

Experience Wellington Tourism Strategy

Presentation to County of Wellington Council

March 21, 2023



Agenda



Project Methodology



Background



Stakeholder Engagement



Scope of Tourism Services and Delivery Analysis



SOARR Analysis



Strategic Directions and Critical Path

Project Overview

Experience Wellington Tourism Strategy



August 2022

Project
kickoff

Document
Review

Asset
Mapping

September 2022

Workshop
With
Municipal
Advisory
Group

SOARR
Analysis

Spending
Analysis

Economic
Impact
Assessment

November 2022

Stakeholder
engagement
workshops/
interviews

Tourism
Service
Delivery
Review

January 2023

Draft strategy

Feedback
integration
and
finalization

March 2023

Presentation
to Council

Background Findings



Background Key Findings

Wellington Tourism Industry in Numbers



Over 657 tourism assets and supporting businesses were identified in Wellington County.



10,142 workers were part of the tourism industry in Wellington County in 2022.



Estimated visitor spending in Wellington County in 2021 was \$264 million, 44% of the overall total spending in the area



Major draws to the area are local natural assets and restaurants.



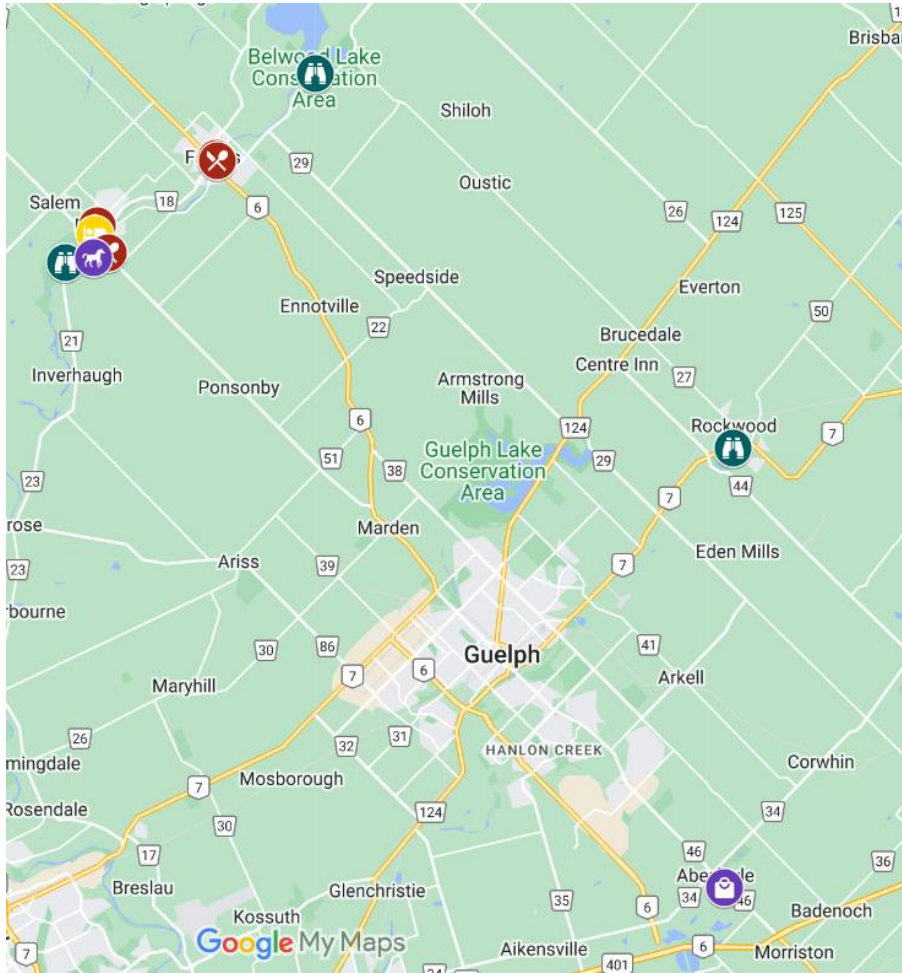
The communities of Guelph, Kitchener-Waterloo, and North Perth represented the highest tourist spending in the County.

