to tell in the coming year and beyond. In addition to the AKG's collection of the greatest names in modern and contemporary art that hold tremendous appeal to a global audience of cultural consumers, Buffalo has also been actively developing one of the most dynamic public art experiences in North America, with some of the world's greatest muralists creating work that is transforming the streets of Buffalo. While these are the lead stories, Buffalo's vibrant ecosystem of art, architecture, and cultural institutions offers visitors a variety of experiences that will complement and enhance their enjoyment of the AKG. As a result, Buffalo is poised to become a must-see arts destination and a stop on the global art circuit.

Strategy 1: Create an integrated marketing campaign targeting Gen-Xers and Millennials identified by Destination Analysts as our best potential prospects with an affinity for art, architecture, and culture. Target high-potential geographic markets, including New York City and the surrounding Tri-State metro; Toronto and Southern Ontario; Rochester, Syracuse, and New York State outside of NYC.

Strategy 2: Create an integrated marketing campaign targeting high-potential travelers in the 45-65+ cohort with a high propensity to travel for art, architecture, and culture. Target high-potential geographics, including New York City and the Tri-State region; Toronto and Southern Ontario; Rochester, Syracuse, and Eastern New York State.

Strategy 3: Launch a media relations/influencer initiative positioning Buffalo as a must-see stop for lovers of art, architecture, and culture. Employ media newsletters, pitch letters, and attendance at the IMM media marketplace in New York to lay the groundwork for future coverage. Attend TMAC 2023 and SATW Eastern Chapter Meeting. Host desk-side visits/coffee meetings in New York and Toronto in Winter/Spring 2023 to facilitate press trips.

Objective 2 – Boosting the Shoulder Seasons

According to STR, June, July, and August represent the peak of Buffalo and Erie County's hotel occupancy in any given year. With demand often exceeding supply in these summer months, hotel operators naturally look for opportunities to fill rooms with softer demand. The Spring shoulder months of April and May and the Fall shoulder months of September and October have the highest potential to attract off-peak visitation. With that in mind, promotional activities positioning Buffalo as a great springtime and autumn getaway will be launched in the key feeder markets of New York State and Ontario.

Strategy 1: Create a campaign promoting Buffalo as a great short break (36 Hours in Buffalo) destination, targeting high-potential travelers in the 25-44 year-old cohort in our crucial feeder markets who have an affinity for outdoor recreation, culinary experiences, craft beer, and live music.

Strategy 2: Create a campaign promoting Buffalo as a great short break (36 Hours in Buffalo) destination, targeting high-potential travelers in the 45-65+ cohort in our crucial feeder markets with an affinity for performing arts, culinary experiences, and historic sites.

Objective 3: Creating an Outdoor Recreation Destination

By cleaning its waterways and rehabilitating its shoreline, Buffalo and Erie County now contend for the discretionary spending of travelers motivated by the availability of first-tier outdoor experiences. Moreover, improvements to the habitat have been complemented by the development of new recreation infrastructure such as launch ramps, bike paths, parkland, fishing piers, etc. In short, we have gone from industrial desolation to a recreational destination and are now poised to attract a new sector of visitors.

Strategy 1: Create an integrated marketing campaign targeting Gen-Xers and Millennials who view outdoor recreation as a motivator for travel. Target high-potential geographic markets, including Toronto and Southern Ontario; Pittsburgh and western Pennsylvania; Cleveland and northeastern Ohio; Rochester, Syracuse, and New York State outside of NYC.

Objective 4: Orchestrating a Music Tourism Campaign

Thriving music scenes are an amenity that has helped brand cities as vibrant and creative while attracting visitors with innumerable choices for travel. In recent decades, the story of a thriving music scene influencing a city's economy is increasingly common in smaller and mid-size cities. The Music Tourism campaign will bring Buffalo's eclectic and vibrant music scene to the attention of culturally savvy travelers to drive attendance to concerts and performances in the near term, along with a long-term vision of making Buffalo a top-of-mind, best-of-class music destination.

Strategy 1: Create an integrated marketing campaign targeting Gen-Xers and Millennials identified by Destination Analysts as our best potential prospects with an affinity for music, including hip-hop, metal, and Alternative. Target high-potential geographic markets within a three-hour drive radius, including Toronto and Southern Ontario; Erie, PA; Rochester, Syracuse; and Central New York State.

