



**Corporation of the County of Wellington**  
**Economic Development Committee**  
**Minutes**

March 21, 2023  
County Administration Centre  
Guthrie Room

Present: Warden Andy Lennox  
Councillor Jeff Duncan (Chair)  
Councillor Diane Ballantyne  
Councillor Doug Breen  
Councillor Matthew Bulmer

Also Present: Councillor Campbell Cork

Staff: Jennifer Adams, County Clerk  
Jana Burns, Director, Economic Development  
Justine Dainard, Smart Cities Project Manager  
Ken DeHart, County Treasurer  
Christina Mann, Manager, Economic Development

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**1. Call to Order**

At 10:00 am, the Chair called the meeting to order.

**2. Declaration of Pecuniary Interest**

There were no declarations of pecuniary interest.

**3. Delegation:**

3.1 Clark Hoskin, Senior Manager, Deloitte Ltd.

1/3/23

**Moved by:** Councillor Ballantyne

**Seconded by:** Warden Lennox

That the Experience Wellington Tourism Strategy Presentation by Clark Hoskin, Senior Manager, Deloitte Ltd. be received for information.

**Carried**

**4. Economic Development Financial Statements as of February 28, 2023**

2/3/23

**Moved by:** Councillor Bulmer

**Seconded by:** Councillor Breen

That the Financial Statements as of February 28, 2023 for Economic Development be approved.

**Carried**

**5. Smart Cities Office – March 2023 Update**

3/3/23

**Moved by:** Councillor Ballantyne

**Seconded by:** Councillor Breen

That the Economic Development Committee receive the Smart Cities Office report for information.

**Carried**

**6. Economic Development Report**

4/3/23

**Moved by:** Councillor Bulmer

**Seconded by:** Councillor Breen

That the Economic Development Committee approve the Economic Development February Report.

**Carried**

**7. Adjournment**

At 11:32 am, the Chair adjourned the meeting until April 25, 2023 or at the call of the Chair.

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Jeff Duncan  
Chair  
Economic Development Committee

# 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.

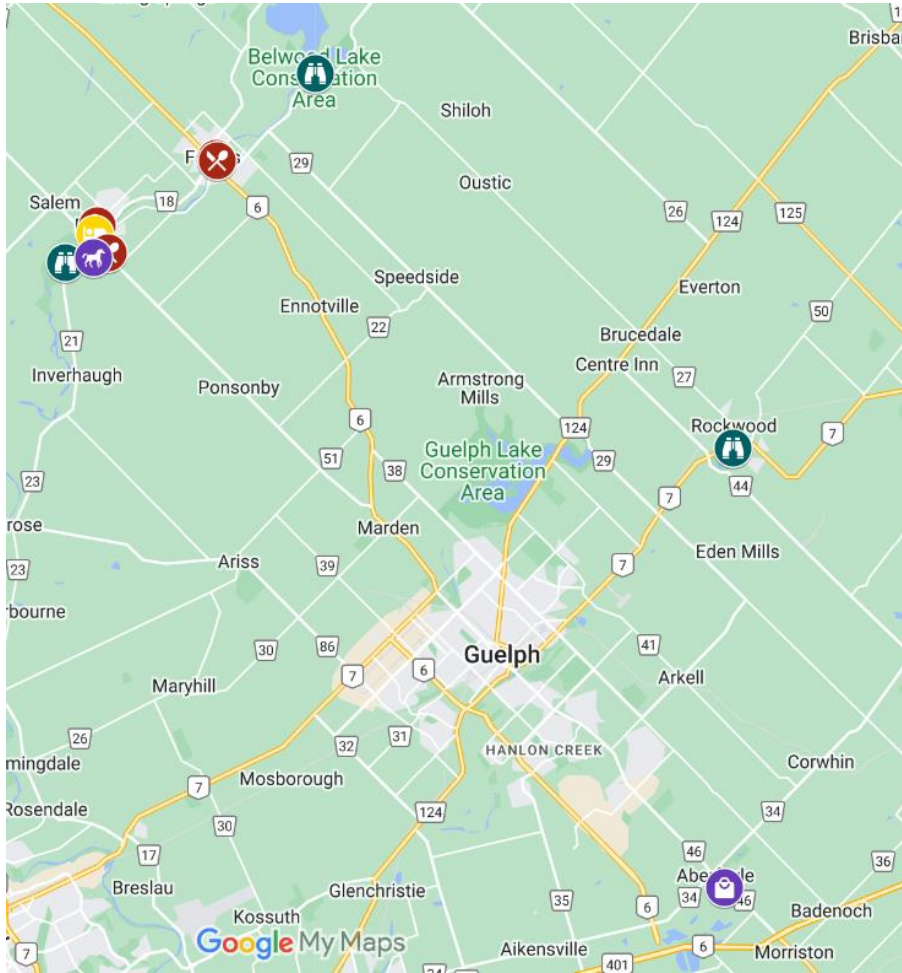


# Background Key Findings

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

# 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

## Disclaimer

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## Experience Wellington Tourism Strategy

January 2023



# Table of Contents

Executive Summary	4
Project Metodology	5
Strategy Backgorund	7
SOARR Assessment	19
Strategic Directions	24
Scope of Tourism Services & Delivery Analysis	27
Strategic Action Plan	32
Conclusion	37

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# Acronyms

Acronym	Description
<b>EDCO</b>	Economic Developers Council of Ontario
<b>RTO</b>	Regional Tourism Organization
<b>TIAC</b>	Tourism Industry Association of Canada
<b>TIAO</b>	Tourism Industry Association of Ontario
<b>DMO</b>	Destination Marketing Organization
<b>WOWC</b>	Western Ontario Wardens Caucus
<b>UNWTO</b>	The United Nations' World Tourism Organization
<b>SOARR</b>	Opportunities, Aspirations, Risks and Results
<b>MAT</b>	Municipal Accommodation Tax
<b>CIP</b>	Community Improvement Plans
<b>WCMA</b>	Wellington County Museum and Archives
<b>HVGs</b>	High-value guests



# 1. Executive Summary

Wellington County's tourism industry is a diverse, creative, growing business sector that has, over the past decade, offered the county's visitors unique and high-quality experiences. Businesses have evolved to demonstrate the sector's strength and potential to become a key driver of economic development.

While the disruption of the pandemic impacted the industry heavily in Wellington County (as it did globally), it is in an advantageous position because of its proximity to large urban areas and visitors' interest in exploring countryside communities. Tourism employment projections estimate stable and continuous growth by 2026, with full-service restaurants and limited-service eating places leading the number of workers.

The industry has significant growth opportunities, with partner communities and business owners willing to engage and collaborate. The Experience Wellington Tourism Strategy is designed to guide how partner communities can more effectively leverage existing tourism assets and how the County's communities can support and enable tourism operators to grow their businesses.

Through the analysis of data, review of existing local strategies, and extensive stakeholder consultation, three strategic directions were developed. The directions are intended to support the industry in its growth and create a more integrated ecosystem that leverages the expertise of tourism stakeholders. The specific objectives and actions recommended in the strategic action plan section of the strategy support the priorities and future industry goals.



## 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

## Key Findings

The following high-level findings emerged from the study:

**A desire for action:** Stakeholder consultation signaled a high interest from businesses and partner organizations to keep momentum on the growth they have seen in the industry. Leveraging current assets and various levels of government resources will help the industry to recover and achieve future success.

**Optimistic future:** Projections for the industry are positive and indicate growth in job opportunities. Stakeholders are confident of upcoming opportunities and want efforts directed into developing marketing resources, promoting more extended stays, and becoming a year-round destination through the different experiences offered throughout the County.

**Challenges:** Insufficient infrastructure, including signage and wayfinding, public toilets, parking, pedestrian crossing lights, represent a challenge for businesses to provide visitors with an exceptional experience. Significant focus was given to the current accommodation capacity limitations as operators feel this is a major barrier preventing longer stays; and it is vital to offer visitors more wholesome opportunities while generating higher revenue for tourism businesses.

### Top Priorities

Tourism operators would like to further collaborate among themselves and with partner organizations to establish channels to support their businesses and the overall industry. There is also a desire by the sector to focus on improving potential visitors' knowledge of the area. Natural assets and restaurants are the main driver of visitors to the County and business operators would like to see enhanced promotional material to reach more groups and appeal to their interests. One or two-day stay packages that combine attractions, accommodation, and dining experiences based on the visitor's interest is one of the preferred strategies.

Industry leaders are interested in growing in a balanced way, one that considers the requirements of its labour force to maintain the County's character and heritage and includes residents in its planning process to continue providing communities where people want to work and live; this is especially important because, in addition to the urban areas, visitors from neighbouring communities and within the County also account for a significant portion of the served population.



## 2. Project Methodology

To develop the Experience Wellington Tourism Strategy, the project team utilized a four-phase approach. In the first phase, the project team met to affirm project outcomes, identify any information gaps, determine stakeholders that would be included in the engagement process and set clear project milestones.

Phase Two focused on understanding of the current situation of the tourism sector in Wellington County. It was important to determine the economic state of the tourism industry, the satisfaction of tourism businesses and operators and who is involved in supporting and promoting tourism within the county. The data revealed that direct and indirect tourism related jobs have begun to recover post-pandemic and this correlates to overall sales volumes of tourism businesses in the County. An analysis of tourism visitor spending demonstrated that the majority of tourists originate from within 100 km of the County and are drawn to natural assets and agri-tourism offerings. Phase two also included a thorough scan of the different governments agencies and not-for-profit organizations that were supporting tourism businesses and engaged in marketing and promoting the region. The latter helped to identify areas of improvement and opportunities to future collaboration.

Phase Three of the project focused on stakeholder consultation and engagement to ensure the strategy and action plan recommendations are tangible, action-oriented and can be implemented across the County. Operators and local industry experts provided a valuable perspective on the current state of the tourism industry in Wellington County. Engagements included one industry workshop, one municipal workshop and interviews with 13 stakeholders. Throughout the conversations it became clear that collaboration will be key to build on past successes and to support the industry in the future.

Building on the earlier phases, Phase Four identified the broader strategic directions and actions that need to be undertaken in order to support collaborative implementation of the identified objectives. The result is a detailed action plan that ensures the County, and its partners are focused on delivering programs and initiatives that support the tourism sector. Three primary strategic directions have been identified with specific objectives detailed within each direction.





Source: TripAdvisor

### 3. Strategy Background

The objective of this section is to provide a comprehensive assessment of the current situation of the tourism industry in Wellington County, the tourism businesses and experiences available in the area, the tourism impact of the industry, and an understanding of the comparative advantages of the community and what the industry hopes to achieve in the future.

## 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.

### 3.1. Background Review & Tourism Sector Trends

Relevant Tourism and Culture work previously undertaken in Wellington County was reviewed to provide background for the Experience Wellington Tourism Strategy. By building on previous work and findings, this tourism strategy will be aligned with ongoing work across the region, will avoid duplication of efforts and will strengthen results.

**Experiential Tourism:** Closed borders and travel restrictions during the COVID-19 pandemic helped people develop a greater interest in exploring their own country, taking the sector through a transformation process across Canada and internationally. Experiential tourists want to follow the path less travelled; they have a greater appreciation for food and drink that reflect the region's local cuisine, heritage and traditions. Offering authentic connections with people and local culture in meaningful ways is vital.

**Digital Marketing:** The way communities communicate with their visitors has also changed, with higher industry interest in promoting shoulder seasons and offering new experiences. Communities often pursue data-driven analysis to identify their target markets for future planning and marketing campaigns. Offering flexible tools is crucial in a highly competitive tourism market.

**Current Strategic Priorities and Implementation Planning:** Communities throughout the County have identified arts and culture as a strategic area of growth. Ecotourism, Nature Tourism with activities such as birdwatching, outdoor activities such as fishing, and hiking, food/wine/beer festivals, and farm-to-table experiences are also opportunities that provide unique and visitor-centric experiences. Efforts have been directed at identifying the cultural assets, major origin communities and local desire to strengthen connections throughout and beyond.

The County has created successful programs to build from, including the County's Taste Real Food Tourism Strategy and The Food Experience Guide, both of which focused on positioning the region as a food tourism destination while interconnecting local culinary assets with art and heritage experiences, reflecting that the

region's offering goes beyond restaurants and includes farm-to-table experiences. Other initiatives include the Wellington County: Cycle Tourism Destination Assessment and Recommendations which aim to grow Wellington County as a cycle-tourism destination.

Aligned with these initiatives, the County of Wellington's 3-year Economic Development Action Plan identifies the following strategic priorities:

- Support the local tourism sector.
- Facilitate tourism product development.
- Promote Wellington County experiences.

**Impacts of COVID-19 and Tourism Sector Recovery Efforts:** Starting in 2020, federal and provincial governments directed funds through the Tourism Recovery Program, which ended in 2022, and the Tourism Relief Fund, active until March 2023, to assist for and non-profit tourism businesses in protecting vital jobs in communities and preparing to reopen and safely welcome back visitors. In addition, the Destination Canada 2021 Resident Sentiment Towards Visitors Survey Report reflected that 85% of Ontarians feel safe travelling to nearby communities, while 79% feel safe travelling to farther communities in the province. Only 33% felt safe travelling to the U.S. This situation represents an opportunity for Wellington due to its location near big cities.

## 3.2. Economic Impact Assessment

Assessing the contributions of the Wellington County tourism industry helps to determine this sector's current and potential role in the regional economy. To describe these contributions, the following section utilizes data extracted from Lightcast.

- **Employment:** For 2022, the tourism sector supported 10,142 jobs and is expected to reach 10,556 by 2026. While these numbers reflect an improvement from 2021, it is still not at pre-covid levels, and its recovery is expected to be slow but steady. The sub-sector in the tourism industry with the highest job creation in Wellington County is restaurants, with 5,804 supported jobs in 2022, which reflects alignment with efforts to position the County with unique experiences in this sub-sector.
- **Sales:** The sales of an industry indicate the total production in that sector and are used as an indicator for current and projected growth. Industry sales were \$775,734,398 in 2019, with restaurants leading at \$467,279,442.
- **Supply Chain:** Within the tourism industry, in Q1 2022, meat products manufacturing and dairy products manufacturing account for the industry supply with the highest total purchases, with a total of \$37,608,987 and \$18,674,878, respectively; of these, 100% and 99.6% are purchased inside Wellington County. This means tourism operators who require these products are able to find it and choose to buy it in Wellington County and reflects that the County has the capacity to support the industry while retaining industry purchases in-region. Other subindustries ranked in the top ten of total purchases, all of their purchases made -within the region, include beverage manufacturing and farms.
- **Staffing Patterns:** Most occupations employed in the tourism industry are food counter attendants, kitchen helpers, and related support occupations, representing 19% of the total jobs in the sector in 2021, followed by food and beverage servers, representing 8.3%.

- **Multipliers:** Tourism has the potential to generate income and employment both directly and indirectly. The sales multiplier determines how far one dollar of sales recirculates through other sectors within the economy. The employment multiplier measures how the variation of jobs within the tourism industry translates into employment changes in the broader regional economy. The wage growth multiplier determines how a dollar in wages earned multiplies through the entire economy.

In the County, the largest wage multipliers are from gambling industries (1.98), followed by rooming and boarding houses (1.56) and drinking places (1.50). While the gambling industry does not employ the largest portion of the tourism sector, its impacts are attributed largely to indirect tourism, as individuals who come from afar to participate in gambling activities also spend money on food, services, and accommodations. Gambling industries also produce the highest employer multiplier (2.17) and sales multiplier (1.96) followed by drinking places (1.87), and specialty food services (1.68).

### 3.3 Visitor Spending Analysis and Heat Map

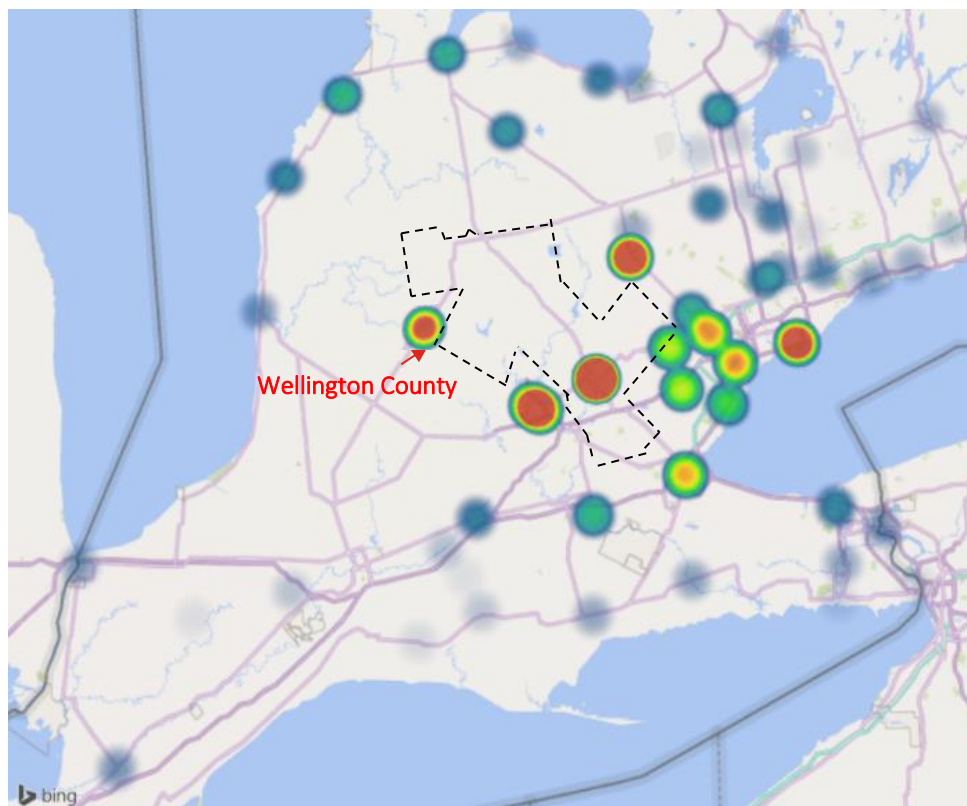
To further comprehend the tourism spending in the area, local spending, the contribution of each subsector into the tourism economy and the visitor's main origin communities, the analysis uses spending data sourced from selected point-of-sale transactions processed by Moneris Data Solutions in 2021, involving credit and debit cardholders living in Canada.

- Total estimated spending in Wellington County in 2021 was \$600 million of these, 44% (\$264 million) was estimated to be visitor spending. Camping, Hotel, Recreation and Entertainment, Car rental, Taxi, and Limousine<sup>1</sup> was the top service for visitor spending (72%) followed by Clothing, Footwear, Hobby, Novelty, Souvenir, and Toy Shops (53%) and Restaurants and Drinking Places (47%).

- The majority of the expenditure (\$228 million or 38%) was on fuel, followed by hardware and furnishing stores (\$110 million or 18%), and restaurants and drinking places (\$76 million or 13%).

- Visitors coming from Guelph account for the majority of the spending in the area for a total of \$52 million or 20% of the total, reflecting the

**Figure 1: Spending by Origin in Wellington County 2021, Major Origin Communities**



Source: Deloitte Analysis of Moneris Data

<sup>1</sup> Moneris frequently groups two or more Merchant category codes (MCCs) to retain privacy of the businesses that belong to these categories.



proximity and close relationship with the county. Kitchener-Waterloo follows, accounting for \$45 million or 17% of the estimated spending. North Perth was third with \$21 million or 8%.

- Other communities with residents who spend a lot in Wellington County are Orangeville (20 million or 8%) Toronto (\$17 million or 6%) and Mississauga (\$9 million or 4%).
- Visitors from Toronto account for the majority of those who require a longer drive, with its higher contribution in Other General (not categorized elsewhere), accounting for 20% as the top community and the second largest for camping, hotel, recreation and entertainment, car rental, taxi, and limousine with 10%. Toronto is also in the top three rankings for restaurant and drinking places in Wellington County with 8% of visitor spending.
- Other communities like Brampton, Mississauga, and Hamilton, have a higher representation in the sub-sectors of groceries and alcohol, hardware and furnishing, and other general (not categorized elsewhere).
- The number of visitors that made purchases in Wellington County reached its highest peak in August with 419,900.
- Visitors had shorter stays during the summer and fall months, reaching the lowest point in August with two nights on average.
- Visitors to Wellington County spent an average amount of \$74.75 per visit. The highest average of spending was reported in November with a total of \$89.98 per visit.