Background Key Findings

Major Assets

Top 10 assets attracting visitors into the County
Rockwood Conservation Area
Elora Gorge Conservation Area
Elora Brewing Company
Elora Mill Hotel & Spa
Belwood Lake Conservation Area
Gorge Country Kitchen
Brewhouse on the Grand
Aberfoyle Antique Market
The Goofie Newfie
Grand River Raceway

Major Asset Wellington County – Part 1 (County perspective)



Major Asset Wellington County - Part 2: (Zoom in Elora- Fergus)



Stakeholder Consultation



Stakeholder Interviews

What we heard



More collaboration, coordination and partnerships



Tourism infrastructure is insufficient



Strong, diverse tourism offerings but lack a unique value proposition



Interest in creating a marketing strategy to increase awareness of tourism



Sustainable growth to protect authenticity, heritage, diversity, and the small-town charm



Tourism operators want a space for open dialogue to build connections and network



Develop inventory and clearer understanding of all the tourism businesses in the region

Tourism Service & Delivery Analysis



Tourism Service & Delivery Analysis

An overview of stakeholder initiatives and areas of focus

Local Government and Administrative Services

- No Municipal Accommodation Tax
- Limited Business Licensing
- All operate communications, risk management and emergency preparedness

Tourism-specific Services

- Marketing tactics to attract visitors
- Events/product/experience development
- Familiarization for inbound travel trade
- In-market tourism ambassador program; tracking visitor numbers
- Statistical information and visitor impact studies
- Providing information to visitors
- Signage for visitors
- RTO4 and RTO6 support

Tourism Service & Delivery Analysis

An overview of stakeholder initiatives and areas of focus

Investment Readiness and Attraction

- Investment attraction efforts among most municipalities and County
- County is a member of the Ontario Food Cluster

Business Retention and Expansion

- Ongoing business visits
- Coordinate efforts between business organizations
- Workshops, events and training programs to support local businesses
- Pandemic support to local tourism businesses
- Community Improvement Programs to fund tourism businesses
- Community Futures and Small Business and Innovation Centres

Collaboration

- Collaboration is important
- County is a member of Culinary Tourism Alliance and attends the TIAO Annual Conference

Tourism Service & Delivery Model



Through the analysis of the existing tourism service delivery within Wellington County, **a formalized Destination Marketing Organization model may be premature.**

The recommended first step would be to **establish a Tourism Advisory Committee** which could continue existing efforts to:

- understand tourism assets within the region
- engage tourism stakeholders to meet frequently and collaborate
- determine funding resources to conduct targeted marketing campaigns

The Tourism Advisory Committee could be established by Wellington County Council or function more informally.

SOARR Analysis



SOARR Analysis

Strengths	Opportunities	Aspirations	Risks	Results
<ul style="list-style-type: none"> • Diversity • Character authenticity • County Staff • Preservation of heritage • Brand recognition (Elora, Fergus, Taste Real) • Previous initiatives • Relationship with member municipalities • Substantial assets • Marketing • Events and Festivals • Campgrounds • Forward-thinking stakeholders • Location 	<ul style="list-style-type: none"> • Business development (regional clusters, subgroups, pocket experiences) • Agriculture • Arts and Culture • Keep momentum • Social Media promotion • Wayfinding • Travel cost • Cycling tourism • Visitors' expectations • Sustainability • Accommodation regulations • Internet connectivity • Filming permits and video filming 	<ul style="list-style-type: none"> • Overarching website/portal • One tourism industry voice • Become a food destination • Collaboration • Balanced growth • Longer stays • Increase awareness of entire County 	<ul style="list-style-type: none"> • Over-tourism • Labour force shortage • NIMBYism • Accommodation • Housing • Transition to digital • Small town Culture for businesses • Supporting infrastructure • Mixed housing inventory 	<ul style="list-style-type: none"> • Development of inventory • Increase number of visitors • New tourism products • Infrastructure being built • Increased presence at tourism events • Designation of staff to support promotion • Development of marketing strategy • More events and more experience development • Creation of internal industry event for tourism stakeholders • Increased visitation at events • Increase in overnight visitors and duration • Increased social media reach and website visits

Vision, Mission, Guiding Principles



Vision, Mission, and Guiding Principles

Vision

Wellington County's strategic regional approach elevates and leverages municipal and industry-led tourism initiatives to support economic growth, doubling the value of the tourism economy by 2030.

Mission

The Wellington County Economic Development Division will support growth in the tourism sector by establishing a stronger presence in the tourism space and actively participating in local and pan-regional tourism development opportunities.