Strategy 2: Create an integrated marketing campaign targeting high-potential travelers in the 45-65+ cohort who have an affinity for music, including jazz, classical, blues, rock, and Americana genres. Target high-potential geographic markets within a three-hour drive radius, including Toronto and Southern Ontario; Erie, PA; Rochester, Syracuse; and Central New York State.

Objective 5: Launching the Freedom's Footsteps Heritage Tourism Initiative

The Freedom's Footsteps initiative will allow visitors to meet the runaway slaves, abolitionists, jazz musicians, war veterans, civil rights protestors, preachers, politicians, and business owners who called Buffalo home. Stories that were once untold have been uncovered in Buffalo – revealing the everyday heroes at the heart of the Black American experience. The Freedom's Footsteps initiative will inspire history buffs and admirers of Black culture to visit Buffalo and hear the extraordinary stories at places like the Colored Musicians Club, the Nash House, and the Michigan Street Baptist Church.

Strategy 1: Create an integrated marketing campaign targeting history lovers and African American heritage buffs in New York City, elsewhere in New York State, and other Northeast metros, including Washington, D.C., Baltimore, Philadelphia, Pittsburgh, and Cleveland.

Objective 6: Promoting Buffalo's Family Fun Experiences

Niagara Falls State Park has been a family destination for generations. Buffalo is now well positioned to capitalize on its proximity to one of the world's wonders with the development of several new family-oriented attractions that should be

a perfect complement to a trip to the Falls. Buffalo's value proposition as a family destination has taken huge strides with the opening of the Explore & More Children's Museum, the Buffalo Heritage Carousel, the Longshed, and RiverWorks, which continues to add family-friendly experiences such as ziplining, rock climbing, and a new Ferris Wheel. In addition, new and improved exhibits at the Buffalo Museum of Science and Buffalo Zoo provide additional reasons for family visitation.

Strategy 1: Create an integrated campaign targeting families with children in Toronto and Southern Ontario; central New York State, Cleveland, and northeastern Ohio; Pittsburgh and western Pennsylvania.

Objective 7 – Leveraging Regional Partnerships

Visit Buffalo Niagara was the lead partner in launching two multi-site regional initiatives in recent years – the Upstate Eats Trail and the Great Wright Road Trip. These products were launched in response to research indicating that road trips would be more popular than ever with consumers who had curtailed traveling due to the pandemic. The Upstate Eats Trails highlights the spectacular diversity of Western and Central New York regional culinary offerings. At the same time, the Great Wright Road Trip puts a new frame around the Frank Lloyd Wright-designed buildings in Western New York and Western Pennsylvania in a way that highlights the entire arc of Wright's career.

Strategy 1: Create an integrated marketing campaign targeting food lovers 25-65+ in New York State, Ontario, Ohio, and Pennsylvania.

Strategy 2: Create an integrated marketing campaign targeting Frank Lloyd Wright fans 45-65+ in New York State, Ontario, Ohio, and Pennsylvania.

Objective 8 – Driving Traffic to the Buffalo Wing Trail

Visit Buffalo Niagara created the Buffalo Wing Trail to better leverage our reputation as the birthplace of Buffalo wings and participate in other destinations' success in creating food trails. The response has been very encouraging since our launch in 2017, with extensive media coverage and increased visitation to the fourteen stops on the Trail. In 2021, VBN began a relationship with Bandwango to assist in creating interest in the Trail using its proprietary technology and strategies in successfully marketing culinary tourism experiences. We plan to continue this relationship and supporting the Trail in 2023.

Strategy 1: Create an integrated marketing campaign targeting food lovers 25-65+ in New York State, Ontario, Ohio, and Pennsylvania.

SALES AND SERVICES DEPARTMENT BUSINESS PLAN

The primary goal of the Visit Buffalo Niagara Sales & Services Department is to promote Buffalo and Erie County as a convention, group tour, and amateur sports competition destination, thus initiating direct economic impact by increasing hotel room night production for area hotel partners and incremental sales for restaurants, cultural attractions, and transportation companies.

Situation Analysis

The pandemic changed how meetings and events are planned, executed, and attended. With a mild recession looming, preparing for the coming years activity has never been more complicated.