### 3.4 Visitor Perception Analysis

Businesses and communities wanting a tourism focus need to align their marketing strategies with the way that visitors search for experiences and products. Tourists have shifted almost entirely to the online marketplace and so businesses and those engaged in marketing destinations must capture the attention of tourists online to attract them.

Supporting businesses to have a presence in strategic platforms represents an immense opportunity to communicate the broader offer in the County, become accessible and establish relationships with future tourists.

Capturing the attention of visitors by promoting experiences, accommodations, or “instagramable” opportunities starts with their pre-trip research. In this stage, knowledge and perceptions of other users helps to shape decisions and explore added experiences referenced by others.

The visitor perception analysis is derived from Google and TripAdvisor ratings and rankings, with analysis by Deloitte. It reflects the aggregated visitor satisfaction levels and identifies those attractions, accommodations and restaurants that are positioning themselves effectively and therefore supporting the perceived strength of local tourism offerings.

For the analysis, the communities of Elora, Fergus, Erin, Guelph/Eramosa, Puslinch, as well as Harriston, Clifford and Palmerston (which were combined) were selected. Within each community or cluster, the businesses with higher Google and TripAdvisor reviews were used in the analysis as these allow insight of a wider range of visitors.

Overall, visitors reflect they are highly satisfied. With only two exceptions, all analyzed businesses have rankings above 4.0. Most of the businesses also have an online presence in at least one of the platforms, however, there is opportunity to improve the overall number of reviews, specifically in TripAdvisor. The full list of analyzed businesses is included in the appendix.



- **Harriston, Clifford and Palmerston:** Visitors to this area are satisfied with their local experience. Assets with higher recognition are part of the food and drink sector, which is consistent with the promotion of the area as a food destination in Wellington County's Food Experience Guide. There is an opportunity to focus efforts into increasing traffic in TripAdvisor to improve the number of reviews.
- **Elora:** Visitors are satisfied. Among the top 10 ranked businesses in Elora, five are also part of the top 10 drivers of visitors into the County. The community enjoys exposure of its tourism assets on both Google and TripAdvisor, and these reflect a variety of destinations for different interests, including natural assets, food and drink, accommodation and entertainment.
- **Fergus:** Visitors to Fergus are also satisfied. This community, along with Elora, has the highest number of reviews in both platforms. The top 10 tourism assets in Fergus with a high online profile include natural assets, food and drink, entertainment, cultural heritage institutions and accommodation.
- **Erin:** Satisfaction levels from visitors to Erin are strong. Most of the businesses with a higher online presence belong to the food and drink sector. The offer is complemented with other assets including entertainment, accommodation and agriculture. Businesses in this community have a strong presence in Google but there is an opportunity to improve the overall number of reviews on TripAdvisor.
- **Guelph/Eramosa:** This community has the Rockwood Conservation Area, the asset that is currently attracting the most visitors to the region. Rockwood also includes the Harris Woolen Mill Ruins which, alone, has a 4.4 ranking over 386 Google reviews (it is not included in the table to avoid double counting). Visitors report good satisfaction levels, with opportunity to increase exposure on TripAdvisor, especially for Thatcher Farms, Hangout and Rockwood Farmers' Market.
- **Puslinch:** Overall, visitors report to be satisfied in Puslinch. Some of the top ranked assets in the community are mapped by the Google and TripAdvisor platforms in neighbouring communities such as Cambridge and Guelph, including the Aberfoyle Mill Restaurant mapped in Guelph on Google. .

Consideration should be given to the fact that some rural businesses located in Guelph/Eramosa or Puslinch can be located in Guelph or Cambridge depending on their postal code. However, ensuring these assets are captured as part of the County Tourism offer is critical and should be a primary focus for these businesses and the County.

### 3.5 Tourism Asset Mapping

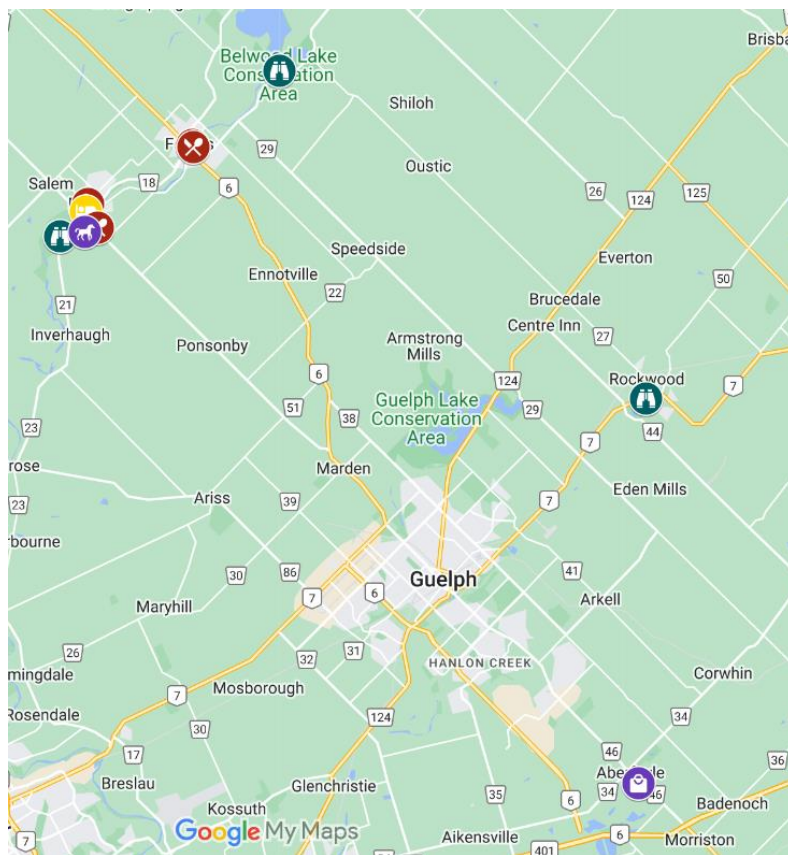
The development of the Experience Wellington Tourism Strategy includes the identification and mapping of the County's tourism ecosystem. To better gauge local tourism development potential, a business count of Wellington County's tourism businesses and an analysis of the major assets was conducted; the full list can be found in the appendix.

To conduct the asset mapping for Wellington County, a range of attributes were considered including Google and TripAdvisor reviews and ratings.

Online visibility and potential for future tourism development were also considered as these give us insight from the businesses currently attracting most visitors and those with the potential to do so. The County's local tourism assets were divided into categories:

- **Major Asset:** A significant driver of yearly visitors from outside Wellington County.
- **Emerging Asset:** A moderate driver of yearly visitors from outside the County with potential to grow.
- **Supporting Asset:** An asset that does not draw new visitors into the region but is still important (e.g. retail stores and restaurants).
- Tourists are drawn to the area foremost by local natural assets and restaurants, accounting for three and four of the top 10 assets respectively. The Elora Mill Hotel and Spa is the primary accommodation asset attracting visitors to the County.
- The top 10 assets attracting visitors into the County are:
  1. Rockwood Conservation Area
  2. Elora Gorge Conservation Area
  3. Elora Brewing Company
  4. Elora Mill Hotel & Spa
  5. Belwood Lake Conservation Area
  6. Gorge Country Kitchen
  7. Brewhouse on the Grand
  8. Aberfoyle Antique Market
  9. The Goofie Newfie
  10. Grand River Raceway

**Figure 2: Major Asset Wellington County – Part 1 (County perspective)**



- Over 30 emerging tourism assets are identified in Wellington County, most of which possess a satisfactory online presence with opportunity to improve. The ranking is based on formulas that analyze ratings and reviews from the two online platforms, with extra weight given to listings with both higher rankings and more reviews.
- More than 600 tourism assets and supporting businesses were identified in Wellington County, most of the businesses were tourism retail businesses (326), followed by Drinks and Restaurants businesses (158).

**Figure 3: Major Asset Wellington County - Part 2:  
(Zoom in Elora- Fergus)**



### 3.6 Stakeholder Consultation Summary

The consultation phase with regional tourism stakeholders ensures the strategy and action plan recommendations align with the community's vision, are tangible, action-oriented and can be implemented across the County. Operators and local industry experts provided valuable perspective on the current state of the tourism industry in Wellington County. The engagement process included one industry workshop, one municipal workshop and interviews with 13 stakeholders.

The following common themes were identified:

- **Tourism businesses inventory:** One of the most pressing interests from stakeholders is to have an inventory of all the tourism businesses in the region to gain a clearer understanding of the tourism offer, for both internal use and for visitors. There is great emphasis on improving digital communication through a website or map application that promotes the community and categorizes businesses and events by interest (nature, arts, adventure, farm-to-table experiences and more).
- **Collaboration, coordination, and partnerships:** The majority of stakeholders expressed an interest in having more collaboration between tourism organizations and businesses through the county and with neighbouring communities.
  - **Organizations:** Recognizing Guelph as an important neighbour, stakeholders would like to see efforts directed to strengthening partnerships with organizations such as Invest in Guelph and the workforce development board. Stakeholders also want to increase connections and expand the collaboration and coordination with RTO4 beyond Elora, Fergus, and Guelph.
  - **Businesses:** More cooperation among tourism businesses is also of high interest. Operators would like to get together with businesses of the same nature with the objective of sharing resources, knowledge and expanding their network. Furthermore, initiatives that connect different experiences through the creation of packages are also being explored to offer visitors a more wholesome experience in the County, providing a “one day” or “two-days” experience where businesses promote each other and complement their offer combining adventure, accommodation, and dining. This program could require supporting transportation.
- **Supporting infrastructure:** As tourism continues to grow, stakeholders have identified that infrastructure to serve visitors is lacking. The County needs:
  - **Signage and wayfinding:** Stakeholders reported that while increasing digital presence is a priority, to make the information more flexible and accessible, in-market elements such as printed material, driving maps, trail maps, information centres and directional signage are crucial to provide a unique experience, where visitors don't have to rely on their phones and the County can influence a visitor's decisions. Maintaining the human factor was also highlighted, and there is interest in developing guides similar to the Taste Real that have a “top 10” attractions to visit.
  - **Public toilets:** Visitors constantly turn to restaurants and organizations like the Centre of Arts to access washrooms. However, when not available, many visitors use alleys, which affects the hygiene of the towns.

“We need to work more with partner organizations and the community, so they understand the positive impacts of tourism.”

- Input from Stakeholders Interview

- **Parking:** There is currently insufficient parking in the Elora and Fergus downtown, causing competition between visitors and residents for available spaces. Strategies including shuttles from Casino to Town are being implemented to mitigate this.
  - **Cycling infrastructure:** Wellington's visibility as a cycling destination is increasing. Additional trails, lock stations and trail signage are needed to support this group of visitors.
  - **Walkability:** Improved sidewalks and pedestrian crossing lights are needed to allow visitors to explore easily and safely, reducing the need of parking in the downtown.
  - **Connectivity:** Stakeholders would like to see further investment in broadband and wi-fi to enable visitors to stay connected to the internet.
  - **Accommodation:** Given the interest in promoting longer stays, one of the biggest identified challenges was the lack of overnight accommodation.
  - **Trails:** The Grand River Conservation authority was identified as a strategic partner to build a more robust trail system and amenities.
- **Diversity:** The County has the advantage of offering a wide variety of activities that appeal to different age groups and interests, including agri-food and culinary tourism, adventure tourism, natural beauty, events, cycling, heritage and more. However, this could also represent a challenge when developing and communicating a unique value proposition. Strategies to address this include destination development in villages and sub-clusters, designating areas to build out offerings and amenities per community.
  - **Marketing:** Stakeholders expressed high interest in having a marketing strategy led by the County to promote a regional brand and increase awareness of the tourism offer in the area; tourism industry operators have the opportunity to capitalize on Elora's reputation and expand the promotion to a regional level. Stakeholders identified that current marketing material has a big focus on natural assets that already draw visitors to the area and have recognition, such as the Elora Gorge. It would be beneficial to emphasize businesses or attractions that appeal to another demographic.
  - **Balanced growth:** When sharing their vision of the tourism industry, stakeholders expressed interest in maintaining authenticity, protecting heritage, diversity, and small-town charm. Stakeholders identified the need to collaborate with residents and include them in tourism planning processes to avoiding struggles with visitors, maintain quality of life and offer a better visitor experience as a community, where visitors understand great offerings within the county and decide to come back.
  - **Support from tourism partners:** Tourism operators would like to see partner organizations leading the creation of a space for open dialogue, where businesses can collaborate, build connections between them and with the County, and improve their awareness of programs and the tourism network. They would also like to receive funding support through grants, loans, or a dedicated person to help them with grant applications. Tourism partners could also provide guidance to smaller organizations on available resources and programs as well as educate residents on the benefits of tourism.



### 3.7 Target Market Profiles

The objective of identifying target markets is to support promotion that communicates to potential visitors that Wellington County has the experiences they are looking. Based on the findings from the previous phases and with a clear understanding of visitor spending, visitor origins communities, tourism operator aspirations and major assets that are driving visitors into the County, the following markets will be the backbone for future marketing activities and effective use of time and money.



**Kick-Back Country:** The wealthiest rural lifestyle, Kick-Back Country consists of middle-aged families and older couples living in rustic areas near large and medium-size cities. People in this group tend to be between 45 and 64 years old, with children between the ages of 10 to 24. Despite mixed educations, they earn impressive incomes from jobs in mining, construction, trades and transportation. Almost 90 percent of households own a home, typically a spacious, single-detached house. Beyond the urban sprawl, driveways often contain compact SUVs and large pickups for commuting to work, hauling boats and campers, and travelling to the city for shopping. They aren't too remote for big-city nightlife, but they also like staying home to watch TV sports and listen to country music radio stations.



**Family Mode:** Comprising more than a million people, Family Mode is one of the largest segments in Canada—and growing. Home to large, suburban families living in recently built houses, this lifestyle is rooted in midsize cities surrounding large metro areas. Its neighborhoods are filled with adults between 35 and 54, and children over the age of 5. These middle-aged adults have used their mostly high school and college educations to land a variety of blue-collar jobs. Their upper-middle incomes allow them to purchase single-detached houses and fill their garages with skiing, golfing and hockey equipment plus motorcycles, boats and camping trailers. A vacation means packing up the camper and hitting the road for one of Canada's parks.



**Savvy Seniors:** An aging lifestyle, Savvy Seniors is home to older singles, couples and divorced or widowed individuals found mostly in cities throughout Ontario, British Columbia and Alberta. Many are financially comfortable, enjoying middle-incomes and owning easy-to-maintain singles, rows, apartments and condos. With nearly 40 percent of the group over 65 years old, many are empty-nesters; any children at home are typically in their twenties. These residents have the time, money and agility for travel, golf and fitness activities. Fond of cultural activities, residents regularly go to art galleries, the opera, theatre and local exhibits and fairs. They believe in the value of community involvement, engaging in social issues and political campaigns, and giving to a wide range of charities.








Source: [www.explorewaterlooregion.com](http://www.explorewaterlooregion.com)


## 4. SOARR Analysis

To help shaping the priorities within the Experience Wellington Tourism Strategy, an analysis of the Strengths, Opportunities, Aspirations, Risks and Results (SOARR) was prepared; this is a forward-looking model that takes elements that would traditionally be affiliated with a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis and uses insights gained through stakeholder consultations and economic analysis to inform a vision for the future and how to know when aspirations have been met.

A profound analysis of the strengths and aspirations can support the development of an asset-based strategy, in which identified opportunities can be leveraged while understanding possible risks; subsequent, objectives and specific action steps are designed to respond to the desired results.

The concepts underpinning the SOARR model are outlined in the figure below:

<b>S</b>	<b>Strengths</b> What are we doing well? What key achievements are we most proud of? What can we build on?	
<b>O</b>	<b>Opportunities</b> What are our best possible future opportunities? What changes in demand can we expect in the future? What broader trends and policies may affect development and impact on our aspirations?	
<b>A</b>	<b>Aspirations</b> What are we deeply passionate about and want to achieve? What difference do we hope to make for all?	
<b>R</b>	<b>Risks</b> What challenges do we need to be aware of? How will we recognize and mitigate or eliminate potential risks?	
<b>R</b>	<b>Results</b> How will we know we are succeeding? What are the key goals we would like to accomplish to achieve these results?	



**STRENGTHS**  
What can we build on?

- What are we doing well?
- What key achievements are we most proud of?
- What positive aspects have individuals and enterprises commented on?

### What are we doing well?


- **Diversity:** Wellington County offers visitors activities that serve different interests and age groups. The County has beautiful and diverse landscapes, and its offer builds on natural attributes, trail connections and the communities' strengths.
- **Character:** Wellington County has maintained its authenticity and uniqueness. The rural experiences, small-town charm and drive-in road trips have been crucial to attracting day trippers from nearby big cities.
- **County staff:** Staff from the economic development department are identified as strongly supporting businesses.
- **Preservation of heritage:** Investments in public buildings have supported the county's appeal.

### What achievements are we most proud of?

- **Brand recognition:** The vigorous promotion of Elora and Fergus brings a broader recognition of the County. Taste Real also gained significant awareness and is an excellent example of an initiative that could support businesses while promoting the wider region.
- **Marketing:** Initiatives like Rural Romp and Shop Local significantly increased visitations and retail sales.

## What can we build upon?

- **Previous initiatives:** Programs like Taste Real and the Crafts Gin Trail have provided a connection point for businesses to present a robust offer to visitors and gained recognition in communities outside of the County. This could be leveraged to participate in new initiatives such as the Micheline Guide for local restaurants.
- **Relationship with member municipalities:** The County has industry stakeholders willing to collaborate with supporting businesses and be involved in activities/festivals; this helps to improve buy-in from the whole community and provide support with budgeting.
- **Substantial assets:** The tourism industry can leverage known assets such as the Elora Gorge, Belwood Lake Conservation Area and Elora Mill Hotel & Spa to draw more visitors and present a broader experience.
- **Events and festivals:** Events like Riverfest, Fergus Scottish Festival and Erin Fall Fair are significant drivers of visitors to the County and represent a solid foundation to support investments to build capacity (e.g., larger facilities).
- **Forward-thinking stakeholders:** While industry stakeholders are interested in preserving the County's character, they are also open to collaborating in the name of industry growth and innovation.
- **Location:** The County has the advantage of being located near large markets (e.g. Greater Toronto, Kitchener, Waterloo and Guelph), which helps with tourism and workforce access.



### OPPORTUNITIES

What are our best possible future opportunities?

- What changes in demand do we expect to see in the future?
- What external forces or trends may positively affect development?
- What are the key areas of untapped potential?
- What weaknesses or threats can be converted into SMART improvements?

## What are our best possible future opportunities?

- **Business development:** Tourism operators are interested in developing a unified program through regional clusters, subgroups, or pockets of experiences. This includes creating packages for one or two-day suggested experiences and developing printed marketing material with information on Top Ten Must Do based on interests.
- **Agriculture:** There is an opportunity to capitalize on the well-established agriculture industry in the area; suggested subindustries to focus on include:
  - Farm-to-table tourism
  - Equine tourism
  - Outdoor recreation
  - Connection with local food and drink – tying in restaurants, breweries, and local shops.
- **Arts and culture:** Leveraging Wellington's heritage and cultural history, efforts could improve the museum network and further promote the Wellington County Museum and Archives with displays of each of the municipalities.
- **Keep momentum:** Take full advantage of Elora's reputation to promote the County and leverage the diversity of groups arriving in Wellington County to develop year-round tourism.
- **Social media promotion:** For many visitors, Wellington County is still a hidden gem, and while being attracted to the County for a specific business/attraction, once in-market, they need help to identify

what else there is to do. Improving online presence and social media promotion is crucial to activating visitors' curiosity and more profound research of the area.