Guiding Principles

- **Collaboration**
"Collaborate in destination management"
- **Quality**
"Choose quality over quantity"
- **Resilience**
"Diversify source markets"
- **Sustainability**
"Protect sense of place and reduce tourism's burden"
- **Stewardship**
"Operate business responsibly"

Strategic Directions and Critical Path



Strategic Directions and Objectives



Strengthen tourism industry organization and collaboration

Elevate partnerships in the tourism industry ecosystem

Build bridges to regional tourism success



Build capacity of hosting communities

Fortify tourism infrastructure and supports

Facilitate the viability, resilience, and expertise of tourism operators

Increase tourism product knowledge and awareness



Market and promote the destination

Populate the tourism product catalogue

Update target markets and sales tactics

Develop value propositions and product storytelling

Implement and measure promotional tactics



Strengthen tourism industry organization and collaboration

Actions

Elevate partnerships in the tourism industry ecosystem

**Medium
Term**

- ❖ Collaborate on local tourism industry planning and place-making
- ❖ Leverage each municipality's reputation to promote the County
- ❖ Develop year-round tourism experiences
- ❖ Connect the quality of life of residents with the visitor experience
- ❖ Collaborate with organizations and promote DEI

Build bridges to regional tourism success

**Short to
Medium Term**

- ❖ Share information and resources (e.g., semi-annual meeting/summit)
- ❖ Align County-wide tourism sustainability initiatives with RTO4 efforts
- ❖ Explore opportunities to collaborate with Indigenous tourism operators
- ❖ Improve museum network, promote Wellington County Museum & Archives, support Visitation Experience Plan
- ❖ Leverage the benefits of memberships in provincial, federal and subject-specific alliances



Build capacity of hosting communities

Actions

Enhance tourism infrastructure and supports

- ❖ Develop capabilities in data management and digital strategies to maintain and update information about tourism businesses
- ❖ Create a responsive plan to ensure adequate availability of housing for tourism workers
- ❖ Improve wayfinding to facilitate visitor's access to information and discovery of the region and its businesses
- ❖ Utilize signage to include symbols that educate visitors on rules, services and infrastructure
- ❖ Expand the number, diversity, and accessibility of overnight accommodation options

**Medium
to Long
Term**

Facilitate the viability, resilience, and expertise of tourism operators

- ❖ Deliver authentic experiences
- ❖ Improve understanding of opportunities related to high-value guests
- ❖ Increase joint work between businesses and organizations at a higher level to promote a stronger tourism offer
- ❖ Promote knowledge sharing and encourage operators to follow sustainable practices as part of their operations, the offered experiences and visitor engagement
- ❖ Work to ensure a hospitable environment that ensures newcomers, youth, 2SLGBTQAI+ community, Indigenous peoples, women, seniors and all members of visible minorities feel safe and welcome

Medium Term



Build capacity of hosting communities

Actions

Increase Tourism Product Knowledge and Awareness

- ❖ Develop a portal for tourism operators to communicate the big picture of the sector and what is happening regarding tourism in the County
- ❖ Increase awareness of the County's unique experiences beyond Elora and Fergus through an annual Wellington Tourism Summit and Familiarization Tours for Local Industry
- ❖ Promote year-round tourism
- ❖ Expand and differentiate local gastronomic tourism offerings by leveraging culinary talent, connections, and food and drink
- ❖ Improve the quality, variety and marketing of tourism offerings

**Short to
Medium
Term**



Market and promote the destination

Actions

Populate the tourism product catalogue

Long Term

- ❖ Update and expand the database of tourism products, businesses, entities, and contacts
- ❖ Expand the Taste Real framework and tool to include overnight accommodations that serve local products, ensuring the integrity of the Taste Real brand

Update target markets and sales tactics

Medium Term

- ❖ Enhance target markets for high-value guests
- ❖ Expand sales capability and delivery in key source markets



Market and promote the destination

Actions

Develop value proposition and product storytelling

- ❖ Augment the Wellington County's unique value proposition from a visitor perspective so that it aligns with the community's values (i.e., residents can get behind how the County is being represented in tourism promotion)
- ❖ Create packages for one-day or two-day suggested attractions/businesses and dining experiences
- ❖ Invest in video and digital tools to market Wellington County

**Medium to
Long Term**

Implement and measure promotional tactics

- ❖ Develop printed marketing material that visitors can receive through the County with information of "top ten must do" based on their interests
- ❖ Promote overnight stays in Wellington to build more complete experiences
- ❖ Work with airlines arriving at regional airports to develop overnight visitor packages for off-peak seasons
- ❖ Increase in the County's presence at tourism events (local, municipal and provincial)

**Medium to
Long Term**

Questions?



Deloitte.

**Thank You from the Deloitte
Economic Advisory Team**

Clark Hoskin
Schaun Goodeve
Andrea Marriaga

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