Networking and shared experiences have long been valued components of in-person gatherings. With many companies operating remote or hybrid office environments worldwide, the need to bring people together has never been more expected or widely recognized. However, industry leaders advise that business conditions over the next two years may be softer than initially anticipated due to a recession. Potential outcomes could influence travel policies, increase the cost of hosting a meeting, and improve the cost of hybrid panels. In addition, concerns regarding attendee health, mask or no mask, and uncertain air travel due to staffing issues are reasons for proceeding cautiously. Nevertheless, industry leaders are pushing the industry's rebound of reaching pre-pandemic levels to late 2025.

The Hyatt Regency Buffalo, under new ownership and considered the convention hotel due to its connectivity to the Buffalo Niagara Convention Center, will undergo much-needed renovations. The Buffalo Niagara Convention Center will have a refreshed look with a new façade, entranceway, and lobby area to welcome conventioners and event planners in early 2023. In addition, renovations are ongoing for the historic Statler Hotel project; upon completion in late 2024, it will add 183 hotel rooms, 334 apartments, and several hundred parking spaces to the convention and entertainment districts.

The pandemic's effects are still impacting Buffalo and Erie County's hotel inventory. The market has lost over 1,000 hotel rooms; each of these properties was full-service with important meeting & events spaces. These losses will make it challenging to garner large room blocks to host major conventions and sporting events.

To mitigate these obstacles and to plan, Visit Buffalo Niagara has developed a 3-year strategic meetings sales plan with the assistance and guidance of select members of the Customer Advisory Council. The plan identifies selling activities and strategies to achieve a measurable increase in meetings and events in Erie County, a robust integrated digital marketing campaign to raise brand awareness, an upgraded meetings website promoting unique culinary experiences, diverse neighborhoods, unique non-traditional meeting or banquet facilities, target markets that align with Buffalo economic development sectors, and hosting sponsored familiarization events.

The department will continue its focus on securing amateur athletic competitions, often considered recession proof can now also be referred to as pandemic proof, as these tournaments continued at a lesser scale but never really stopped. Amateur sports such as hockey, swimming, softball, and e-sports will remain targets along with new opportunity sports such as pickleball, breakdancing and various LGBTQ+ sports league events.

The travel trade market saw improvement and demand rise in 2022. This is expected to continue in 2023; however, inflation, the value of the US dollar internationally, and rising hotel rates may still affect the market's overall recovery. In addition, the Canadian border recently lifted restrictions (October 22), hopefully resulting in an influx of the Canadian market in 2023.

Domestic adult and student tours within a 500+ mile radius continue to be a target market for multi-day visits. The FIT market is a strong target with continued growth annually and visitors coming from long-haul destinations such as the UK, Germany/Switzerland, and Australia. The Asian market is predicted to re-open; however, with a lack of hotel inventory, the extent of the return tour series locally is still uncertain.

Objective 1- Customer Engagement

Strategy 1: Bring the Visit Buffalo Niagara team to the planner by hosting one-on-one meetings, attending industry events and conferences, and hosting small dinners and special events with the targeted association and event planners.

Strategy 2: Partner with Invest Buffalo and other Economic Development Agencies and work toward a common goal of selling our destination alongside these connectors to assist in identifying local development. Refer to Be in Buffalo campaign and the 250 success stories. Targets include Life Sciences, Food, Dairy, Logistics and Manufacturing, and Advanced Business Services (Tech).

Strategy 3: Collaborate with NYS CVB partners at industry tradeshows such as American Bus Association, Connect Sports, Association and Specialty, PCMA, and IPW, when possible, to increase awareness of NYS meetings, Sports, and Group Tour opportunities.

Strategy 4: Develop Legacy strategies for conventions, meetings, and sporting groups to participate in this initiative should address benefits for both the organization and the community.

Strategy 5: Retain Talley Management Group, an in-market engagement agency located in the DC market, to allow us to have the advantage of an in-market mailing address, phone number, and use of a private conference room for appointments. Use the relationships with partner destinations to cross-sell Buffalo when possible.

Strategy 6: Continue to share destination experiences with the planner through video content and video conferencing technologies in situations when in-person is not feasible.

Strategy 7: Conduct eight smaller-sized familiarization tours, inviting meeting planners from targeted National and State Association sectors that coincide with economic development sectors, tour operators, and sports event planners. Develop and distribute leads to Erie County Hotels.