- **Wayfinding:** There is an opportunity to improve wayfinding to facilitate visitors' access to information and discovery of the region and its businesses. While increasing digital presence is a priority, stakeholders identified the need to combine different elements, including maps, trail signage, directional signage, printed guides and gateways.
- **Alternative accommodations:** Industry leaders could explore ideas to develop auxiliary lodging, including benefiting from the existing campgrounds in the area to provide solutions for the need of more accommodation capacity.
- **Target residents:** Businesses should remember that although day trippers from big cities are part of their primary target, the communities within the County still represent a significant opportunity.


#### What changes in demand can we expect in the future?

- **Travel costs:** Due to increasing costs of living and travelling, more Canadians are discovering rural communities near them; this gives Wellington County the potential to capture more travellers in the near future. Attention should be given to considering the costs and way of travelling to develop itineraries that support the variety of experiences available in Wellington County.
- **Cycling tourism:** Cycling has gained popularity and has the potential to attract more visitors, especially building on the Ontario By Bike program.
- **Visitors' expectations:** Today's visitors expect accessible information and their experience to be as "easy" as possible; visitors' infrastructure and support are vital in meeting these expectations.
- **Sustainability:** Today's visitors are interested not only in eco-tourism, but discovering businesses that implement sustainable practices and responsible tourism. Innovative farming and circular economy represent an opportunity.

#### What broader trends and policies may affect development and impact our aspirations?

- **Accommodation regulations:** Regulations regarding Airbnb and campsites will be crucial in supporting or restraining the County's accommodation capacity.
- **Internet connectivity:** Visitors want access to public wi-fi. The ability to keep them connected and informed is key to influencing their tourism experience.
- **Filming permits and video filming:** Due to its natural assets and proximity to Toronto's sizeable film industry, Wellington County has the potential to promote this industry, which could support tourism spin-offs.





**ASPIRATIONS**  
What do we care deeply about achieving?

- What are we deeply passionate about?
- As a region, what difference do we hope to make (e.g. to residents, for institutions, to businesses)?
- What does our preferred future look like?

### What are we deeply passionate about and want to achieve?

- **Overarching website/portal:** The development of this resource will give visitors and tourism operators a big picture of the sector and what is happening regarding tourism in the County. This would support businesses to expand their network and collaborate while helping Wellington County to become a year-round destination.
- **One tourism industry voice:** The local industry is interested in unifying with one voice to have broader and better outreach and to guide decision-making on industry-specific matters throughout the County.
- **Become a food destination:** The local industry can leverage culinary talent and local connection with food to offer unique experiences that draw more visitors and elevate the offer.

### What differences do we hope to make for all?

- **Collaboration:** Increase joint work between businesses and organizations at a higher level, such as RTO4, to promote a strong offer.
- **Balanced growth:** As the tourism sector supports the regional economy, industry players recognize the importance of including residents, elected representatives and the community in decision-making to ensure a high quality of life, so they see the benefits of tourism.
- **Longer stays** There is strong interest in inviting visitors to slow down the pace and promote overnight stays in Wellington County and build more complete experiences. Trails to go through communities could support this.
- **Awareness:** Increase awareness of the County's offer beyond Elora and Fergus through unique experiences and activities for a broader range of people and needs.



**RISKS**  
How will we recognize and mitigate or eliminate potential risks?

- What challenges do we need to be aware of?
- What policy shifts could impact our aspirations?
- What contingencies should we have in place to address threats or unexpected consequences?

### What challenges do we need to be aware of?

- **Over-tourism:** Working to attract visitors while being so close to big cities represents the risk of drawing too many tourists. If not managed correctly, this can impact the quality of life in Wellington County and the tourism experiences themselves.
- **Environmental impact:** Associated with over-tourism, by receiving a more significant number of visitors, there is a higher risk of having more pollution, waste and an overall impact on the cleanliness of communities and tourist areas.

- **Labour force shortage:** Businesses across Canada, especially in the tourism sector, are finding it difficult to recruit talent. If more visitors come to the County, businesses and industry leaders need to ensure a sufficient workforce to serve visitors.
- **NIMBYism<sup>2</sup>:** Causing a negative experience and environment for residents could potentially cause NIMBYism.
- **Accommodation:** With interest across the industry to extend visitor's stays, providing sufficient capacity is crucial to deliver the expectation created in the marketing process.
- **Housing:** Insufficient capacity to provide sustainable and affordable housing for residents and workers could impact the sector significantly.
- **Transition to digital:** To concentrate exclusively on digital experience can result in the loss of the human factor for in-market experience and welcoming.
- **Culture:** Stores not being open during prime visitor hours affect visitors' experience.

#### What contingencies should we have in place to address threats or unexpected consequences?

- **Supporting infrastructure:** Supporting visitors with parking, shuttle transportation, public washrooms and other amenities can significantly impact their experience and residents' perception of the development of the industry.
- **Mixed housing inventory:** Ensure a mixed offer of housing to attract and retain a workforce that can live and work in the County.



#### RESULTS

How will we know we are succeeding?

- What are the key goals we would like to accomplish in order to achieve these results?
- What meaningful measures will indicate that we are on track toward achieving our goals?
- What resources are needed to implement our most vital projects and initiatives?

#### Indicators to reflect the achievement of aspirations include:

- The development of a tourism business inventory and a platform where companies can stay connected.
- Increased recognition of Wellington County as a place to visit, measured by the number of visitors.
- Development of new tourism destinations, products and infrastructure.
- Increase the tourism industry's presence at local, municipal and provincial tourism events.
- The designation of County staff to support tourism businesses with grant writing, online presence and social media promotion.
- The development of a marketing strategy.
- More events and experience development, including packages developed in collaboration between tourism businesses.
- Creating an industry event for tourism stakeholders to increase awareness of the regional offer and collectively work on lengthening the stay in the region.
- Increased accommodation capacity with Airbnb and glamping opportunities.
- Increased visitation at events and completions of post-event surveys to provide feedback to the County.
- Increase in overnight length and volume of visitors and duration of stay.
- Increased social media reach and website visits.

<sup>2</sup> Not In My Back Yard; the phrase and the acronym characterize opposition by residents to development in their local areas.



Source: Daily Hive

## 5. Strategic Directions

The United Nations' World Tourism Organization (UNWTO) defines tourism as a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors and tourism has to do with their activities, some of which involve tourism expenditure.<sup>3</sup>

Spending by locals on recreation, culture, entertainment, retail and meals is the recirculation of existing community wealth and is not considered tourism. However, local spending by locals is always encouraged because it reduces the amount of dollars leaving the area. Local spending opportunities should be addressed in retail market studies, recreation master plans, cultural plans, or buy-local campaigns.

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<sup>3</sup> Source: World Tourism Organization (UNWTO), the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism.

## 5.1 Alignment with existing Strategic Plans

The County of Wellington's 3-year Economic Development Action Plan identified the Experience Wellington Strategy as one of its key areas of focus, along with The Taste Real Local Food program, which builds on Wellington's County unique resources and businesses in the agriculture sector to become a known destination for agritourism and food experiences. Among the County's strategic priorities are the following:

- Support the local tourism sector to focus on understanding the large and complex tourism sector eco-system that exists in Wellington County.
- Facilitate tourism product development, by aiming to leverage tourism assets whose potential is not being maximized.
- Market and promote Wellington County experiences, by aiming to promote Wellington County and the various seasonal experiences the County offers while also ensuring the unique value proposition and messaging to potential visitors is relatable, accurate, and informative.

The City of Guelph, in its Economic Development and Tourism Strategy (2022-2026), identifies collaboration and partnership with Wellington County as important to building a solid tourism industry in the region. Objectives include supporting tourism-led projects for product development, investing in the local food industry, mapping Guelph's destination assets, and improving wayfinding practices.

## 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

The following Guiding Principles are locally relevant values that are based on guiding principles shaped by the Future of Tourism Organization Coalition:<sup>4</sup>

- **Collaboration**  
*Collaborate in destination management* – “Seek to develop all tourism through a collaborative management structure with equal participation by government, the private sector, and civil society organizations that represent diversity in communities.”
- **Quality**  
*Choose quality over quantity* – “Manage tourism development based on quality of visitation, not quantity of visitors, so as to enhance the travel experience while sustaining the character of the destination and benefiting local communities.”
- **Resilience**  
*Diversify source markets* – “In addition to international visitation, encourage robust domestic tourism, which

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<sup>4</sup> Source: <https://www.futureoftourism.org/guiding-principles>



may be more resilient in the face of crises and raise citizens' perceived value of their own natural and cultural heritage.”

- **Sustainability**

*Protect sense of place and reduce tourism's burden* – “Encourage tourism policies and business practices that protect and benefit natural, scenic, and cultural assets. Retain and enhance destination identity and distinctiveness. Diversity of place is the reason for travel.”

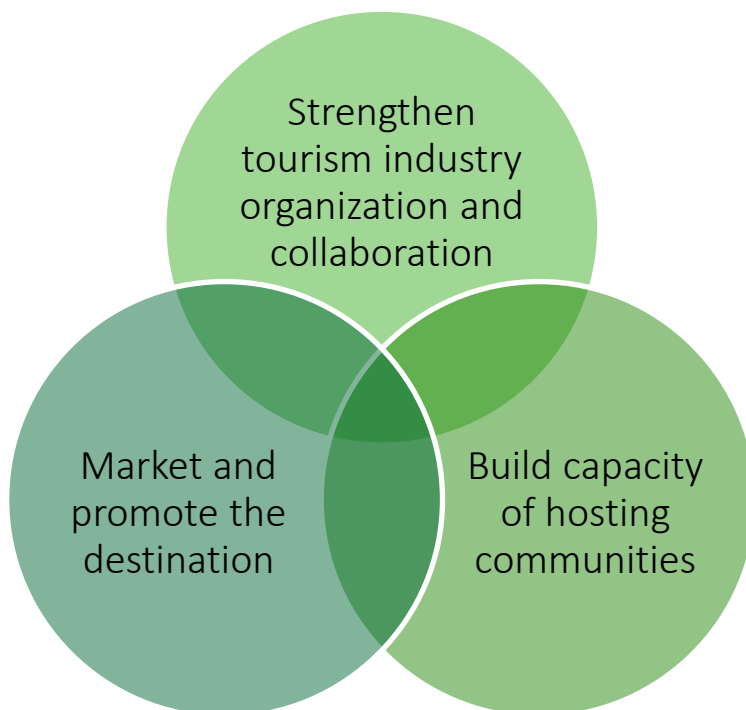
- **Stewardship**

*Operate business responsibly* – “Incentivize and reward tourism businesses and associated enterprises that support these principles through their actions and develop strong local supply chains that allow for higher quality products and experiences.”

## 5.2 Strategic Directions

Through the analysis of data, existing strategies, an understanding of the mission, vision and guiding principles that are leading efforts in Wellington County, coupled with the aspirations and opportunities identified throughout the consultation process, the following strategic directions were developed to guide the objectives and actions of the Experience Wellington Tourism Strategy.

**Figure 4: Strategic Directions**







Source: The Toronto Star

## 6. Scope of Tourism Service & Delivery Analysis

Tourism plays an important part in the broader economy within Wellington County. Natural assets, events and a strong agriculture are just some of the reasons that people visit the County. Visitors typically travel to the County by car and therefore are considered domestic tourists. There are a range of tourism stakeholders (beyond the tourism businesses themselves) that work to develop tourism products and market the region to these potential visitors.

There is a hierarchical approach to marketing a region to visitors that can be described as “macro to micro”. Nationally, Destination Canada is mandated to attract tourists to the Country, with specific marketing tactics and campaigns targeting the international visitor. Destination Canada is a Crown Corporation and markets the Country to nine key geographic leisure source markets with the highest potential for tourist to visit and travel

within Canada. Destination Ontario is the provincial tourism organization that is focused on the economic prosperity of the province by targeting visitors within Ontario, across Canada and to a lesser extent, internationally. Destination Ontario works with regional organizations to identify local tourism products and to collaborate on marketing campaigns. Ontario is comprised of 15 tourism regions and Wellington County is within Regional Tourism Organization Four that includes the counties of Huron, Perth, Waterloo and Wellington.

## 6.1. Current State

This section provides an overview of the types of services provided by all levels of government as well as organizations and associations that have a tourism focus. This information was derived through a stakeholder consultation session where participants provided detailed accounts of a wide range of service offerings. The services were aggregated under main tourism themes of: Local government and administrative services, tourism specific services, investment readiness and attraction, business retention and expansion, and collaboration.

Although the City of Guelph is not within the County, it has been included within this analysis due to its close proximity, existing and future opportunities to collaborate with regional partners and the interconnectivity of the region's economy.

The intention of this section is to identify the existing situation and to seek areas where these services can be refined to become more efficient and to reduce duplication of efforts. Specific areas where opportunities for improvement have been identified are described within the Strategic Action Plan section of this report.

### Local Government and Administrative Services

There are a multitude of tourism-related functions that municipalities are responsible for, and these were explored with tourism stakeholders in the County. These range from the collection of accommodation taxes to business licensing to providing public washrooms. An overview of these services is provided below.

Within Wellington County, no municipality collects municipal accommodation taxes. However, the City of Guelph does collect and reports on these taxes. The City of Guelph, Wellington North, and the Township of Centre Wellington collect business licenses that include those businesses within the tourism sector. Guelph, Centre Wellington and the County have public washrooms that are open for visitor usage. In the case of the County, public washrooms are located within its libraries and museum.

All local governments within the County are engaged in citizen communications, risk management and emergency preparedness. The County has limited outreach to service clubs, and this is an area of potential improvement. Although the County is involved with emergency management for the whole County, there is no specific contact list for tourism businesses.

Political advocacy is conducted through the City of Guelph's Inter-Governmental Affairs Office however there is little advocacy with Tourism Industry Association of Canada (TIAC) or Tourism Industry Association of Ontario (TIAO). The County has a Culinary Tourism Alliance that engages in advocacy work. The County and Elora-Fergus Tourism attend and participate in the TIAO Annual Conference. The RTO is not permitted to engage in political advocacy however they do participate in round tables to seek feedback from tourism organizations.

## Tourism Specific Services

Through discussions with tourism stakeholders, it is apparent that local government and not-for-profit organizations are providing a wide range of direct tourism services. Overall, the RTO4 support activities in Elora and Fergus predominantly; However, in collaboration with the County, it plays a supportive role for local municipalities by providing content for marketing campaigns and assisting with implementation strategies. Agri-tourism products and experiences are particularly strong across the County however, there are opportunities to diversify tourism offerings.

Stakeholder consultation and Erin's Economic Development Plan 2019-2023 identify that while Wellington County is RTO4 territory, previous engagement with the Headwaters Destination Marketing Organization (DMO) place the Town of Erin in a unique situation. The Town's businesses and events are being supported by RTO6 - Central Counties, which includes York, Durham and Headwaters. However, as part of Wellington County Erin could also be supported by RTO4.

All of the municipalities in the County engage in marketing tactics to attract visitors. City of Guelph focusses their attraction efforts on the "friends and family" market within a 40 km range. There is an opportunity to strengthen the partnerships with the local Chambers of Commerce on tourism marketing campaigns. The RTO assists with content creation for Elora and Fergus.

In terms of event coordination and product/experience development, Centre Wellington and Guelph are the most involved within the County with the RTO providing support to various organizations. The RTO has worked with Elora-Fergus Tourism on an animation program.

Guelph, Elora-Fergus Tourism and the County are engaged in familiarization for inbound travel trade as well as trip planning fulfillment and engagement. Centre Wellington is the only municipality active with an in-market tourism ambassador program with a direct-engagement program during the summer season. Centre Wellington also tracks visitor numbers and is working to gather more information in partnership with the local Museum. The RTO provides statistical information and supports visitor impact studies such as those conducted by Guelph and Centre Wellington.

Guelph Civic Museum and Centre Wellington have in-market visitor services and also track visitor perceptions and social media channels. Local Chambers of Commerce and municipalities provide information to visitors at Chamber offices and at local municipal facilities.

There is existing signage for visitors throughout the County, these programs have been supported by the RTO. Guelph is currently in the process of updating its wayfinding, interpretation and trails signage within the city.

## Investment Readiness and Attraction

Preparing for new investment into the community requires an understanding of available land and buildings as well as suitable business uses for those spaces. Once there is an understanding of the "inventory", municipal staff then actively promote and seek out potential investors both external to the community and also striving to help local businesses grow.

Five of the seven the local municipalities have economic development professionals that are focused on investment attraction efforts. The County lists investment attraction as a core activity and engagement with both local municipalities, the province and potential investors. RTO4 provides a link to the Ontario Invest offices and provides introductions and support to facilitate investment transactions.

## Business Retention and Expansion

An integral part of any community's development programming is supporting local businesses. Understanding the needs of local businesses and providing services is critical to ensure that businesses remain within the municipality and also to foster business growth.

The County works with local municipalities to conduct ongoing business visits and helps to coordinate efforts between business groups and organizations such as the Chambers of Commerce, Grow Guelph Partners, Business Centre, Innovation Guelph and post-secondary institutions.

In addition to the latter organizations, Launch It Minto, Town of Erin business learning hub, Wellington-Waterloo Community Futures, the Saugeen Economic Development Corporation and the Business Improvement Associations throughout the County offer workshops, events and training programs to support local businesses. RTO4 supports these efforts by providing digital capacity workshops and partnering with the Chambers for their "Ask the Experts" events.

The Chambers of Commerce within Centre Wellington and Guelph have business awards and symposiums that are broad in scope but include tourism businesses. TIAO and Economic Developers Council of Ontario (EDCO) hold annual conferences and recognize tourism businesses, programs and initiatives.

Tourism businesses will often require additional funding for business expansion or other initiatives that will improve their situation. Due to the impacts of the COVID-19 pandemic, the County provided support to local tourism businesses through the Keep Well Emergency - Business Sustainability Fund and the Tourism Adaptation and Recovery Fund. The City of Guelph also offered pandemic related support and is considering allocating Municipal Accommodation Tax funds to support future programs. Centre Wellington has a community investment support grant that includes tourism-based projects.

All of the municipalities and the County have Community Improvement Programs that help to fund tourism businesses. The Centre Wellington Chamber of Commerce, Saugeen Economic Development Corporation, Wellington-Waterloo Community Futures and Guelph's small business and innovation centres all provide small business grants.

Workforce and resident attraction are important elements to support and grow local tourism operations and products. The City of Guelph Economic Development Office, Centre Wellington Chamber and the County (there is a dedicated staff person focused on talent attraction), with support from the RTO are all working on various projects and initiatives to address labour needs.

## Collaboration

Collaboration between all stakeholders is critical in order to effectively promote a region and support local tourism businesses. Currently, this is an area that deserves greater attention and can be improved upon.

## 6.2. Service Delivery Models

Across the province, and indeed the country, there is a vast array of approaches and types of organizations that market a region to potential visitors. The diversity of the approaches to destination marketing/management is reflective of the geography of the area, the tourism product offerings, staff capacity and operational budgets. Whether a formal DMO or a more ad hoc DMO, broadly there are three organizational structures to identify and promote a region to visitors.

1. A formal DMO (typically a not-for-profit society) that has a board of directors' representative of tourism stakeholders and includes local government. The majority of funding for the DMO is through a tax on accommodations with additional funding from the local or regional government; as reflected by the TIAC 2020 survey to Destination Marketing Associations, that revealed that more than half of the surveyed DMOs rely on accommodation tax as part of their annual revenue and for more than a third, this tax is the source of 75% or more of their annual revenues<sup>5</sup>. Some DMOs also receive funding through tourism stakeholders either as individual memberships or aggregated based on tourism operators (for example, all of the golf courses within the region would pool funds).
2. A Municipal Tourism Department that is staffed with local/regional government employees and funded through a combination of municipal taxation, accommodation tax and grants. Local Council would determine operating budgets for this model. Specific marketing campaigns may be additionally funded by tourism stakeholders.
3. An arms-length organization with a tourism contract that stipulates funding and specific objectives of the organization. This model is commonly a fee-for-service contract between a municipality and an established organization with the latter responsible for staffing and often operating a physical location such as a Visitor Centre.

Through the analysis of the existing tourism service delivery within Wellington County, a formalized DMO model may be premature. Instead, establishing a Tourism Advisory Committee would be the recommended first step to continue to understand tourism assets within the region, engage tourism stakeholders to meet frequently and collaborate together, and determine funding resources to conduct targeted marketing campaigns. The Tourism Advisory Committee could be established by Wellington County Council or function more informally.