Strategy 8: Continue to engage with customers through the organization of and participation in the "Buffalo Book Club." Focus literature on Buffalo stories, engage the author when possible, and prepare discussion content to promote the destination for Group Tours, Meetings, and Conventions. "Read the book, Take the Tour."

Strategy 9: Convene the Tenth Annual Customer Advisory Council meeting; use this brain trust to keep a cutting edge on the convention and meetings sales initiatives.

Strategy 10: Convene quarterly Advisory Committee meetings and networking opportunities for the Buffalo Niagara Sports Commission.

Strategy 11: Continue to support a sales representative in the DC marketplace; their proximity allows easy access to industry meetings, bid presentations, and attendance at special events for networking.

Strategy 12: Provide quarterly training sessions for hotel partners to educate inexperienced staff members about the customer experience and the role of Visit Buffalo Niagara.

Objective 2 - Reevaluate and Refine Research and Market Specific Data Analysis

Research and adapt to market shifts and business trends in response to the post-COVID19 industry climate to effectively communicate to clients at every stage of the sales process.

Strategy 1: Utilize data and intel from US Travel Association, Destinations International, Destinations Analyst, and Customer Advisory Council to assess new standards for layouts, contract terms, cleanliness standards, AV and technology changes, site visit protocols, and expectations. Use this information to create relevant sales and marketing messaging.

Strategy 2: Work closely with the Buffalo Niagara Convention Center, competition facilities, attractions, and critical hotel partners to identify and solicit city-wide conventions, sporting events, and group tours that have the potential to come to Buffalo.

Strategy 3: Continue targeted account outreach to the national, state, and local customers solicited previously with marketplace updates. Offer compelling incentives to drive business to 2024 and beyond.

Strategy 4: Review target accounts and markets in addition to the changes of size/attendance and other standards, committing to an ongoing process of identifying emerging trends and recalibrating, as necessary.

Objective 3 - Review and Reinforce Marketing and Communications

Remind and inspire planners that Buffalo is a safe and smart choice for meetings/conventions/group tours, and sporting events.

Strategy 1: Leverage Unexpected Buffalo branding, promoting community assets which include area attractions, great food options, low cost of doing business, and a dedicated hospitality team.

Strategy 2: Promote 360 videos of meeting hotels, area attractions, and sport competition sites to facilitate sales. Videos will be embedded in sales proposals or prospecting when calling on meeting/tour/event planners.

Strategy 3: Utilize a software platform to create customized professional sales presentations and proposals that are uniform in corporate identity, tell the Buffalo story, be engaging, and be interactive for potential buyers in all markets.

Strategy 4: Continue using Vidyard video format when leaving messages for prospects and current customers while exploring other unique technological platforms for engaging customers.

Strategy 5: Become an Events Council Preferred Provider to offer continuing education credit hours to CMPs, during FAM tours, virtual events, etc.

Strategy 6: Build a tour operator "influencers group" that will assist in repositioning and promoting Visit Buffalo Niagara packaging and messaging to their constituents and potential client base to increase bookings by increasing reach and frequency.

Objective 4 – Provide Stellar Event Services

Strategy 1: To maintain a high standard of event servicing and related economic impact, the sales department will share client feedback gained through planner surveys.

Strategy 2: Keep the community, area restaurants, and attractions informed and prepared for the influx of meetings, conventions, and amateur sporting events expected throughout 2023. This initiative will allow them to plan staffing, food prep, and security where necessary.

Strategy 3: Leverage our involvement in the Event Service Professionals Association (ESPA) to provide the most up-to-date convention, meeting, and sports services safely and effectively.

Strategy 4: Use input from our new post-event questionnaire to evaluate services provided to our clients and make recommendations and updates where necessary.

Strategy 5: Coordinate the use of mobile visitor centers at conventions, meetings, and sporting events where appropriate.

INDUSTRY RELATIONS DEPARTMENT BUSINESS PLAN

Situation Analysis

Restoring, rebuilding, and rethinking aptly describe the meaningful work in Industry Relations demonstrated throughout 2022 as we slowly bounced back from the scope of an erratic pandemic. While Visit Buffalo Niagara is central to the tourism efforts of Buffalo and Erie County, for any destination to succeed, the health crisis taught us we needed to do far more than increase visitation.

The department continued down a path through new territory, expanding its non-traditional role in many directions to improve residents' social issues and quality of life and elevate the destination brand beyond as a valuable place to live and visit.

Through reinvention, leveraging resources, and relationship-building, we reimagined projects and developed experiences that align with or enhance a distinct sense of place. The 2023 fiscal year will continue Visit Buffalo Niagara's evolving into a DMMO – Destination Marketing and Management Organization, furthering the inaugural years of Theater Month and Restaurant Week promotions. Following the completion of capital improvement projects at several sights included in the Freedom's Footsteps tourism project, the anticipated launch of visitor activation will take place in 2023.

Objective 1 - Industry Communications

Purposeful communication with multiple audiences is key to all we do. We consistently release a timely, resourceful collection of knowledge and tools to our industry partners. The Tourism Insider, our weekly e-newsletter, publishes bites of thought leadership, municipal tourism updates and reports, how-to's, and new services and product announcements. In 2021, the national average email marketing open rate was 2.3% across all industries. Visit Buffalo Niagara has a 33% click-through rate (CTR) open rate, our engagement performance indicates that users find our information helpful and relevant.

Strategy 1: Increase newsletter engagement and new subscribers by sharing short stories on Visit Buffalo Niagara personnel, products, and services.

Strategy 2: Broaden the e-newsletter reach by creating a marketing campaign to inspire potential ambassadors to subscribe.

Objective 2 – Professional Development

As we see our way forward in rebuilding the visitor economy, we restored some of our industry-wide training and education efforts. Two sessions on the benefits of Google business profiles offered invaluable insight into managing online presence. Visit Buffalo Niagara also hosted a New York State Hospitality & Tourism Association (NYSH&TA) Legislative Networking reception which presented a statewide outlook and leisure and business travel trends in Buffalo and Niagara Falls.

Strategy 1: Continue to support industry partners who are rebuilding staffs post-pandemic. Use customer service as a key strategy for excellent hospitality delivery by encouraging use of existing Visit Buffalo Niagara training programs that impact experience delivery.

Strategy 2: Resume monthly partner extranet training to provide customized, up-to-date information to our website visitors.

Strategy 3: Utilizing the resources of the Buffalo Niagara Convention Center, partner with the Buffalo School of Culinary Arts & Hospitality Management to provide internships and mentoring and expose students to career paths in the tourism industry.

Strategy 4: Reinstate and expand our proactive visitor guide delivery to local hotels and area attractions as well as key Visit Buffalo Niagara partners, as necessary. This will prove to yield an important side benefit of developing face-to-face relationships with frontline staff and management, allowing us to communicate key initiatives and training opportunities.

Objective 3 – Destination Development

Industry Relations has been designing and planning innovative solutions over the past few years, reimagining tourism with new realities in a post-pandemic world. These authentic, unforgettable experiences will celebrate the local landscape and culture, support local businesses, and entice repeat visitation.

Strategy 1: Finalizing the work with the Veneto Collaborative and key Black heritage influencers, Freedom's Footsteps will launch to the public in spring 2023. The project will feature six immersive African American experiences that travel back to explore the stories of revolutionary people.

Strategy 2: Under the leadership of Visit Buffalo Niagara, revive Buffalo Restaurant Week in the spring and fall in collaboration with the local WNY chapter of the New York State Restaurant Association.

Strategy 3: Working with local theaters, hotel partners, and Visit Buffalo Niagara marketing and sales staff, create fall and spring promotions to attract visitors to local theater productions and live performances.

Strategy 4: In partnership with the Buffalo Eclipse Task Force, provide marketing and tourism leadership in planning for the total solar eclipse that will occur on April 8, 2024.

Objective 4 - Reimagine Visitor Services and Engagement Strategy

Provide comprehensive engagement tools and mechanisms to engage visitors and residents to experience the destination as a day trip or overnight and influence extended visitation.

Strategy 1: Launch a staffed visitor information kiosk inside the Buffalo Niagara Convention Center to personally engage with visitors to make recommendations, provide information and extend visitor stay in Erie County.

Strategy 2: Identify strategic opportunities for "Seymour Buffalo," the mobile information center that travels throughout the county during special events and high-traffic areas.