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<sup>5</sup> TIAC Survey Canada's Destination Marketing Organizations (DMOs) and COVID-19 Impact.





Source: aberfoyleantiquemarket.com

## 7. Strategic Action Plan

The strategic action plan has been developed for the Experience Wellington Tourism Strategy to focus on how to best stimulate and support tourism in Wellington County. Recommended actions are listed to progress the strategic directions and their objectives.

The recommended actions were developed based on the aspirations, reflections and insight of tourism businesses and industry stakeholders, the data analyzed, and feedback received through the engagement process. These businesses and organizations are contributors to the Wellington County tourism industry, and their needs and interests helped guide the following actions.

The implementation of actions, structuring, delegation and resourcing of specific initiatives must be designated and undertaken by the County in collaboration with other municipalities and organizations and the implementation of its three-year Economic Development Action Plan. Approval will be sought if Council support is needed for specific changes to service levels or new resources.

## Strategic Direction 1: Strengthen tourism industry organization and collaboration

The tourism industry in Wellington County has a robust ecosystem, integrated by an inventory of businesses with different offerings, experience to build from and various stakeholders that currently work to support and further develop the sector. Focus should be given to strengthening these collaborations as doing so provides a space to identify gaps, opportunities, knowledge sharing and a robust planning process for the sector, leveraging each stakeholder's expertise.

### Objective 1A: Elevate partnerships in the tourism industry ecosystem

<b>Actions</b>	<ul style="list-style-type: none"> <li>• Collaborate on local tourism industry planning and place-making</li> <li>• Leverage each municipality's reputation to promote the County</li> <li>• Involve diverse groups arriving to Wellington County</li> <li>• Develop year-round tourism experiences</li> <li>• Develop specific tourism action plans for municipalities</li> <li>• Connect the quality of life of local residents with the visitor experience</li> <li>• Explore a pooled Municipal Accommodation Tax (MAT) to fund expanded Community Improvement Plans (CIP) incentives and marketing campaigns</li> <li>• Support innovation and the creation of new tourism businesses and new jobs</li> <li>• Collaborate with organizations such as the Rainbow Diversity Institute and promote Diversity, Equity and Inclusion to build a comfortable and welcoming working environment</li> </ul>
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<b>Time Frame</b>	Medium Term
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### Objective 1B: Build bridges to regional tourism success

<b>Actions</b>	<ul style="list-style-type: none"> <li>• Share information and resources (e.g., semi-annual meeting/summit)</li> <li>• Develop key performance indicators to measure the economic and social impact of tourism (e.g., increased tourism spending, new tourism operators, increased community involvement as ambassadors, etc.)</li> <li>• Align County-wide tourism sustainability initiatives with RTO4's Destination Sustainability Stakeholder Committee<sup>i</sup></li> <li>• Explore opportunities to collaborate with Indigenous tourism operators</li> <li>• Better integrate tourism, economic development, and talent attraction</li> <li>• Improve the museum network and promoting the Wellington County Museum and Archives with municipality-specific displays in the museum and support the implementation of the new Wellington County Museum and Archives (WCMA) Visitation Experience Plan.</li> <li>• Leverage the benefits of memberships in provincial, federal and subject-specific alliances, e.g., Western Ontario Wardens Caucus (WOWC), TIAO, TIAC</li> </ul>
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<b>Time Frame</b>	Short to Medium Term
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## Strategic Direction 2: Build capacity of hosting communities

Tourism operators' and communities' desires must be better understood and supported; efforts should be directed into enabling established and emerging businesses to develop the necessary skills and competencies to leverage available resources to work proficiently. Therefore, growing the business and visitor support infrastructure is crucial to deliver an exceptional experience.

### Objective 2A: Enhance tourism infrastructure and supports

<b>Actions</b>	<ul style="list-style-type: none"> <li>Engage tourism stakeholders as part of a continuous business retention and expansion program</li> <li>Develop capabilities in data management and digital strategies to maintain and update information about tourism businesses</li> <li>Develop a public tourism amenities plan (e.g., public washrooms, trails, etc.)</li> <li>Leverage local transport networks to disperse visitors across Wellington County and beyond.</li> <li>Create a responsive plan to ensure adequate availability of housing for tourism workers</li> <li>Improve wayfinding to facilitate visitor's access to information and discovery of the region and its businesses (visitor info centres, signage, digital connections).</li> <li>Utilize signage to include symbols that educate visitors on rules, services and infrastructure found in a destination such as public toilets, location of trash cans and no littering.</li> <li>Establish a tourism talent and training network, leveraging current educational and workforce assets (workforce development, customer service)</li> <li>Develop a Risk Management Assessment for the County's tourism industry and terroir</li> <li>Designate additional County staffing resources for the tourism industry</li> <li>Expand the number, diversity, and accessibility of overnight accommodation options (e.g., glamping, short-term rentals)</li> <li>Improve wi-fi and cell phone coverage</li> </ul>
<b>Time Frame</b>	Medium to Long Term

### Objective 2B: Facilitate the viability, resilience, and expertise of tourism operators

<b>Actions</b>	<ul style="list-style-type: none"> <li>Deliver authentic experiences</li> <li>Improve understanding of opportunities related to high-value guests<sup>6</sup></li> <li>Explore expanded revenue-generating opportunities for operators (e.g., new experiences, pricing strategies, grant opportunities, etc.)</li> <li>Improve online presence and engagement tools for operators</li> <li>Expand operator networks and desire to collaborate</li> <li>Encourage operator participation in cooperative marketing opportunities</li> </ul>
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<sup>6</sup> High-value guests (HVGs) have a higher-than-average income, travel more frequently and show intentions of travelling within the next two years. HVGs also have a greater lifetime value as guests to Canada because they return more often. HVGs are naturally curious, actively seeking culture, engaging with locals, value experiences over price, and love what Canada offers. They spend their money on local goods and services that re-circulate in Canada's economy, generating greater return-on-marketing-investment and higher GDP for Canada compared to other guests. Source: [Destination Canada](#)

- Develop a volunteer ambassador program to support events and activations
- Increase joint work between businesses and organizations at a higher level (e.g., RTO4, Destination Ontario, inbound operators) to promote a stronger tourism offer
- Promote knowledge sharing and encourage business operators to follow sustainable practices as key part of their operations but also as a central element of offered experiences and visitor engagement
- Work with operators and communities 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 to explore, experience, work and live in Wellington County

**Time Frame** Medium Term

## Objective 2C: Increase Tourism Product Knowledge and Awareness

- Actions**
- 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
  - Upskill tourism industry workers to cross-promote key destinations within Wellington County

**Time Frame** Short to Medium Term

## Strategic Direction 3: Market and promote the destination

Tourism businesses are highly interested in communicating their offer across the County and to potential visitors to expand their understanding of what is there to discover in Wellington County. Marketing efforts led by local collaborating authorities and partners are necessary to support this process and to build and communicate a clear identity based on the community's values and aspirations.

## Objective 3A: Populate the tourism product catalogue

- Actions**
- 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

**Time Frame** Long Term

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## Objective 3B: Update Target Markets and Sales Tactics

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- Actions**
- Enhance target markets for high-value guests (i.e., better understand the motivations, communications preferences, and origin communities of high-value guests)
  - Expand sales capability and delivery in key source markets (i.e., implement a specific tactical marketing and promotions plan, as well as tools and resources, to identify, target, and communicate to high-value guests, to sell them on booking overnight stays in Wellington County)
  - Integrate visitor services into the in-market fulfilment of the visitor experience (i.e., ensure that the destination is delivering on what was promised when the visitor arrives)
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**Time Frame** Medium Term

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## Objective 3C: Develop value propositions and product storytelling

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- Actions**
- 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
  - Develop an engagement plan to bring all relevant stakeholders, community and industry on board with the new proposition and ensure that their role in the delivery of the proposition is clear
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**Time Frame** Medium to Long Term

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## Objective 3D: Implement and measure promotional tactics

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- Actions**
- Develop printed marketing material that visitors can receive through the County with information of "top ten must do" based on their interests
  - Produce supporting content and toolkits for industry and stakeholders
  - 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)
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**Time Frame** Medium to Long Term

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Source: [wellingtonadvertiser.com](http://wellingtonadvertiser.com)

## 8. Conclusions

Wellington County is emerging from the tourism industry's downturn resulting from the COVID-19 pandemic. However, like other destinations across Canada, the recovery has been challenging to predict. Tourist behaviour and decision-making have shifted to more local and regional, focusing on day trips and shorter stays at a destination. Visitors also seek authentic and unique experiences that often centre on open spaces and the outdoors. Fortunately for Wellington County, the proximity to the Greater Toronto Metropolitan area has resulted in an influx of "rubber tire traffic" or those taking the relatively short drive to explore the region's natural assets, experience the abundance of agri-tourism offerings and enjoy dining at the variety of restaurants within the County.

The County's municipalities, organizations and businesses have worked hard to draw tourists in and manage the rapid resurgence of visitors to the area. For tourism businesses and operators, scaling up post-pandemic has been fraught with labour and supply chain issues. Despite these challenges, the County has been adapting to these pressures, and tourist satisfaction levels are very high. Tourism businesses and operators have provided meaningful and rewarding experiences to their guests, as evidenced by increased tourism numbers.

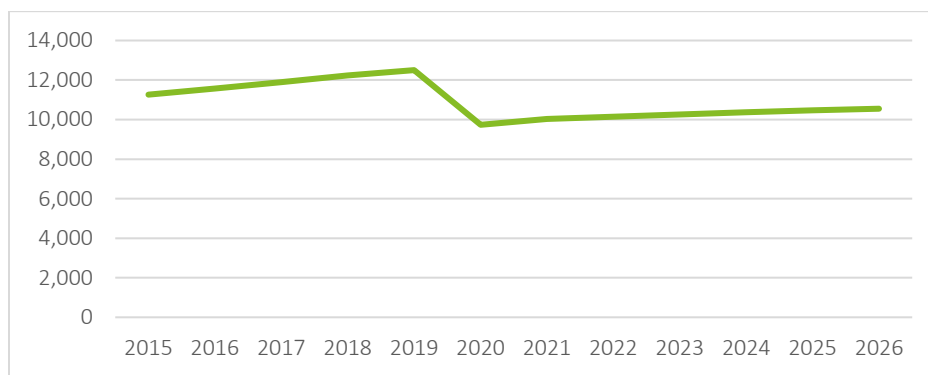
In the future, a key area of focus will be collaboration between the tourism providers and those promoting the site as a destination of choice. For tourism businesses and operators, developing a greater holistic awareness of the tourism products and services in the County must be a focal point. This will not only help to refine their respective offerings and clarify their unique value propositions but will also enhance the tourists' experiences (and ideally extend their stays) by referring customers to the broader offerings within the County.

# Appendix

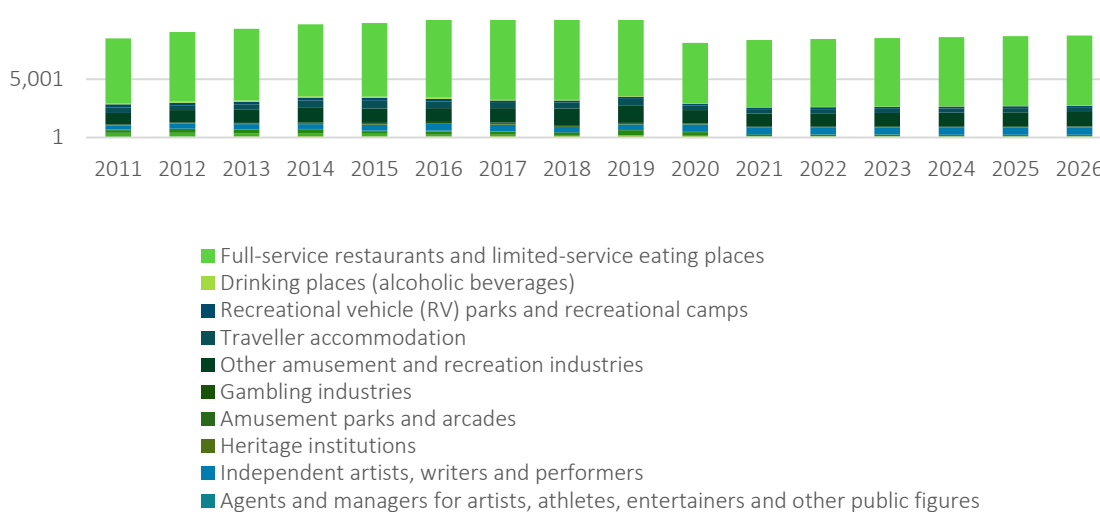
## 1. Economic Impact Assessment

**Employment:** For 2022, the tourism sector supported 10,142 jobs and is expected to reach 10,556 by 2026. While these numbers reflect an improvement from 2021, it is still not at pre-covid levels, and its recovery is expected to be slow but steady. The sub-sector in the tourism industry with the highest job creation in Wellington County is restaurants, with 5,804 supported jobs in 2022.

**Figure 1: Total Job Creation in Wellington Tourism Sector**

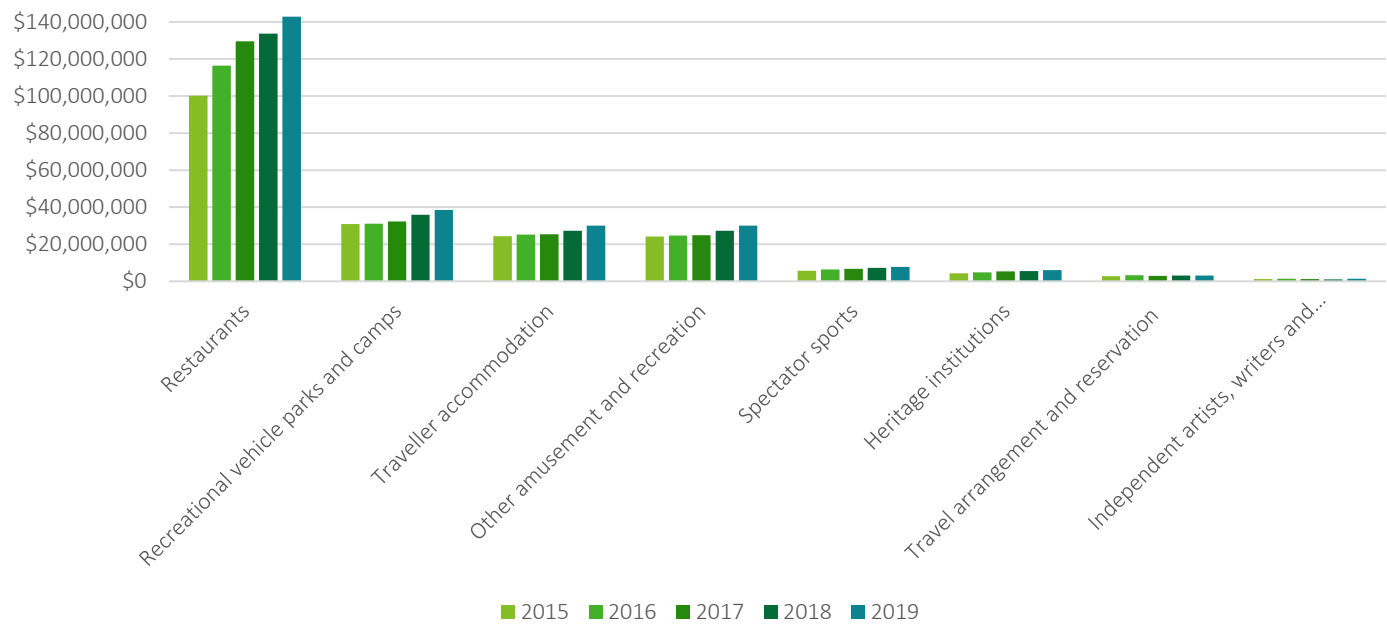


**Figure 2: Job Creation in Wellington Tourism Sector by Sub Sectors**



**Exports:** Exports represent the goods and services of the tourism sector purchased by enterprises/individuals from outside of the region. In understanding how much tourism goods and services is exported, we can understand the demand on Wellington’s tourism sector. For Wellington County the larger exporting subsector is Restaurants, followed by the Recreational Vehicle Parks and Camps. Figure 3 breaks down the exports below for years 2015-2019. More current data is not yet available.

Figure 3: Tourism Exports – Wellington County



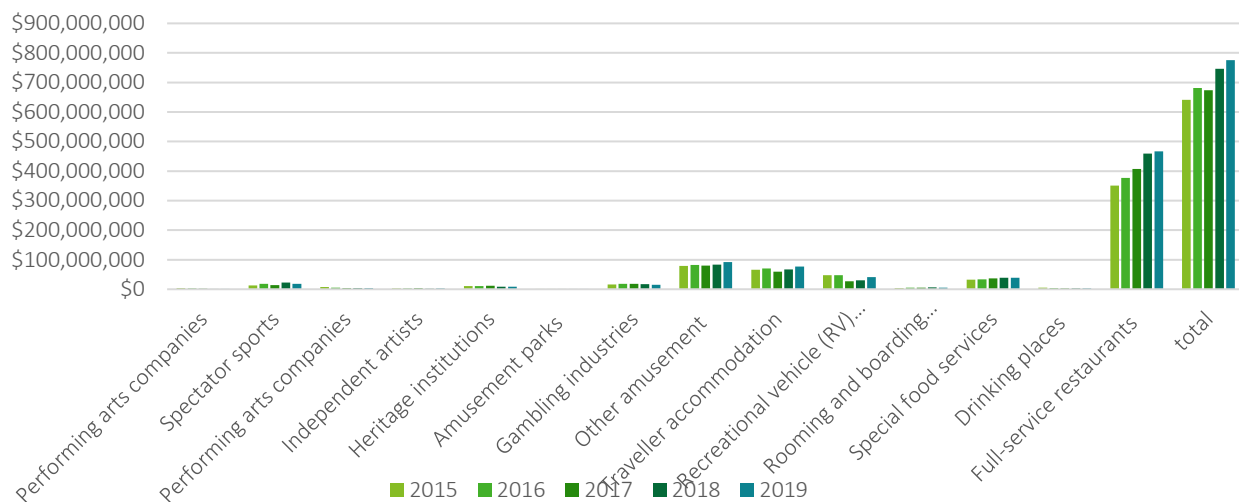
**GDP or Sales:** The sales of an industry indicate the total production in that sector and are used as an indicator for current and projected growth. Industry sales were \$775,734,398 in 2019, with restaurants leading at \$467,279,442.

Figure 4: Total Sales for Wellington County - Tourism Sector



The largest portion of sales is attributed to full-service restaurants in all years from 2015-2019, as well as the accommodations sector.

**Figure 5: Total Sales for Wellington County by Tourism Subsectors**



**Supply Chain:** As part of the tourism industry supply chain (products and services required for the operation of the industry), in Q1 2022, meat product manufacturing and dairy products manufacturing accounted for the industry supply with highest total purchases, with \$37,608,987 and \$18,674,878 respectively; of these, the 100% and 99.6% are bought insight Wellington County. This means tourism operators who require these products are able to find it and choose to buy it in Wellington and reflects that the county has the capacity to support the industry while retaining the purchases in-region. Other subindustries ranked in the top ten of total purchases, with 100% in-region purchases, include beverage manufacturing and farms.

Furthermore, subsectors also account for the top 10 purchases in the industry supply chain but for which the county depends on out-of-region purchases are lessors of real estate with \$18,008,304 or 75% followed by motion picture and video industries with a total of \$9,275,461 or 76%.