Strategy 3: Continue efforts to convey that downtown Buffalo, is an area that is safe for visitors by continuing relationships with the Buffalo Niagara Convention Center, downtown hotels security teams, as well as the Buffalo Police Department and Buffalo Place Rangers.

Strategy 4: Assess existing and potential new distribution locations of the annual touring guide, focusing on a drive market of 200-300 miles.

Strategy 5: Utilize the volunteer/ambassador program to distribute Visit Buffalo Niagara materials, answer questions and offer guidance at large gatherings and events held in the destination. Offer volunteer training as needed.

Strategy 6: Explore opportunities to recruit new volunteers for visitor engagement opportunities, including significant corporate participation, in anticipation of the return of large-scale events with high visitor and resident attendance.

ADMINISTRATION DEPARTMENT BUSINESS PLAN

The primary goal of the Administration Department is to provide managerial vision, guidance, and necessary resources to all Visit Buffalo Niagara departments related to staffing, management, operational efficiencies, organization Visit Buffalo Niagara to be the leader in hospitality and tourism-based economic development in Erie County.

Situation Analysis

Visit Buffalo Niagara enters the 2023 fiscal year as a reimagined, reorganized, data-driven, socially, and equitably conscious, and highly measurable company. The organization's personnel and financial resources have been strategically aligned to focus within the functional departments of sales, marketing, and industry relations to meet and exceed organization, stakeholder, and resident travel and tourism expectations.

In 2021, the organization engaged with MMGY/NEXTFactor to create a ten-year Tourism Master Plan and a three-year strategic plan. These documents continue to provide the guidance and focus for the future leadership of building back the destination's success in the tourism economy. Leadership continues to utilize and regularly update both plans through staff, community, and stakeholder engagement. Both plans have been shared with government and developers who have expressed an interest in the plans and strategies to further the visitor experience and visitor economy of Buffalo and Erie County.

Visit Buffalo Niagara also continues its responsibility as not only the official destination marketing organization but as the destination marketing and management organization and the reliance on our strategies and research. The organization has earned respect and relevance locally, regionally, and nationally with speaking requests, staff engagement/participation, accolades, and award recognition.

Objective 1 – Research, Industry Reporting, and Measurement Best Practices

Utilizing tourism industry recovery best practices, evaluate and implement revised organization-wide initiative-taking reporting, measurements, and formats of monthly, quarterly, and annual tourism data, establishing a new comprehensive reporting and benchmarking utilizing innovative technologies.

Strategy 1: Continue to enhance the proactive reporting, measurements, and formats of monthly, quarterly, and yearly tourism data through the acquisition of third-party research and economic metrics to better communicate tourism economic impacts to media, industry, and policymakers.

Strategy 2: Directly communicate the measurements of the data dashboards by reporting and benchmarking system for group sales, group booking pace and interactive analytics and reporting regularly to board, tourism industry and stakeholders.

Strategy 3: Host partner meetings with the tourism industry and other interested partners specific to Visit Buffalo Niagara-designated projects, programs, and initiatives noted in the fiscal year 2023 Business Plan.

Strategy 4: Host a Marketing Outlook Forum event highlighting industry research and organizational plans in a day-long professional development event for Erie County stakeholders, government officials, and industry partners.

Objective 2 – Reemphasize Organization Functions and Operations

Provide essential human resource, finance, and overall compliance support services for Visit Buffalo Niagara structurally and within individual organization departments.

Strategy 1: Continue to enhance the proactive reporting, measurements, and formats of monthly and yearly tourism data by acquiring third-party research and economic metrics to better communicate tourism economic impacts to media, industry, and policymakers.

Strategy 2: Foster a hybrid work environment that inspires employees through recognition and open communication.

Strategy 3: Oversee and monitor all accounting functions and controls of the organization to ensure the operational budget is maximized and that timely financial transactions and compliance with fiscal policies and reports are delivered.

Objective 3 – Reinforce the Exploration of Supplemental Funding Sources

Explore funding models, and revenue-generating opportunities used by other destination marketing organizations to supplement existing Visit Buffalo Niagara funding sources and grow the organization's resources.

Strategy 1: Continue working with our elected state and county officials and their staffs, New York State Destination Marketing Organizations, New York State Hospitality, and Travel Association and their lobbying firms, and our hospitality partners regarding the reintroduction of statewide Tourism Recovery Improvement District (TRID) legislation.