**Figure 6: Supply chain purchases in Wellington County by Tourism Subsectors**

Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
Meat product manufacturing	\$37,608,580	100.0%	\$406	0.0%	\$37,608,987
Dairy product manufacturing	\$18,609,304	99.6%	\$65,575	0.4%	\$18,674,878
Lessors of real estate	\$4,374,371	24.3%	\$13,633,933	75.7%	\$18,008,304
Petroleum and coal product manufacturing	\$7,002,823	40.8%	\$10,174,141	59.2%	\$17,176,965
Beverage manufacturing	\$15,432,943	100.0%	\$0	0.0%	\$15,432,943
Farms	\$12,112,985	100.0%	\$55	0.0%	\$12,113,039
Other food manufacturing	\$6,944,595	59.6%	\$4,714,237	40.4%	\$11,658,833
Bakeries and tortilla manufacturing	\$6,584,267	66.5%	\$3,322,324	33.5%	\$9,906,591
Motion picture and video industries	\$2,168,311	23.4%	\$7,107,149	76.6%	\$9,275,461



Depository credit intermediation	\$2,497,773	29.2%	\$6,042,149	70.8%	\$8,539,922
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**Staffing Patterns:** Most of the occupations employed in the industry are food counter attendants, kitchen helpers and related support occupations, representing 19% of the total jobs in the industry in 2021, followed by food and beverage servers, representing 8.3%. Overall, the total number of employees within the top 10 occupations of the tourism industry is expected to continue growing by 2028, with the exception of cashiers, this is not exclusive to Wellington County but seeing across the country with the adoption of more self-checkout equipment.

**Figure 7: Staffing patterns in Wellington County by Tourism Subsectors**

Description	Employed in Ind. Group (2021)	Employed in Ind. Group (2022)	Employed in Ind. Group (2028)	Change (2022 - 2028)	% Change (2022 - 2028)	% Of Total Jobs in Ind. Group (2021)
Food counter attendants, kitchen helpers and related support occupations	1,919	1,922	1,978	56	3%	19.1%
Food and beverage servers	835	853	940	87	10%	8.3%
Cooks	713	713	717	4	1%	7.1%
Restaurant and food service managers	629	631	638	7	1%	6.3%
Bus drivers, subway operators and other transit operators	554	560	588	28	5%	5.5%
Maitres d'hôtel and hosts/hostesses	469	488	571	84	17%	4.7%
Food service supervisors	431	435	463	29	7%	4.3%
Program leaders and instructors in recreation, sport and fitness	358	365	400	35	9%	3.6%
Cashiers	319	313	300	(12)	(4%)	3.2%
Taxi and limousine drivers and chauffeurs	288	299	334	35	12%	2.9%

**Multipliers:** Being a multi-faceted interdisciplinary industry, tourism has the potential to generate income and employment both **directly** and **indirectly**. Direct effects are associated with immediate tourism expenditures, e.g., the number of hotel bookings and number of jobs in hospitality sector. Indirect effects are caused in the economy due to recirculation of the industry's receipts in other supply-chain sectors.

While there was no such multiplier available publicly for Wellington County, the regional estimates of the tourism sector multiplier serve as an approximation for understanding how far a dollar earned in the tourism industry multiplies through the economy to generate income for other sectors. The table below reports the multiplier for three areas: the total sales multiplier, the employment multiplier, and the wage multiplier. The sales multiplier determines how far one dollar of sales recirculates through other sectors within the economy. The employment multiplier measures how the variation of jobs within the tourism industry translates into employment changes in the broader regional economy. The wage growth multiplier determines how a dollar in wages earned multiplies through the entire economy.

**Figure 8: Multipliers in Wellington County by Tourism Subsectors**

Industry	Sales Multiplier	Employment Multiplier	Wage Multiplier
Gambling industries	1.9689	2.172	1.9863

Rooming and boarding houses	1.4556	1.318	1.5638
Drinking places (alcoholic beverages)	1.8779	1.1515	1.5017
Travel arrangement and reservation services	1.6278	1.3748	1.4998
Performing arts companies	1.6694	1.3153	1.4907
Promoters (presenters) of performing arts, sports, and similar events	1.6316	1.4683	1.4586
Traveler accommodation	1.4223	1.252	1.4371
Amusement parks and arcades	1.6724	1.1798	1.4366
Heritage institutions	1.5817	1.5308	1.4192
Special food services	1.6837	1.1869	1.3714
Independent artists, writers, and performers	1.5116	1.4057	1.3659
Full-service restaurants and limited service eating places	1.6718	1.1552	1.3626
Recreational vehicle (RV) parks and recreational camps	1.2933	1.2821	1.3401
Other amusement and recreation industries	1.4541	1.1485	1.2887
Spectator sports	1.4117	1.1948	1.2883
Agents and managers for artists, athletes, entertainers, and other public figures	1.00	0.00	0.00

Note: Due to the data constraints of not being a Wellington-specific multiplier, regional multipliers were used for this analysis.

As indicated above, the largest wage multipliers are from gambling industries, followed by rooming and boarding houses, and drinking places. While the gambling industry does not employ the largest portion of the tourism sector, its impacts are attributed largely to indirect tourism, as individuals who come from afar to participate in gambling activities also spend on other areas such as food, services, and accommodations sector.

Other sectors that produce high sales multipliers are food and drinking places, followed by specialty food services, amusement parks and arcades, and performance of arts and events.

## 2. Visitor Spending Analysis

### Total Spending

Figure 8 describes the total estimated spending for 2021. The total amount spent by all Canadians in Wellington County was almost \$600 million. The majority of the expenditure (\$228 million or 38%) was on fuel, followed by hardware and furnishing stores<sup>1</sup> (\$110 million or 18%), and restaurants and drinking places (\$76 million or 13%).

**Figure 9: Estimated Local vs. Visitor Spending, 2021, Wellington County**

Industry	Spending Category	2021	
		Total Estimated Spending	% Of Total Estimate
Total	<b>Total</b>	<b>\$599,909,450</b>	<b>100%</b>
	Local	\$335,713,860	56%
	Visitor	\$264,195,590	44%
Camping, Hotel, Recreation and entertainment, Car rental, taxi and limousine	<b>Total</b>	<b>\$26,973,084</b>	<b>4%</b>
	Local	\$7,596,600	28%
	Visitor	\$19,376,483	72%
Clothing, footwear, Hobby, novelty, souvenir, and toy shops	<b>Total</b>	<b>\$13,222,261</b>	<b>2%</b>
	Local	\$6,202,298	47%
	Visitor	\$7,019,963	53%
Fuel	<b>Total</b>	<b>\$228,550,616</b>	<b>38%</b>
	Local	\$124,073,861	54%
	Visitor	\$104,476,754	46%
General Miscellaneous stores	<b>Total</b>	<b>\$56,368,706</b>	<b>9%</b>
	Local	\$45,373,806	80%
	Visitor	\$10,994,900	20%
Groceries and alcohol	<b>Total</b>	<b>\$17,080,142</b>	<b>3%</b>
	Local	\$11,014,546	65%
	Visitor	\$6,065,597	35%
Hardware and furnishing Stores	<b>Total</b>	<b>\$110,562,472</b>	<b>18%</b>
	Local	\$64,075,953	58%
	Visitor	\$46,486,519	42%
Other - Books, Stationery, Jewelry, Tobacco, and Pharmaceuticals	<b>Total</b>	<b>\$48,535,511</b>	<b>8%</b>
	Local	\$37,099,276	76%
	Visitor	\$11,436,235	24%
Other General (not categorized elsewhere)	<b>Total</b>	<b>\$22,223,948</b>	<b>4%</b>
	Local	\$78,764	0%
	Visitor	\$22,145,184	100%
Restaurants and drinking places	<b>Total</b>	<b>\$76,392,710</b>	<b>13%</b>
	Local	\$40,198,757	53%
	Visitor	\$36,193,953	47%

Source: Deloitte Analysis of Moneris Data

<sup>1</sup> Moneris frequently groups two or more MCCs to retain privacy of the businesses that belong to these categories. In the case of "Hardware and furnishing Stores" Hardware Stores comprises Hardware equipment and supplies and Hardware stores while Furnishing includes Equipment, Furniture, and Home Furnishings Stores (except Appliances) and Miscellaneous House Furnishing Specialty Shops.

**Figure 10: Top 15 Origin Communities, 2021 - Visitor Spending in Wellington County**

Selected Visitor Spending in Wellington County	2021	
	Total Estimated Visitor Spending	% Of Estimated Visitor Spending
<b>Total Visitor Spending</b>	<b>\$264,195,590</b>	<b>100%</b>
Guelph	\$52,451,906	20%
KW Region	45,721,617	17%
North Perth	\$21,435,334	8%
Orangeville	\$20,500,178	8%
Toronto	\$17,069,212	6%
Mississauga	\$9,400,687	4%
Hamilton	\$8,384,691	3%
Brampton	\$7,745,888	3%
Hanover	\$6,730,610	3%
Milton	\$5,907,973	2%
Halton Hills	\$5,552,492	2%
Burlington	\$5,330,128	2%

The following tables display the top spending origin communities by subindustry:

**Figure 11: Top 10 visitor origin locations for estimated spending on Camping, Hotel, Recreation and entertainment, Car rental, taxi and limousine in Wellington County**

Camping, Hotel, Recreation and entertainment, Car rental, taxi and limousine	
Origin	2021
Guelph	21%
Toronto	10%
Kitchener	7%
Cambridge	7%
Waterloo	6%
Halton Hills	6%
Mississauga	5%
Orangeville	5%
Brampton	4%
Oakville	3%

**Figure 12: Top 10 Clothing, footwear, Hobby, novelty, souvenir, and toy shops in Wellington County**

Clothing, footwear, Hobby, novelty, souvenir, and toy shops	2021
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Orangeville	14%
Guelph	10%
Kitchener	8%
Waterloo	8%
Toronto	7%
North Perth	6%
Halton Hills	5%
Cambridge	4%
Brampton	3%
Oakville	3%

**Figure 13: Top 10 visitor origin locations for spending on Fuel in Wellington County**

Fuel	2021
Guelph	25%
North Perth	12%
Orangeville	7%
Kitchener	5%
Woolwich	4%
Waterloo	4%
Toronto	4%
Hanover	3%
Mississauga	3%
Brampton	3%

**Figure 14: Top 10 visitor origin locations for spending on General Miscellaneous Stores in Wellington County**

General Miscellaneous Stores	2021
Guelph	21%
Orangeville	16%
Woolwich	6%
Kitchener	5%
Toronto	5%
Waterloo	5%
Brampton	4%
Mississauga	3%
Milton	3%
Hamilton	3%



Figure 15: Top 10 visitor origin locations for spending on Groceries and alcohol bought in stores in Wellington County

Groceries and Alcohol	2021
Guelph	31%
Woolwich	12%
Brampton	8%
Mississauga	5%
Orangeville	5%
Waterloo	5%
Toronto	4%
Halton Hills	4%
Collingwood	3%
Kitchener	3%

Figure 16: Top 10 visitor origin locations for spending on Hardware and Furnishing Stores in Wellington County

Hardware and Furnishing Stores	2021
Guelph	16%
Woolwich	13%
North Perth	11%
Orangeville	11%
Hamilton	5%
Mississauga	4%
Hanover	4%
Burlington	3%
Oakville	3%
Waterloo	3%

Figure 17: Top 10 visitor origin locations for spending on Other - Books, Stationery, Jewelry, Tobacco, and Pharmaceuticals in Wellington County

Other - Books, Stationery, Jewelry, Tobacco, and Pharmaceuticals	2021
Guelph	31%
Orangeville	15%
Woolwich	9%
Waterloo	5%
Toronto	5%
Kitchener	4%
North Perth	3%
Brampton	3%
Halton Hills	2%
Mississauga	2%

Figure 18: Top 10 visitor origin locations for spending on Other General (not categorized elsewhere) in Wellington County

Other General (not categorized elsewhere)	2021
Toronto	20%
Hamilton	6%
Mississauga	5%
London	4%
Ottawa	4%
St. Catharine's	3%
Burlington	2%
Kitchener	2%
Brampton	2%
Oakville	1%

Figure 19: Top 10 visitor origin locations for spending on Restaurants and drinking places in Wellington County

Restaurants and Drinking Places	2021
Guelph	19%
Woolwich	9%
Toronto	8%
Orangeville	7%
Waterloo	5%
Kitchener	5%
North Perth	5%
Mississauga	3%
Hamilton	3%
Brampton	3%

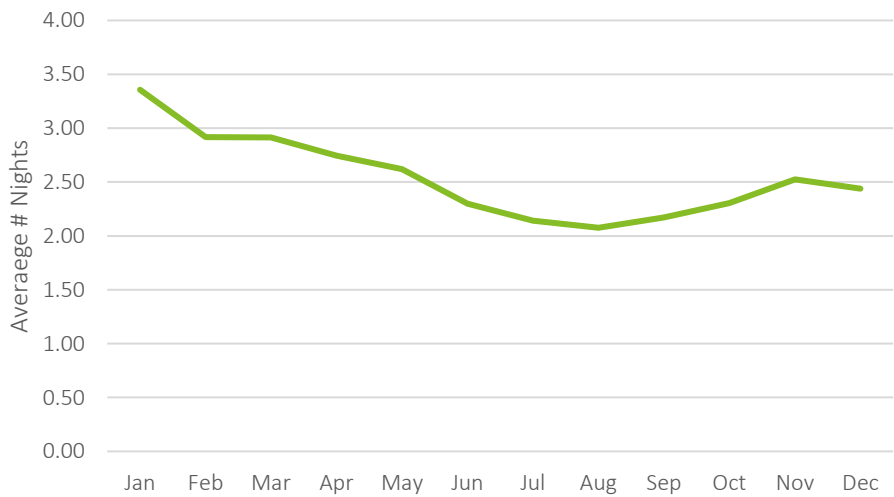
**Number of visitors:** Figure 20 shows the number of visitor parties<sup>2</sup> that made purchases in Wellington County in 2021 by month. A significant increase was experienced starting in May, reaching the peak in the month of August and followed by a sustained drop for the fall and winter months. There was also moderate growth in March.

**Figure 20: Number of visitor parties in Wellington County during 2021**



**Average Number of Nights Spent:** On average, visitors had shorter stays during the summer and fall months, reaching the lowest point in August with two nights on average. The number of night stays reached its peak during the year in January with 3.5 nights.

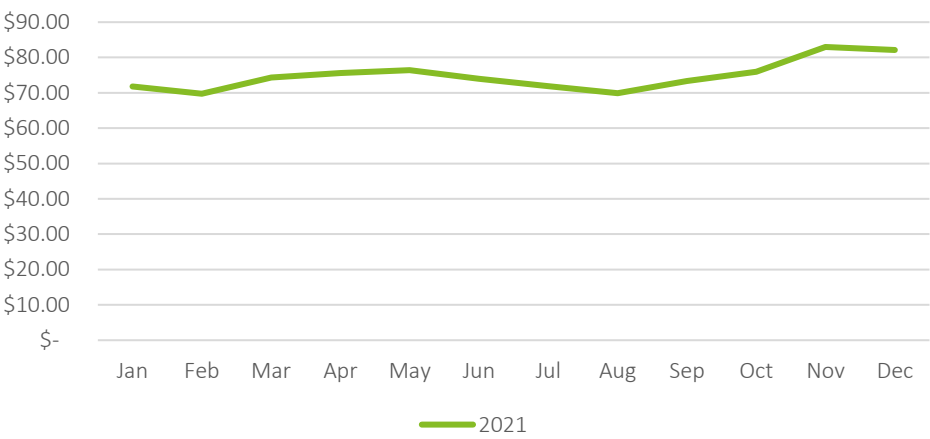
**Figure 21: Average number of nights spent per visitor in Wellington County 2021**



<sup>2</sup> For the purposes of this analysis, ‘visitor parties’ refer to the number of cardholders who visited and spent money in the target region.

**Average Amount Spent Per Visitor:** Visitors to Wellington County spent an average amount of \$74.75 dollars per visit. Figure 22 reveals a higher spend during the fall months, with the highest average in November. This suggests that despite the lower number of visitors compared with August, the individuals who visited Wellington County in November spent more on average during their visits.

**Figure 22: Average amount spent per visitor party in Wellington County 2021**



### 3. Visitor perception Analysis

To conduct the visitor perception analysis, the communities of Elora, Fergus, Erin, Guelph/Eramosa, Puslinch, as well as Harriston, Clifford and Palmerston (which were combined) were selected. Within each community or cluster, the businesses with higher Google and TripAdvisor reviews were utilized in the analysis. The following tables reflect these businesses per community

#### Harriston/Clifford/Palmerston

Figure 23: Top reviewed Businesses in Harriston/Clifford/Palmerston - 2022

	Asset Name	Google Rating	Google Reviews	Trip Advisor Ratings	Trip Advisor reviews
1	Harry Stone's	4.1	476	3.5	52
2	Granma Jo's	4.6	352	4	20
3	Cedar Rail Drive in Restaurant	4	211	3.5	21
4	King Hotel	4.2	147	4	56
5	The Smokin' Pig	4.3	159	4.5	11
6	Pike Lake Golf View Motel	4.5	50	4.5	25
7	Palmerston Railway Museum	4.6	66	4.5	7

#### Elora

Figure 24: Top reviewed Businesses in Elora - 2022

	Asset Name	Google Rating	Google Reviews	TripAdvisor Ratings	TripAdvisor reviews
1	Elora Gorge Conservation Area and Lookout	4.5	3057	4.5	440
2	Elora Brewing Company	4.4	1316	4	347
3	Elora Mill Hotel and Spa	4.6	1252	4	242
4	Gorge Country Kitchen	4.3	1027	4.5	187
5	Grand River Raceway	4.1	929	3.5	74
6	Shepherd's Pub	4.4	685	4	215
7	Elora Quarry Conservation Area	3.7	599	3.5	129
8	The Village Inn Elora	3.6	197	4	125
9	Drew House	4.9	54	4.5	83
10	Blown Away Glass Studio	4.7	111	4.5	25

#### Fergus

Figure 25: Top reviewed Businesses in Fergus - 2022

	Asset Name	Google Rating	Google Reviews	TripAdvisor Ratings	TripAdvisor reviews
1	Belwood Lake Conservation Area	4.4	1353	4	49



	Asset Name	Google Rating	Google Reviews	TripAdvisor Ratings	TripAdvisor reviews
2	Brewhouse On the Grand	4.4	842	4	339
3	The Goofie Newfie	4.3	839	4	225
4	Best Western Plus Fergus Hotel	4.1	296	4.5	251
5	The Breadalbane Inn	4.3	325	4	213
6	Fergus Tandoori Grill	4.5	294	4	164
7	Wellington County Museum and Archives	4.7	366	4.5	55
8	Scozia	4.3	178	4	131
9	Breadalbane Street Bistro	4.4	143	4.5	127
10	Fergus Grand Theatre	4.7	120	4.5	14

## Erin

Figure 26: Top reviewed Businesses in Erin - 2022

	Asset Name	Google Rating	Google Reviews	Trip Advisor Ratings	Trip Advisor reviews
1	Tin Roof Cafe	4.8	596	4.5	91
2	The Busholme	4.4	630	4	77
3	Judy's Restaurant	4.2	533	3.5	89
4	Holtom's Bakery	4.7	206	4.5	77
5	Maddie Hatter Tea Shop & Café	4.5	165	5	84
6	Hawkeye Bird and Animal Control	4.9	190	4.5	20
7	Angelstone Tournaments	4.4	102	5	4
8	Elliot Tree Farm	4.5	97	0	0
9	Tailwinds B&B	5	49	5	33
10	Calerin Gold Club	4.1	75	3	9

## Guelph/Eramosa

Figure 27: Top reviewed Businesses in Guelph/Eramosa - 2022

	Asset Name	Google Rating	Google Reviews	Trip Advisor Ratings	Trip Advisor reviews
1	Rockwood Conservation area	4.6	3411	4	217
2	Strom's Farm	4.5	678	4	53
3	Chompin At the Bit Bar & Grille	4.3	350	4	115
4	Heaven on 7	4.4	248	4	127
5	Eramosa River Cafe	4.3	113	4	44
6	Bistro Barolo	4.5	39	4.2	78
7	Thatcher Farms	4.8	96	5	3
8	Hangout	4.7	89	5	3
9	Rockwood Farmers' Market	4.7	15	0	0

## Puslinch

Figure 28: Top reviewed Businesses in Puslinch - 2022

	Asset Name	Google Rating	Google Reviews	Trip Advisor Ratings	Trip Advisor reviews
1	Old Marina Restaurant & Gift Shop	4.3	3156	3.5	168
2	Aberfoyle Antique Market	4.5	963	4.5	134
3	Emerald Lake Trailer Resort & Water Park	4.2	669	4	28
4	Donkey Sanctuary	4.8	185	4.5	206
5	Aberfoyle Mill Restaurant	0	0	4.5	232
6	Brae Ridge Alpaca Farm	5	189	0	0
7	Sunset Villa	4.8	69	5	2
8	John Mel Stables	4.9	38	0	0
9	Bee Sweet Nature Co	5	35	5	2

## 4. Interview Summary

The following table recapitulates the responses obtained from stakeholders during the interview engagement process. 13 stakeholders participated in the interviews.

Questions for Informant Interviews
1. Please tell me about your business/role and connection with Tourism in Wellington County.
2. How would you describe the current tourism industry in Wellington County?
<ul style="list-style-type: none"> <li>■ Tourism was dwindling but covid was good for Elora because people weren't traveling abroad and looking locally for opportunities</li> <li>■ Winter has been very slow but this year it is looking even softer than previous years because expectation that people will travel to warmer destinations.</li> <li>■ (2) It is not flashy and does not have a single "gotcha got to go there" - There is not a lot, some farming</li> <li>■ (3) Nature based, the main reason people come to the south end of the County, centre of County is the Elora Gorge - Lakes and camping and boating (Guelph Lake etc) conservation areas are very busy with families from Cities in the area; Hiking trails in the south and connected trails in middle of County – Cataract Trail for example.</li> <li>■ (2) Food experience – Wellington Guide is a strong story – 15 years ago it was vegan/veg – now it is local / farm-to-table / North its food (the Butter tart trail)</li> <li>■ (2) Arts and culture component of tourism / Drayton Theatre</li> <li>■ (2) Festivals and events / Shared festival experience with Guelph – Hillside fest and camping experience</li> </ul>

- (2) Ag Tourism (seasonal) - Strong – agritourism, ag research and conversations, OVC, OAC; conference perspective – visitor profile – high % of VFR, strong showing due to university – Wellington has more of the actual agritourism experiences – opportunity for joint product development and experience development
- (2) Significant cycling tourism in south end of County – two areas who have the most passionate visitors – trail development opportunities
- G2G Rail Trail – Guelph to Goderich Rail Trail
- Guelph is accommodation centre for Wellington County
- Heritage / lots of history
- Growing, becoming very popular
- It has big assets and businesses that draw visitors to the area
- Tourism doesn't get the respect it deserves as an economic driver and community builder, Tourism is an underappreciate tool that attracts investment, new residents to rural communities

### 3. What are the greatest tourism opportunities for Wellington County in the next five years?

#### a. What partnerships could be leveraged to advance these or other opportunities?

#### Opportunities

- (8) Collaboration – Partnerships – Grow Guelph partners, Invest in Guelph, workforce development board, Innovation Guelph (workforce retention and training). Needs to be better connections between BIA, tourism organization, arts centre. / RTO should collaborate with more communities rather than just Elora and Guelph. / More cooperation and collaborations amongst Tourism providers – Specially around Accommodations are needed; they struggle to get 20 rooms in the whole community. / Packages created between the tourism organizations. / Collaborate with residents to see the benefits of tourism rather than competing with tourists. / Identify assets that are attracting visitor and the tour operators that are bringing people in/ Create a workshop for councillors to explain what tourism is and the impact it can have.
- (4) Destination development in villages: Build out offerings and amenities in Fergus / Designate an area in Aberfoyle to turn it into a destination, the whole area is agriculture. There is a lot more people interested in that and farmer's market. / Elora is supposed to feel like a luxury destination. / Strong foundation and stories are already here / Building capacity and really telling the story of agritourism, cycling / Supporting and growing from the ec dev lens, encouraging them to think as themselves as tourism businesses / Don't try and tell the community what to do; uplift them – that's where the strongest collaborations come from / Lovely small-town vibes – elaborate more on, weave it together
- (3) Talking to Grand River Conservation authority to build out more trails. More amenities in general in the area. People are not aware of the recreational opportunities are underutilized. Most are not known and nowhere to park. Not valued and therefore they will not be protected.
- Collective message / marketing - county could be an overarching website or something that could promote the community, and shops organized by interest (naturae, arts, shops,) they are almost a tourist office, they are giving the maps, promoting canoeing, pathways, bike maps.
- Transit: some system to get people through the county, especially in visit time
- Spend time constantly updating TripAdvisor (how about one person on purpose, and intentionally does it)

- Heritage tourism - Interest in genealogy, lots of heritage structures in the County so possible opportunity to create a heritage trail, seeing heritage as part of a transition, an informative and nuanced approach to heritage. Including natural heritage as well as built like the old houses and churches. A contextual driving tour.
- Protect heritage and conservation areas, control people flow and use scheduled visits.
- Capitalize on Elora's popularity to attract visitors to the broader county.
- Use wayfinding to influence visits and people's decisions
- Improve cycling infrastructure.
- There is lack of accommodation but after covid many trailers are for sale from people that bought them during the pandemic. There is opportunity to talk to conservation authorities to develop a program with the trailers.
- WC Tourism sign (possibly across the river from the Elora Mill property. We have an authentic community in Wellington County, excellent lifestyle, a creative environment. Creative culture doesn't have to be artsy - it offers breathing room, no pressure experience
- Elora/Fergus is the 'introduction'/the start of your experience in Wellington County
- There is enough marketing material on the natural assets in the County, those are already know, maybe we could try with new businesses that can attract another group of visitors

#### Risks

- town is small, it is basically built out. Outside of the main town there isn't a lot of great space to walk and stroll. "Potential for the town to feel overrun"
- Lack of funding and collaboration to benefit businesses
- Feels like competing voices instead of a collective effort / There is a current disconnection with the downtown to connect with Arts Centre to really take advantage of that people visiting.

#### 4. What do you see as the top three strengths and weaknesses/challenges of tourism in the County?

##### Strengths

- (3) Authentic, not fabricated / Existing operators – great experiences – how to connect those – sprawl of the County is quite large / Diversity in each community (Fergus for example Scottish; farm experience, Mennonite community); Unique and beauty. / Colour and culture of our rural community / Heritage
- (4) Nature – river, gorge / Conservation areas, trail connections – Ontario By Bike, big draw – will help both – better camping stories / Day tripping from near communities, the media and marketing has been successful; The target market is younger every time, but the experience shown are not so diverse
- (3) Strong tourism & ec dev team at County level – passionate people behind the scenes / Strong tourism group organization and local there are enough key players. Champions who

##### Weaknesses / Challenges

- Lack of accommodation, Airbnb's are a good solution but they disrupts neighbourhoods and contributes to housing shortage
- (2) Very close to capacity during summer season / Residents' concerns about growth – lock the gates
- (4) Need more signage - Need to leverage the Schneider sign at the 401 turn off – this should be a real focus in the future.
- (2) Unique value proposition is a challenge – standing out / Too many great ideas
- (3) Parking is lacking / People don't understand what the gorge is, or the logistics to get there (parking)
- (4) Collaboration and communication, even within the community there is a little internal competition, more promoting and encouraging collaboration. / Disconnected tourism

<p>can help foster new development / Very accountable, credible developers</p> <ul style="list-style-type: none"> <li>▪ (2) Open to regional collaboration - working together attitude – Taste Trail working with City and County – very supportive and excited Ec Dev Department right now – could be more synergy while acknowledging inequities and characteristics / Build from the taste trail to do the same in other interest. Develop the “must see” connected by self-guided</li> <li>▪ Openness to grow; they all want to maintain the small town feeling but they are all focus in growing</li> <li>▪ Arts &amp; Culture hub – people have desire to live here, and figure out what we can do to stay</li> <li>▪ (2) Events and festivals – strong foundation e.g. Spark mentorships, lots of great event ideas, outdoors with larger size needs, RiverFest bus – park full</li> <li>▪ Great variety to attract and serve different groups</li> <li>▪ (2) Agriculture roots and food destination.</li> <li>▪ Good roads</li> </ul>	<p>businesses / Keep momentum in that collaboration. A leader that keeps the energy high/ need a space or body to work together ad offer a solid offer</p> <ul style="list-style-type: none"> <li>▪ Need local tour guides</li> <li>▪ (2) Need maps of the town, trail maps</li> <li>▪ Continued pressures from the Province to diminish the amount of land that the Conservation Authorities hold. So they are falling apart because of lack of investment.</li> <li>▪ RTO4 is unbranded</li> <li>▪ Lack of waterfront story / not on waterfront</li> <li>▪ Guelph is too close to other major cities to pursue large events (e.g., World Juniors) – need to focus on what fits with Guelph</li> <li>▪ How to connect the experiences – transportation</li> <li>▪ Separate governance / communities / authorities</li> <li>▪ Workforce – skilled workers for tourism operators, available – more challenges, lack of university students for hospitality jobs</li> <li>▪ Need to educate citizens how tourism collaboration is important</li> <li>▪ Have challenges with urban growth – sustainable housing / AirBnB has taken up the rental housing for workers</li> <li>▪ Need good, consistent tourism product</li> <li>▪ To be able to foster / nurture outfitters and offer “appropriate” product – look at what we have a create good secondary tourism product</li> </ul> <p>Sidewalks, walkability, pedestrian crossing light</p>
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5. What types of physical (i.e. sewer, water, broadband etc) or soft (i.e. social capacity, services...) infrastructure do you see as being essential to future prosperity of tourism in Wellington County?

- (5) Connectivity - Broadband is slower but there is a new provider coming in in 2023 / Cell reception in Fergus / capability for people to stay connected
- (4) Parking – not enough parking downtown / only 3-hour parking / but a shuttle has been added (from Casino to town)
- (3) Wayfinding strategy – working on it, strong story through signage / signage, information centre, for people that are not searching on internet can get the information (maps, way finding)
- (3) Public toilets - a good part of accidental visitors to some locations are actually people looking for a bathroom / More access to washrooms.
- (4) More cycling infrastructure / More biking support (trails, lock stations).
- Need more hotels – lost one during the pandemic / Strong business case for more rooms



- Bottle filling stations
- Charging stations for EVs
- Volunteer capacity – recruitment sessions, how to recruit, train and retain volunteers, networking mixer – meet and greet with organizations (lots of social media posts among event organizers) – volunteering crisis
- Garbage could be picked up quicker (town is on top of this and increasing garbage collection programs, street cleaners)
- Digital – need to be careful going “too digital” – can lose specific focus areas – have to maintain those print copies
- Tearing up the street to put in new infrastructure
- Don’t know / not aware of rest of County
- These are all taken care of. I don’t think this really affects tourism, like broadband, probably doesn’t affect tourism.
- Provide updated digital information to the tourist. Make easy for them to find the events and tourism businesses. Use a “events near me” approach
- Transportation – we are not connected other than by car.
- Bridges are out along the Grand River – this disrupts the community and tourists.

#### 6. Thinking ahead 5-10 years from now, what do you want the Wellington County tourism sector to be known for?

- (3) Food destination County known as a place with interesting talent (great opportunity for fantastic quality of food, farming is best in Ontario), Wellington could be like “southern hospitality” – feels great to be there, lots going on such as the Gin Trail, farm tours (culinary destination like Prince Edward County),/work to be in the Michelin guide
- (3) more opportunities for adventure tourism (like zip lining and Gorge River trips) or arts or walking, more theatre. / Known for the arts, food / More agritourism experiences – be known as the premier agritourism destination (we have the people and assets)
- Offering diverse experiences drawn more visitors / Appeals to a wide dichotomy of people. All age groups and demographics.
- (4) Authenticity and diverse. Maintain authenticity / small town charm. Authentic experience, and not turn on Niagara on the Lake. Improved the visitor experience, people will come back. Not completely alienate residents.
- (2) Beautiful outdoor destination – people travel to reflect and learn in a new location, meditative, community oriented, returning o the roots, contemplative spaces, “returning home” or returning to self, help people feel that story / We are the green space in between / the gorge (natural environment).
- (2) Strong cycling destination – G2G and waterfront trail Strong future as a daytripping – 2 all-day GO; activity-oriented interest groups (bikers, cyclers,) is there enough infrastructure to serve them?
- (2) Elora – is a luxury destination / The Mill is expanding and maybe now non-guest will have a opportunity to go in. you will go into the bakery
- (2) Marketing campaigns to draw people to the county. / To be very informative about the area because some people don’t know what’s happening there.

- (2) Managed growth / Identify what are the features that are attracting visitors in. / Increase the number of visitors and sharing expertise
- Work more with partners so that the community understand the positive impacts of tourism.
- Expand the environment that is in Elora currently with more spaces for picnics along the river and “seat by a park”
- More Festivals
- Locals are our salesforce (ambassadors) – tourists want to know where locals would go
- Leverage our orbits – tourism activities businesses in the larger region.

7. Is there any specific support that operators could benefit from that you don’t feel they are getting right now?

a. What could tourism partners be doing to help operators more?

- (6) Open dialogue / Unity - Strong relationship between communities / City and County, grow those connections; Look at ourselves as a holistic region / Quarterly touch points – no closely guarded secrets / re frequently, check ins, one-on-one pieces/ More collaboration, and awareness of the RTO4
- (4) Funding support – small denominations: marketing push, business-led approach / Need funds (grant writing and asking for money to keep everything going) that’s the kind of support they need. County Funding to be more effective. / Support from a municipal level (grants, providing resources, or a dedicated person to support tourism) there are many things they are missing because they are stunting their business. / Resources maybe finances, loans, or collaboration.
- (3) County needs its own brand. / Work to increase awareness (signs, brochures, website) / Easy to promote the area / Other players, influencer and connectors that drive and promote the tourism and brand. Not specifically to cafes or shops.
- (3) Education – help people to understand themselves as tourism businesses: workshops and one-pagers “hammering them to death” in a nice way / talk to suppliers, to understand what worked or not, they would like that conversation at municipal and higher level on “how can we help?”/Provide information to operators, especially the smaller ones.
- (2) Wayfinding signage throughout the County. Recent signage is pretty basic with no cache or zest. / Business Directional Signage - The county has reached out and have a program to put signage down the road, he had to pay but appreciate the effort. Years back he tried to get sign a couldn’t and was frustrating, he doesn’t matter about paying for it but getting the qualification and approval was frustrating.
- Share resources, and work together, e.g., “big festivals group” worked together on financing, picnic tables, purchased watercart together. They updated electrical and water to make events better. Promote using local suppliers and networking.
- More transportation connectivity
- Customer service training – like a Superhost training focussed on tourism sector. So recruit people and where are they going to live (do they need to be bussed from somewhere)
- Bring ideas to the table – if we can’t help, maybe we know someone can add
- Take advantage of the fact that we have large markets nearby for tourists and for workforce (Kitchener Waterloo, Guelph)
- Don’t know

8. Are there any other additional insights you would like to provide?

The ECDEV staff is great and this initiative is also great

Replicate or build from the “shop local” initiative, when two county staff helped businesses to have or improve their online presence.

## 5. Asset Mapping and Business Counts

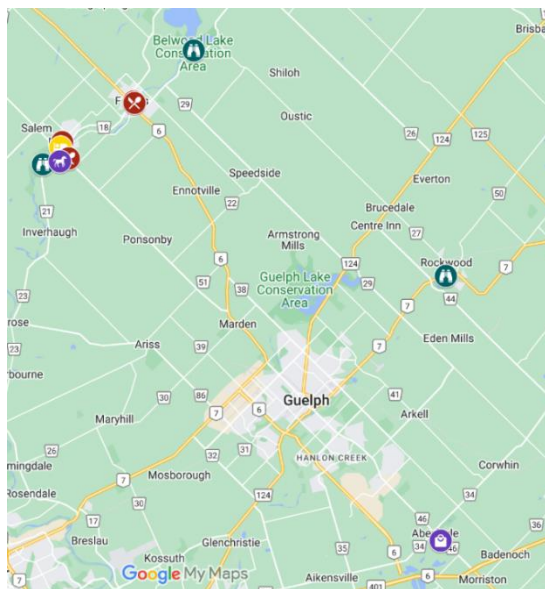
### 5.1 Asset Mapping

#### Major Assets

Tourists were drawn to the area foremost by local natural assets, accounting for 3 of the top 10 assets, restaurants, with 4 of the core assets, 2 attractions and the Elora Mill Hotel and Spa accounts for the primary accommodation asset attracting visitors to the County.

- Rockwood Conservation Area
- Elora Gorge Conservation Area and Lookout
- Elora Brewing Company
- Elora Mill Hotel and Spa
- Belwood Lake Conservation Area
- Gorge Country Kitchen
- Brewhouse On the Grand
- Aberfoyle Antique Market
- The Goofie Newfie
- Grand River Raceway

**Figure 29: Major Asset Wellington County - Part 1:  
(County perspective)**



**Figure 30: Major Asset Wellington County – Part 2  
(Zoom in Elora- Fergus)**



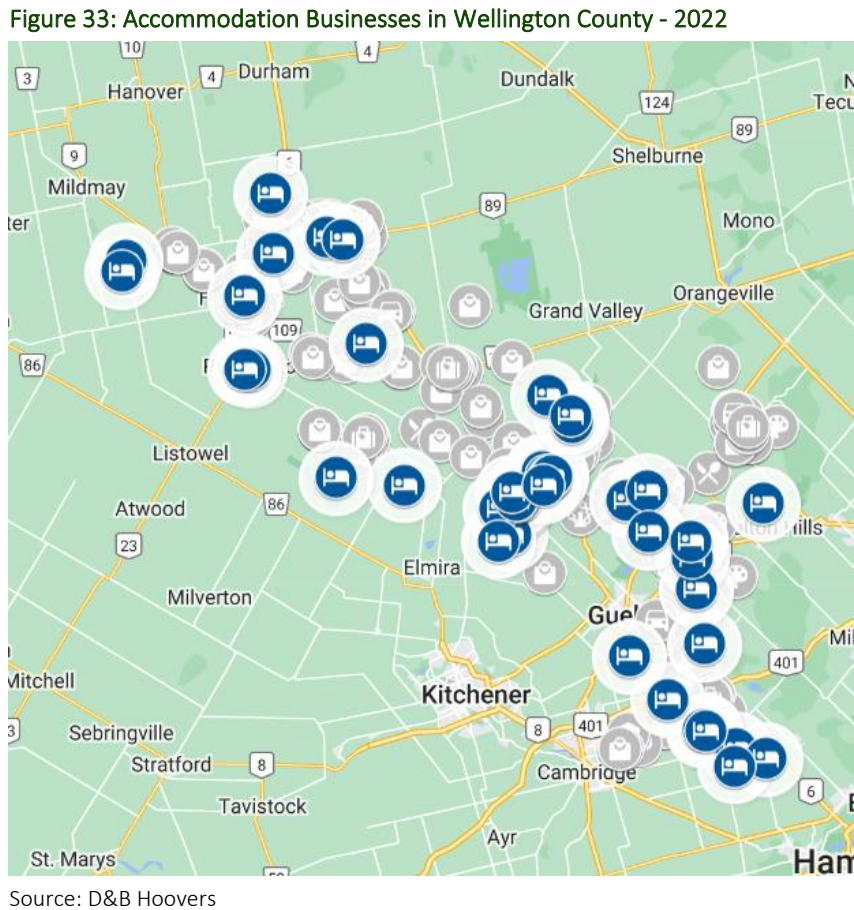
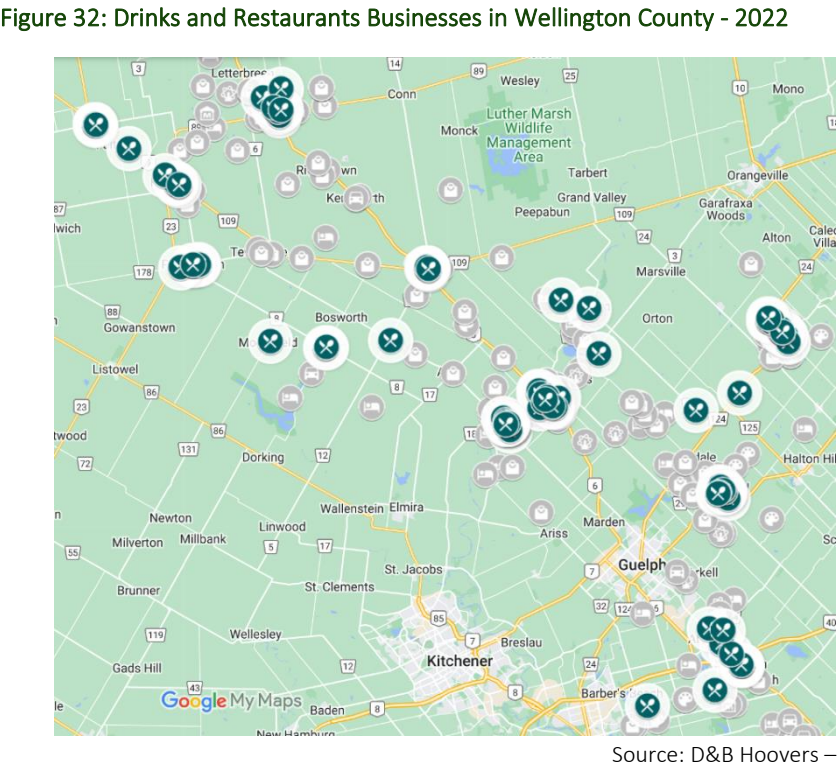
**Emerging Assets:** The following table (Figure 29) displays visitor perceptions of the emerging tourism assets identified in Wellington County, most of which possess a satisfactory online presence with opportunity to improve. The ranking is based on formulas that analyze on ratings and reviews from two online platforms, with extra weight given to listings with both higher rankings and more reviews.