Strategy 2: Produce electronic collateral materials, including a microsite related to a local Erie County TRID and develop an outreach plan to engage members of the region's state, county, and local municipal government officials in addition to countywide chambers of commerce, economic development agencies, and lodging partners.

Strategy 3: Reevaluate organizational revenue-generating programs (e.g., advertising, cooperative marketing, industry tradeshow participation, visitor center, etc.) for fiscal year planning.

Objective 4 – Reinforce Overall Organizational Equity, Diversity, and Inclusion

Visit Buffalo Niagara is committed to implementing Equity, Diversity, and Inclusion strategies and best practices. It promises to collaborate with our stakeholders, board of directors, staff, and industry leaders to catalyze change. However, much work must be done, and we must all come together to advance these sometimes difficult but essential conversations to drive solutions.

Strategy 1: Build and sustain an equitable, diverse, and inclusive Visit Buffalo Niagara workforce led by executive leadership and our board of directors.

Strategy 2: Collectively share best practices for growing equity, diversity, and inclusion industry-wide, and hold one another accountable for measuring action and progress.

Strategy 3: Share the experiences of marginalized and underrepresented communities that are disproportionately unseen in Erie County tourism marketing and storytelling.

Strategy 4: Support actions in our community to achieve equity and justice for everyone, including travelers, stakeholders, and residents.

Strategy 5: For Erie County's tourism industry to thrive, it needs to reflect the diversity of the destination, build equity, and promote inclusion. Key to those efforts is for Visit Buffalo Niagara to explore establishing a Tourism Accelerator program to provide resources for businesses owned by people of color, LGBTQ+, women, and veterans to be led by the Visit Buffalo Niagara executive leadership.

Strategy 6: Leadership must remain personally invested and committed to equity, diversity, and inclusion.

Objective 5 – Reimagine and Plan the Destination's and Organization's Present and Future

Implement strategies focused on destination opportunities and community support and engagement through implementing the Tourism Master Plan and Strategic Plan utilizing DestinationNEXT standards.

Strategy 1: Utilize the Visit Buffalo Niagara Ten-Year Tourism Master Plan to guide and prioritize destination experience, organizational function, and relevance.

Strategy 2: Implement Visit Buffalo Niagara Three-Year Strategic Plan through actionable and measurable goals and objectives.

Strategy 3: Maximize the opportunities and resources of Visit Buffalo Niagara's membership within national and state organizations to benefit the organization and our partners. Utilize their resources to gain and share knowledge and industry best practices.

Objective 6 – Renew Stakeholder Relationships and Strategies

Work with state and local economic development allies, regional and community chambers of commerce, and county and city, towns, and villages government officials to ensure that Visit Buffalo Niagara a voice and input on tourism-related projects and plans.

Strategy 1: Increase the perceived value of Visit Buffalo Niagara in the business community and in the county's municipalities, giving us "seats at more tables" and expanding the network of advocates and collaborators.

Strategy 2: Explore the formation of an annual advocacy plan committee, comprised of Visit Buffalo Niagara staff, board members and other leaders external to the organization to identify specific advocacy needs, create an "ask" for those needs and match resources/advocates to those upcoming asks.

Strategy 3: Serve and engage in an initiative-taking partnership and advocacy role with local economic development allies on projects, regulations, and issues with tourism-related implications.

Strategy 4: Utilize the expertise and resources of stakeholder relations for input on implementing the Destination Master Plan and three-year Strategic Plan.

Objective 7 – Refocus the Future of the Buffalo Niagara Convention Center

Continue to advocate for improvements in the immediate and new construction for the long-term for the Buffalo Niagara Convention Center.

Strategy 1: Utilize Visit Buffalo Niagara’s resources, affiliations, and institutional data to advocate and advise for future improvements or new construction of the Buffalo Niagara Convention Center.

Strategy 2: Utilize the organization's strengths of industry/partner's expectations and standards, stakeholder resources, and community outreach and education to assist in forming opinions and strategy.