Figure 31: Emerging Assets Wellington County - 2022

	Asset Name	Google Rating	Google Reviews	TripAdvisor Ratings	TripAdvisor reviews	Sort
1	Shepherd's Pub	4.4	696	4	215	911
2	The Cellar Pub and Grill	4.5	606	4	295	901
3	Strom's Farm	4.5	697	4	53	750
4	Tin Roof Cafe	4.8	599	4.5	91	690
5	The Busholme	4.4	634	4	77	711
6	Bissell Park	4.6	629	4	16	645
7	Emerald Lake Trailer Resort and Water Park	4.2	669	4	28	697
8	Highland Pines Campground	4.3	609	3	20	629
9	Elora Quarry Conservation Area	3.7	597	3.5	129	726
10	Judy's Restaurant	4.2	533	3.5	89	622
11	Best Western Plus Fergus Hotel	4.1	297	4.5	253	550
12	Drayton Festival Theatre	4.7	247	5	233	482
13	The Breadalbane Inn	4.3	325	4	213	538
14	The Friendly Society	4.6	436	4.5	51	487
15	Harry Stone's	4.1	475	3.5	53	528
16	Mapleton's Organic Dairy	4.6	434	3	24	458
17	Fergus Tandoori Grill	4.5	298	4	164	462
18	Wellington County Museum and Archives	4.7	370	4.5	55	425
19	Chompin At the Bit Bar and Grille	4.3	350	4	115	465
20	Cafe Creperie	4.1	280	4	191	471
21	Handsome Devil Bistro	4.4	390	4	34	424
22	LaFONTANA	4.3	334	4.5	84	418
23	Donkey Sanctuary	4.8	184	4.5	206	390
24	The Lost and Found Cafe	4.7	334	4.5	50	384
25	Templin Gardens	4.6	376	4.5	2	378
26	Granma Jo's	4.6	352	4	20	372
27	Box Social	4.4	292	4	92	384
28	Heaven on 7	4.4	248	4	127	375
29	The Evelyn	4.5	251	4.5	85	336
30	Holtom's Bakery	4.7	206	4.5	77	283
31	Scozia	4.3	178	4	131	309
32	Elora Mill Restaurant	4.4	259	3.5	39	298
33	The Village Inn Elora	3.6	203	4	125	328
34	Breadalbane Street Bistro	4.4	143	4.5	127	270
35	Maddie Hatter Tea Shop and Café	4.5	165	5	84	249

Source: Deloitte analysis of Google and TripAdvisor ratings and reviews

**Drinks and Restaurants:** A total of 158 businesses of this subsector were found within the County, Fergus (40) and Elora (28) also have the highest concentration on drinks and restaurants with Erin as the community with the third highest concentration (20).



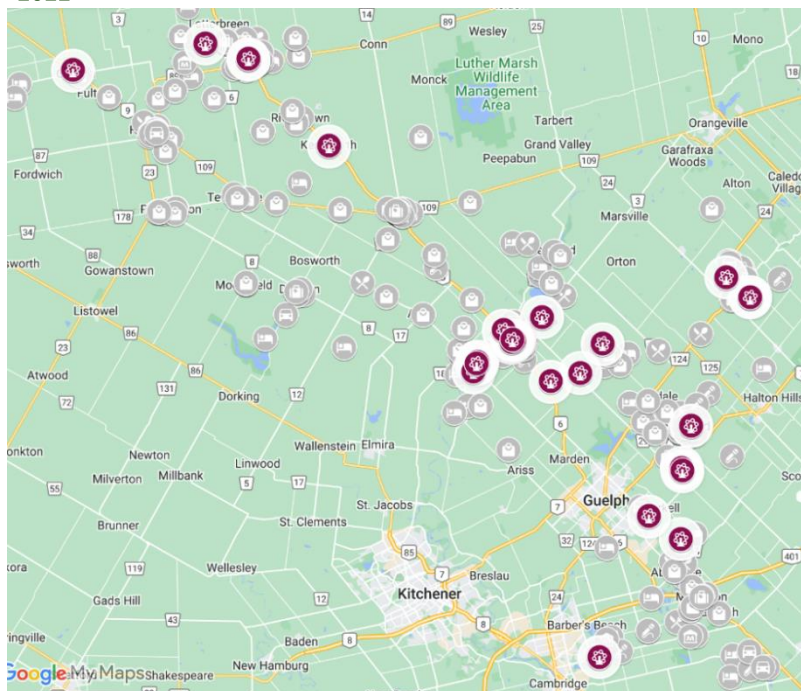
**Accommodation:** Accommodation businesses (53) cover most of the area in the county, including traveler accommodation businesses (hotels, motels and B&Bs) and recreational vehicle (RV) parks and recreational camps. Elora has the highest concentration with 10.



### Amusement and Gambling: 26

Amusement and Gambling businesses were identified in the County with golf courses and bowling centres accounting for 15 of them.

Figure 34: Amusement and Gambling Businesses in Wellington County - 2022

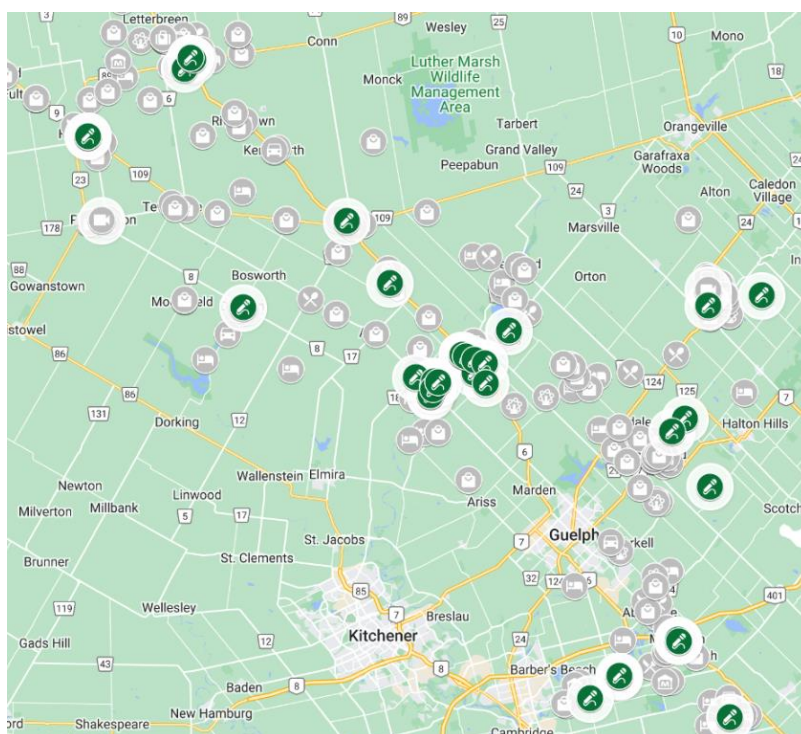


Source: D&B Hoovers

**Arts and Spectator Sports:** A total of 34 arts and spectator sports were identified in the county, with 16 of them belonging to spectator sports and 4 of those located in Puslinch.

Elora is the community with the highest concentration combining the subsectors, accounting for 8 in total, five independent artists, writers, and performer's businesses and three for spectator sports.

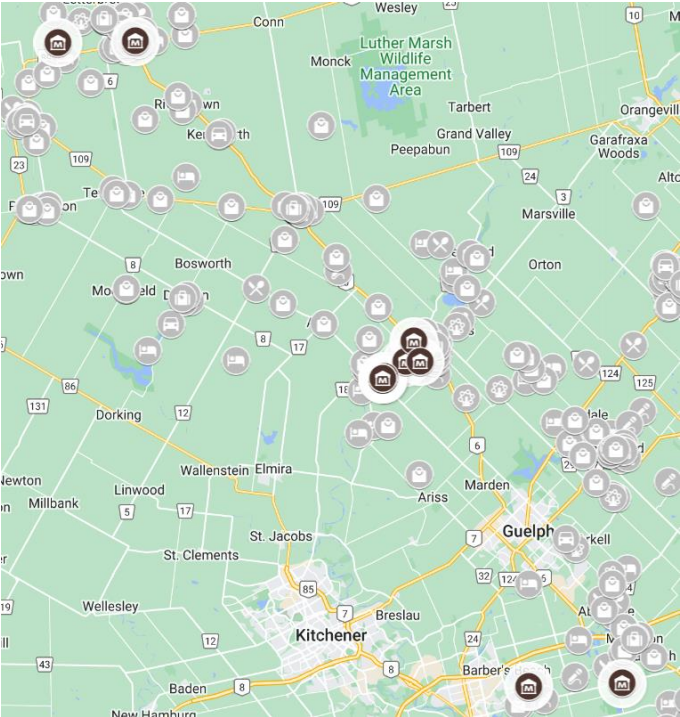
Figure 35: Arts and Spectator Sport Businesses in Wellington County - 2022



Source: D&B Hoovers

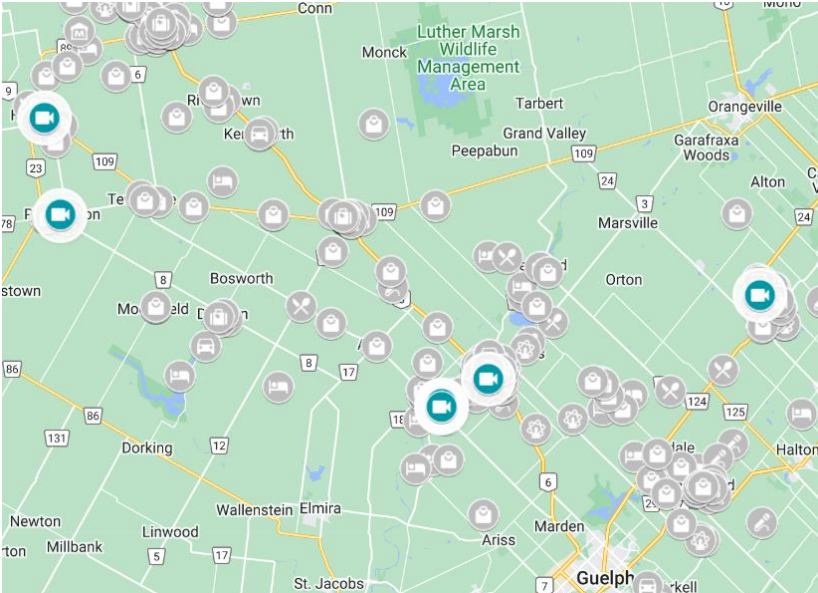
**Heritage Institutions:** Most heritage institutions identified in the County (13) are located in Elora (5), with more businesses located at northern and southern borders of the County.

Figure 36: Heritage Institutions in Wellington County - 2022



Source: D&B Hoovers

Figure 37: Motion Picture and Video in Wellington County - 2022



Source: D&B Hoovers

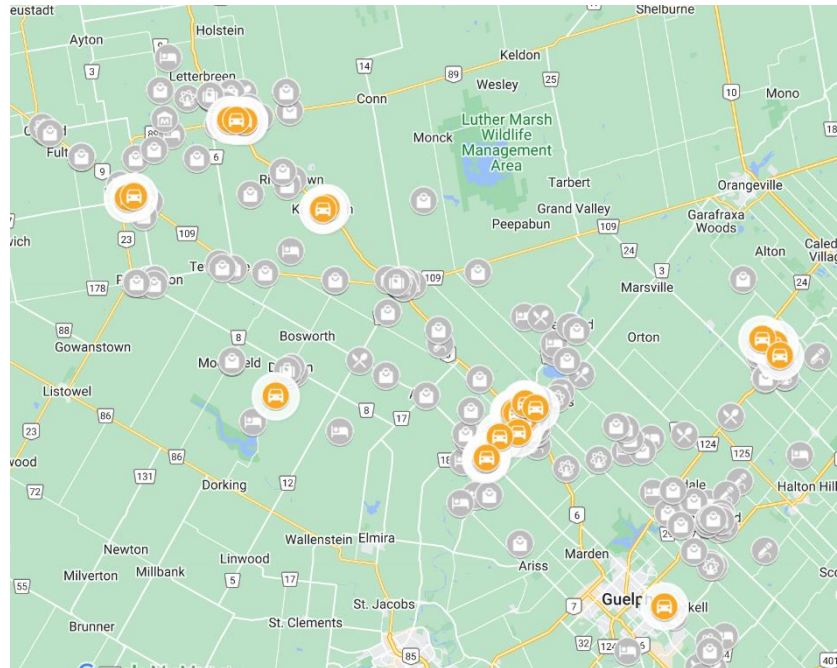
**Motion Picture and Video:** A total of 6 theatres were identified in the county, with 2 of them located in Elora.



**Transportation:** a total of 29

Transportation businesses were found in the County, these include interurban and rural bus transportation; taxi and limousine service; school and employee bus transportation, charter bus industry, other transit and ground passenger transportation, passenger car rental and leasing, truck, utility trailer and RV (recreational vehicle) rental and leasing. Taxi and limousine account for the majority of these businesses (8), with five of them located in Fergus.

**Figure 38: Transportation Businesses in Wellington County - 2022**

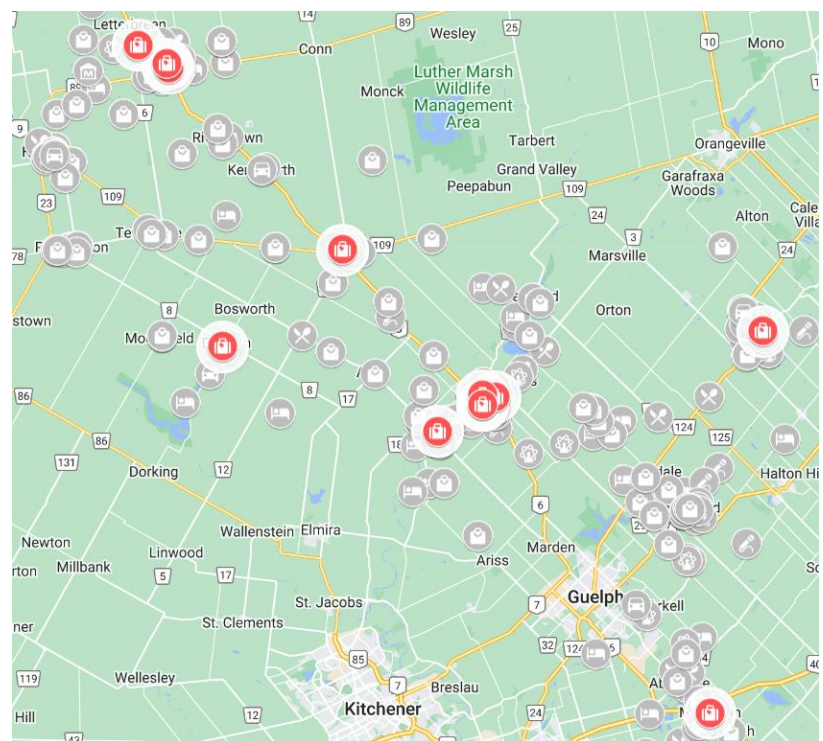


Source: D&B Hoovers

**Travel Arrangement and Reservation**

**Services:** Wellington County has a total of 12 businesses that belong to the travel arrangement and reservation services sector, of those, four are located in Fergus. The remainder of them cover the area with presence in Erin, Arthur, Drayton, Morriston and Mount Forest.

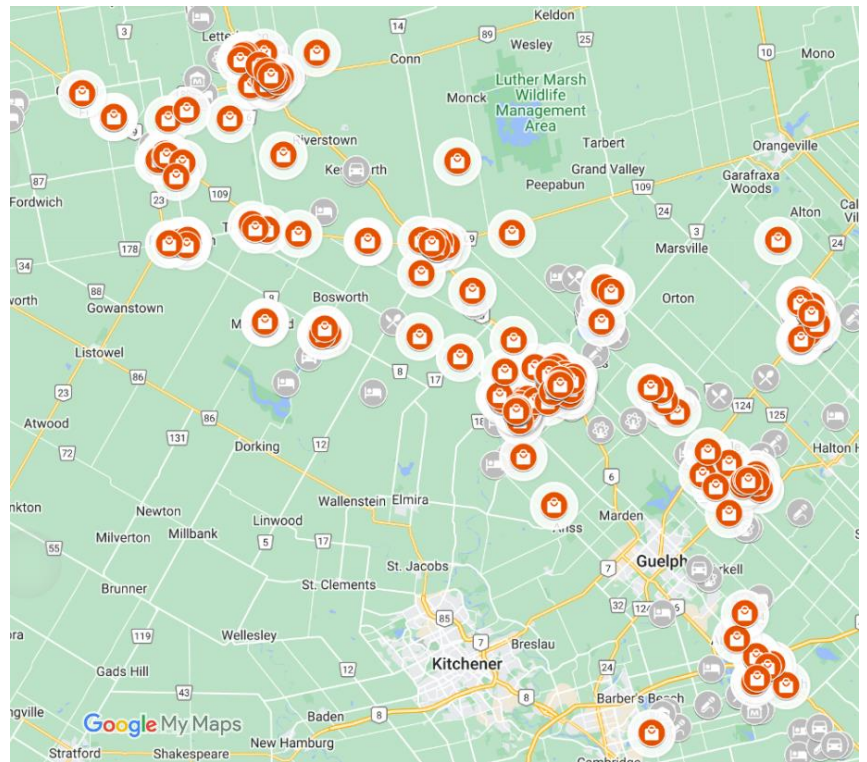
**Figure 39: Transportation Businesses in Wellington County - 2022**



Source: D&B Hoovers

**Tourism Retail:** Tourism retail businesses (326 in total) are spread across the County. There is a higher concentration in Fergus (90) with businesses clustered on St. Andrew Street and Elora (68).