INDUSTRY MEMBERSHIP AND LEADERSHIP POSITIONS

Patrick Kaler, President & CEO

- US Travel Association, Board of Directors
- US Travel Association, Destination Council, Board of Directors
- US Travel Association, Destination Council, Immediate Past-Chair
- U.S. Travel Association, PAC Board
- Destinations International, Member
- Destinations International, DMAP Board of Directors
- New York Destination Marketing Organization Association, Chair
- New York State Hospitality and Travel Association, Board and Executive Committee
- Buffalo Niagara Partnership, Board of Directors
- Buffalo Civic Auto Ramp, Board of Directors
- Frank Lloyd Wright's Darwin Martin Complex, Board of Directors
- Olmsted Conservancy, Long Range Planning Committee
- Leadership Buffalo, Graduate, and Speaker
- Western New York Sports Advisory Council

James Adler, Sports Marketing Manager

- P.U.N.T. Pediatric Cancer Collaborative, Jr. Board Member
- P.U.N.T. Pediatric Cancer Collaborative, Walk & Roll Event Chair
- COMPETE Sports Diversity, Sports Diversity Leader

Drew Brown, Marketing Manager

- Reddy Bikeshare, Marketing Committee

Emma Carlo, National Sales Manager

- Young Professionals for Olmsted Parks - Member, Class of 2022

Karen Cox, Convention Services Manager

- Event Service Professionals Association, Member

Mike Even, Vice President of Sales and Services

- Destinations International Certified Destination Management Executive
- Buffalo Niagara Sales & Marketing Executives, Board of Directors
- Buffalo Niagara Sales & Marketing Executives, Executive of the Year Committee
- Chippewa Alliance Board of Directors
- Chippewa Alliance Streetscape Design Committee
- Destinations International Sales Advisory Committee
- Meeting Planners International, Member
- New York Destination Marketing Organization Association Sales Committee Coordinator

Karen Fashana, Director of Marketing

- Kevin Guest House, Marketing Committee
- Graycliff, Marketing Committee

Ed Healy, Vice President of Marketing

- Innovation, Creativity & Entrepreneurship Advisory Council at SUNY Buffalo State
- Darwin Martin House Marketing Committee
- Lipsey Architecture Center Buffalo Board of Directors
- The Riverline, Board of Managers

Shannon Jenkins, National Association Sales Director

- Society of Government Meeting Professionals, National Capital Chapter, Member
- Association of Meeting Professionals, Member
- Professional Convention Management Association, Capital Chapter, Member
- Reston Herndon Meeting Planners, Member
- CVBReps, Member
- Meeting Planners International, Member

David Marzo, Chief Financial Officer

- American Institute of Certified Public Accountants, Industry Member
- Certified Global Management Accountants, Industry Member
- NYS Society of Certified Public Accountants, Industry Member
- NYS Golf Association, Member
- Buffalo Green Fund, Treasurer
- Buffalo Academy of the Sacred Heart, Past Treasurer

Leah Mueller, Director of Tourism Sales

- I Love New York, International Marketing Committee
- Ontario Motorcoach Association, Supplier Council
- Ontario Motorcoach, Conference Committee
- UPward Design for Life, Volunteer Committee
- LHS Soccer Booster Association, Volunteer Committee
- American Bus Association, Member
- National Tour Association, Member
- US Travel Association, Member
- Student Youth Travel Association, Member
- Certified Travel Industry Specialist

Heather Nowakowski, Business Intelligence Manager

- Travel and Tourism Research Association, Member
- U.S. Travel Association Research Advisory Committee

Renata Toney, Vice President of Destination Experience

- Assembly House 150, Board of Directors
- East Side Garden Walk, Co-Chair
- Pappy Martin Legacy Society Jazz Collective, Board of Directors
- The Service Collaborative of Western New York, Board of Directors
- Hallwalls Contemporary Arts Center, Board of Directors
- Buffalo Heritage Carousel, Board of Directors
- Bennett-Wells American Legion Post, Women's Committee
- Arden-Newburgh Block Club, Vice President of Communications
- Re-Tree WNY, Volunteer
- Cornell Cooperative Extension WNY CommuniTREE Steward
- Karen Lee Spaulding Oishei Fellow

Lauren Vargo, Sports Services Manager

- Event Service Professionals Association (ESPA), Member

Meaghan Zimmer, National Sales Director

- Empire State Society of Association Executives, Membership Committee
- Meeting Planners International, Member
- MPI Upstate NY, Member
- New York Society of Association Executives, Member
- Destination Marketing Organization in Market Engagement Association, Member