**Figure 40: Retail Tourism Businesses in Wellington County - 2022**



Source: D&B Hoovers

## 5.2 Business Counts

Figure 41: List Drinks and rest Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	The Salon On The Grand	108 St Andrew Street W	Fergus ON	108 St Andrew Street W Fergus ON	Drinks & Restaurants
2	Leslie Public House	216 St Andrew St W	Fergus ON	216 St Andrew St W Fergus ON	Drinks & Restaurants
3	The Fergusson Room	487 St Andrew Street W	Fergus ON	487 St Andrew Street W Fergus ON	Drinks & Restaurants
4	Stone Buildings-Wilsons Egg Emporium Templins Block	216 St Andrew St W	Fergus ON	216 St Andrew St W Fergus ON	Drinks & Restaurants
5	O'Sheas Irish Pub	100 MacQueen Blvd	Fergus ON	100 MacQueen Blvd Fergus ON	Drinks & Restaurants
6	Curwin Pub Inc	148 May St	Rockwood ON	148 May St Rockwood ON	Drinks & Restaurants
7	Gordon's Block Holding Inc	143 Metcalfe St	Elora ON	143 Metcalfe St Elora ON	Drinks & Restaurants
8	2478001 Ontario Ltd.	9603 Sideroad 17	Erin ON	9603 Sideroad 17 Erin ON	Drinks & Restaurants
9	Aberfoyle Mill Limited, The	80 Brock Rd S	Puslinch ON	80 Brock Rd S Puslinch ON	Drinks & Restaurants
10	122164 Canada Limited	10 Fox Run Dr	Puslinch ON	10 Fox Run Dr Puslinch ON	Drinks & Restaurants
11	1205563 Ontario Ltd	82 Wellington Rd 7	Elora ON	82 Wellington Rd 7 Elora ON	Drinks & Restaurants
12	Silly & Brasch Inc	170 St David St S	Fergus ON	170 St David St S Fergus ON	Drinks & Restaurants
13	Recipe Unlimited Corporation	793 Tower St S	Fergus ON	793 Tower St S Fergus ON	Drinks & Restaurants
14	Post Time Pub & Grill	257 George St	Arthur ON	257 George St Arthur ON	Drinks & Restaurants
15	Envers Restaurant	42 Queen St	Morrison ON	42 Queen St Morrison ON	Drinks & Restaurants
16	Judy's Restaurant	124 Grasalgar Rd	Erin ON	124 Grasalgar Rd Erin ON	Drinks & Restaurants
17	Horizon Restaurant Inc	135 St David St N	Fergus ON	135 St David St N Fergus ON	Drinks & Restaurants
18	Priszm Inc.	675 St David St N	Fergus ON	675 St David St N Fergus ON	Drinks & Restaurants



19	A Change of Pace Ltd	34 Queen St Suite 6	Morrison ON	34 Queen St Suite 6 Morrison ON	Drinks & Restaurants
20	Double D.J. Inc	46390 Hwy 109	Clifford ON	46390 Hwy 109 Clifford ON	Drinks & Restaurants
21	John's Pizza Delight	181 St Andrew St E	Fergus ON	181 St Andrew St E Fergus ON	Drinks & Restaurants
22	Underground Kitchen	152 St Andrew St W Unit 1	Fergus ON	152 St Andrew St W Unit 1 Fergus ON	Drinks & Restaurants
23	Bbq Bite	31 Elora St N	Clifford ON	31 Elora St N Clifford ON	Drinks & Restaurants
24	John Cossey Investments Inc	16 Mill St E	Elora ON	16 Mill St E Elora ON	Drinks & Restaurants
25	Grampa Scotts Eatn' Spot Palmerston	185 Main St W	Palmerston ON	185 Main St W Palmerston ON	Drinks & Restaurants
26	Wreckless Eric	90 Metcalfe St	Elora ON	90 Metcalfe St Elora ON	Drinks & Restaurants
27	FOUR SAINTS INVESTMENTS INC	1 Nicholas Beaver Rd	Puslinch ON	1 Nicholas Beaver Rd Puslinch ON	Drinks & Restaurants
28	2553123 Ontario Inc	4 Main St	Erin ON	4 Main St Erin ON	Drinks & Restaurants
29	Clifford Takeout Pizza	29 Elora St N	Clifford ON	29 Elora St N Clifford ON	Drinks & Restaurants
30	Fergus Tandoori Grill	232 St Andrew St W	Fergus ON	232 St Andrew St W Fergus ON	Drinks & Restaurants
31	Tapavino	216 St Andrew Street W	Fergus ON	216 St Andrew Street W Fergus ON	Drinks & Restaurants
32	Moorefield Diner	42 Mcgivern Street	Moorefield ON	42 Mcgivern Street Moorefield ON	Drinks & Restaurants
33	The Lost & Found Café	45 Mill St W Unit 3	Elora ON	45 Mill St W Unit 3 Elora ON	Drinks & Restaurants
34	Union Social Eatery (Mississauga) Inc.	6 Garden Crt Ss 1	Erin ON	6 Garden Crt Ss 1 Erin ON	Drinks & Restaurants
35	Greenley's Restaurant Inc	3 Elora St N	Clifford ON	3 Elora St N Clifford ON	Drinks & Restaurants
36	Maddy Hatter	48 Main St	Erin ON	48 Main St Erin ON	Drinks & Restaurants
37	The Red Caboose	5973 Highway 9 Rr 4	Harriston ON	5973 Highway 9 Rr 4 Harriston ON	Drinks & Restaurants
38	Metcalfe Restaurant	59 Metcalfe St	Elora ON	59 Metcalfe St Elora ON	Drinks & Restaurants
39	MARK MCDONALD	6346 Fifth Line Gd	Fergus ON	6346 Fifth Line Gd Fergus ON	Drinks & Restaurants
40	Tito'S Pizza	122 George Street	Arthur ON	122 George Street Arthur ON	Drinks & Restaurants

41	Fergus Indian Cuisine	232 St Andrew St W	Fergus ON	232 St Andrew St W Fergus ON	Drinks & Restaurants
42	Iscream Cone Company	207 George St	Arthur ON	207 George St Arthur ON	Drinks & Restaurants
43	Goofie Newfie Bar & Restaurant, The	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Drinks & Restaurants
44	Cellar Pub & Grill	13 Mill St E	Elora ON	13 Mill St E Elora ON	Drinks & Restaurants
45	Curry Paradise	140 Metcalfe Street	Elora ON	140 Metcalfe Street Elora ON	Drinks & Restaurants
46	Market Street Caf	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Drinks & Restaurants
47	The Wild Tart	61 Metcalfe Street	Elora ON	61 Metcalfe Street Elora ON	Drinks & Restaurants
48	Bistro Dupain	282 Main Street	Erin ON	282 Main Street Erin ON	Drinks & Restaurants
49	Ctrl Alt Del Coffee	4923 Wellington Road 44 Rr 5	Rockwood ON	4923 Wellington Road 44 Rr 5 Rockwood ON	Drinks & Restaurants
50	Cork Restaurant Inc	146 Metcalfe St	Elora ON	146 Metcalfe St Elora ON	Drinks & Restaurants
51	The Elora Cafe Inc.	175 Geddes St Apartment 1	Elora ON	175 Geddes St Apartment 1 Elora ON	Drinks & Restaurants
52	Delish Kitch	6655 Concession 1	Puslinch ON	6655 Concession 1 Puslinch ON	Drinks & Restaurants
53	Gianni'S Pizza & Wings Restaurant Ltd.	6495 Sideroad 17	Erin ON	6495 Sideroad 17 Erin ON	Drinks & Restaurants
54	Country Style	295 Alma St	Rockwood ON	295 Alma St Rockwood ON	Drinks & Restaurants
55	Pho Erin	77 Main St	Erin ON	77 Main St Erin ON	Drinks & Restaurants
56	Lemongrass Spa	185 Main Street S Suite A	Rockwood ON	185 Main Street S Suite A Rockwood ON	Drinks & Restaurants
57	New Orleans Pizza	94 Elora S	Harriston ON	94 Elora S Harriston ON	Drinks & Restaurants
58	The Friendly Society Elora	8 Mill St W Gd	Elora ON	8 Mill St W Gd Elora ON	Drinks & Restaurants
59	Handsome Devil Bistro	146 Metcalfe St Gd	Elora ON	146 Metcalfe St Gd Elora ON	Drinks & Restaurants
60	2470400 Ontario Inc	148 Main St N	Rockwood ON	148 Main St N Rockwood ON	Drinks & Restaurants
61	Small Town Pizza	135 Main St W	Palmerston ON	135 Main St W Palmerston ON	Drinks & Restaurants
62	Village Pizzeria Erin	67 Main Street	Erin ON	67 Main Street Erin ON	Drinks & Restaurants

63	Bistro Breton	165 Daniel St	Erin ON	165 Daniel St Erin ON	Drinks & Restaurants
64	Palm Garden Restaurant	185 Main St W	Palmerston ON	185 Main St W Palmerston ON	Drinks & Restaurants
65	Baghai Development Limited	2 Thompson Cres	Erin ON	2 Thompson Cres Erin ON	Drinks & Restaurants
66	South 88 Viet Thai Restaurant	77 Main Street	Erin ON	77 Main Street Erin ON	Drinks & Restaurants
67	Dragon Fly Cafe, The	15 Mill St E	Elora ON	15 Mill St E Elora ON	Drinks & Restaurants
68	The Porch Light	Suite 1g 82 Metcalfe St	Elora ON	Suite 1g 82 Metcalfe St Elora ON	Drinks & Restaurants
69	Maxeys	528 Main E	Palmerston ON	528 Main E Palmerston ON	Drinks & Restaurants
70	The Danish Place	7150 Concession 1	Puslinch ON	7150 Concession 1 Puslinch ON	Drinks & Restaurants
71	Rural Spoon Café, The	185 Main Street W	Palmerston ON	185 Main Street W Palmerston ON	Drinks & Restaurants
72	Salad Days Farm	6794 Sixth Line Rr 2	Belwood ON	6794 Sixth Line Rr 2 Belwood ON	Drinks & Restaurants
73	Gente Urban Italian Eatery	180 St Andrew St E	Fergus ON	180 St Andrew St E Fergus ON	Drinks & Restaurants
74	La Fontana	15 Mill St E	Elora ON	15 Mill St E Elora ON	Drinks & Restaurants
75	Scozia Restaurant	487 St Andrew St W	Fergus ON	487 St Andrew St W Fergus ON	Drinks & Restaurants
76	952261ontario Inc	20 Shamrock Rd	Erin ON	20 Shamrock Rd Erin ON	Drinks & Restaurants
77	China 8	840 Tower St S	Fergus ON	840 Tower St S Fergus ON	Drinks & Restaurants
78	Sophie'S Southern Cafe	227 St Andrew Street W	Fergus ON	227 St Andrew Street W Fergus ON	Drinks & Restaurants
79	Remi'S Place	45 Mill St	Elora ON	45 Mill St Elora ON	Drinks & Restaurants
80	Troys' Diner Inc.	4 Water St	Puslinch ON	4 Water St Puslinch ON	Drinks & Restaurants
81	Whistle Stop Variety and Grill	154 Main St	Rockwood ON	154 Main St Rockwood ON	Drinks & Restaurants
82	D J's Donuts & Deli	261 Alma St	Rockwood ON	261 Alma St Rockwood ON	Drinks & Restaurants
83	Rockwood Casual Dining	295 Alma St Unit 2	Rockwood ON	295 Alma St Unit 2 Rockwood ON	Drinks & Restaurants
84	New Orleans Pizza Canada Inc	168 George St	Arthur ON	168 George St Arthur ON	Drinks & Restaurants

85	Subway Sandwiches & Salads	93 Parkside Dr W	Fergus ON	93 Parkside Dr W Fergus ON	Drinks & Restaurants
86	Desert Rose Cafe	130 Metcalfe St	Elora ON	130 Metcalfe St Elora ON	Drinks & Restaurants
87	Ogee's Restaurant	405 Main St	Palmerston ON	405 Main St Palmerston ON	Drinks & Restaurants
88	Express Country Style	5572 Highway 9 Rr 4	Harriston ON	5572 Highway 9 Rr 4 Harriston ON	Drinks & Restaurants
89	Sage Benefit Solutions Inc	296 Geddes St	Elora ON	296 Geddes St Elora ON	Drinks & Restaurants
90	Nook Cafe	187 St Andrew St W	Fergus ON	187 St Andrew St W Fergus ON	Drinks & Restaurants
91	Ikiru Sushi	141 St Andrew St W	Fergus ON	141 St Andrew St W Fergus ON	Drinks & Restaurants
92	Lucky Restaurant	116 Elora S	Harriston ON	116 Elora S Harriston ON	Drinks & Restaurants
93	Great Wall Restaurant	46 Queen St Suite 6	Morrison ON	46 Queen St Suite 6 Morrison ON	Drinks & Restaurants
94	Andy's Food And Restaurant Ltd	820 St David St N	Fergus ON	820 St David St N Fergus ON	Drinks & Restaurants
95	New Orleans Pizza	600 Scotland St	Fergus ON	600 Scotland St Fergus ON	Drinks & Restaurants
96	Box Social Fresh Food Diner And Takeout	103 Geddes St	Elora ON	103 Geddes St Elora ON	Drinks & Restaurants
97	Cafe Creperie Of Elora	40 Mill St W	Elora ON	40 Mill St W Elora ON	Drinks & Restaurants
98	Arthur Food Bank	146 George St	Arthur ON	146 George St Arthur ON	Drinks & Restaurants
99	Mikey's Good Eats	46 Queen St	Morrison ON	46 Queen St Morrison ON	Drinks & Restaurants
100	David's Restaurant	20 Shamrock Rd	Erin ON	20 Shamrock Rd Erin ON	Drinks & Restaurants
101	Brewhouse, The	170 St David St S	Fergus ON	170 St David St S Fergus ON	Drinks & Restaurants
102	Somthin Fishee	16 Mill St E	Elora ON	16 Mill St E Elora ON	Drinks & Restaurants
103	Double D Sports Bar & Grill Inc	120 St Andrew St W	Fergus ON	120 St Andrew St W Fergus ON	Drinks & Restaurants
104	Legge & Associates	144 Parkedge St RR 4	Rockwood ON	144 Parkedge St RR 4 Rockwood ON	Drinks & Restaurants
105	7865066 Canada Inc	14 Mill St E	Elora ON	14 Mill St E Elora ON	Drinks & Restaurants
106	Purple Pig Pizzeria	142 Main St N	Rockwood ON	142 Main St N Rockwood ON	Drinks & Restaurants

107	Visatkrupa Corporation	820 Tower St S	Fergus ON	820 Tower St S Fergus ON	Drinks & Restaurants
108	Sherry's Shack	175 St David St N	Fergus ON	175 St David St N Fergus ON	Drinks & Restaurants
109	Van Gali's Cafe	180 St Andrew St E	Fergus ON	180 St Andrew St E Fergus ON	Drinks & Restaurants
110	Golden Fish & Chips	684 St David St N	Fergus ON	684 St David St N Fergus ON	Drinks & Restaurants
111	Heaven On 7 Bistro Pub	262 Main St S	Rockwood ON	262 Main St S Rockwood ON	Drinks & Restaurants
112	Fisherman's Landing	264 Alma St Unit 1	Rockwood ON	264 Alma St Unit 1 Rockwood ON	Drinks & Restaurants
113	2103903 Ontario Inc	156 Main St	Erin ON	156 Main St Erin ON	Drinks & Restaurants
114	Harvest Table	7635 Wellington Road 7	Alma ON	7635 Wellington Road 7 Alma ON	Drinks & Restaurants
115	Eramosa River Café	262 Main St S	Rockwood ON	262 Main St S Rockwood ON	Drinks & Restaurants
116	Osteria La Cantina	146 Metcalfe St	Elora ON	146 Metcalfe St Elora ON	Drinks & Restaurants
117	Pizza Mamma Mia Ltd	140 Main St	Erin ON	140 Main St Erin ON	Drinks & Restaurants
118	Sunset Villa Association	7150 1 Conc	Puslinch ON	7150 1 Conc Puslinch ON	Drinks & Restaurants
119	Harry Stones Pizza Burger	19 Elora S	Harriston ON	19 Elora S Harriston ON	Drinks & Restaurants
120	Bevin Enterprises Inc.	5 George St	Belwood ON	5 George St Belwood ON	Drinks & Restaurants
121	Jenny's Place	45 Mill St W	Elora ON	45 Mill St W Elora ON	Drinks & Restaurants
122	Punky's	1 Elora N	Harriston ON	1 Elora N Harriston ON	Drinks & Restaurants
123	JJ's Family Dining	747 St Andrew St W	Fergus ON	747 St Andrew St W Fergus ON	Drinks & Restaurants
124	Chat Room Cafe (The)	90 Metcalfe St	Elora ON	90 Metcalfe St Elora ON	Drinks & Restaurants
125	Addis Restaurant	820 St David St N	Fergus ON	820 St David St N Fergus ON	Drinks & Restaurants
126	Bonanza Drive-Inn Ltd	24 Wellington St	Drayton ON	24 Wellington St Drayton ON	Drinks & Restaurants
127	Ashanti Cafe Elora	8 Mill St W	Elora ON	8 Mill St W Elora ON	Drinks & Restaurants
128	Venezia Pizza	9 Main St SS 1 Suite 5	Erin ON	9 Main St SS 1 Suite 5 Erin ON	Drinks & Restaurants

129	Bistro Riviere	82 Main St	Erin ON	82 Main St Erin ON	Drinks & Restaurants
130	Uncle Harry's Fish and Chips Plus	9 Main St Ss 1	Erin ON	9 Main St Ss 1 Erin ON	Drinks & Restaurants
131	Teaberry Café	262 Main St S	Rockwood ON	262 Main St S Rockwood ON	Drinks & Restaurants
132	Au, Chuck Restaurant & Soda Bar Ltd	252 St Andrew St W	Fergus ON	252 St Andrew St W Fergus ON	Drinks & Restaurants
133	Old Copper Kettle, The	216 St Andrew St W	Fergus ON	216 St Andrew St W Fergus ON	Drinks & Restaurants
134	Marlie's Cafe	10 Wellington St N	Drayton ON	10 Wellington St N Drayton ON	Drinks & Restaurants
135	Ladi Pizza Limited	351 St Andrew St W Suite 1	Fergus ON	351 St Andrew St W Suite 1 Fergus ON	Drinks & Restaurants
136	Tang's Restaurant	181 George St	Arthur ON	181 George St Arthur ON	Drinks & Restaurants
137	Bambina's Pizza Place	29 Elora St N	Clifford ON	29 Elora St N Clifford ON	Drinks & Restaurants
138	Riverside Fish & Chips	229 Garafraxa St E	Fergus ON	229 Garafraxa St E Fergus ON	Drinks & Restaurants
139	Pizza Pizza Limited	555 Main St W	Palmerston ON	555 Main St W Palmerston ON	Drinks & Restaurants
140	Pizza Pizza Limited	769 Tower St S	Fergus ON	769 Tower St S Fergus ON	Drinks & Restaurants
141	North River Lounge	120 St Andrew St W	Fergus ON	120 St Andrew St W Fergus ON	Drinks & Restaurants
142	Fiesta Burrito	120 St Andrew St W	Fergus ON	120 St Andrew St W Fergus ON	Drinks & Restaurants
143	2795835 Ontario Inc	9603 Sideroad 17	Erin ON	9603 Sideroad 17 Erin ON	Drinks & Restaurants
144	Spot Restaurant, The	311157 6 Hwy	Mount Forest ON	311157 6 Hwy Mount Forest ON	Drinks & Restaurants
145	Scott's Pizza Burger	286 Main St N	Mount Forest ON	286 Main St N Mount Forest ON	Drinks & Restaurants
146	Forgrand Investments Inc	187 Main St S	Mount Forest ON	187 Main St S Mount Forest ON	Drinks & Restaurants
147	Fishbone Kitchen Bar	302 Wellington Street E	Mount Forest ON	302 Wellington Street E Mount Forest ON	Drinks & Restaurants
148	Eatalian Pizza	392 Main Street N	Mount Forest ON	392 Main Street N Mount Forest ON	Drinks & Restaurants
149	B&A Garden	101 Main Street N	Mount Forest ON	101 Main Street N Mount Forest ON	Drinks & Restaurants
150	The Spot Restaurant	344 James Street	Mount Forest ON	344 James Street Mount Forest ON	Drinks & Restaurants



151	The Sword & Musket	236 Main St N	Mount Forest ON	236 Main St N Mount Forest ON	Drinks & Restaurants
152	Pizza Delight	382 Main St N	Mount Forest ON	382 Main St N Mount Forest ON	Drinks & Restaurants
153	Matteo'S Pizza	103 Main St N	Mount Forest ON	103 Main St N Mount Forest ON	Drinks & Restaurants
154	Kulfi Cafe	212 Main St N	Mount Forest ON	212 Main St N Mount Forest ON	Drinks & Restaurants
155	2363417 Ontario Incorporated	122 Main S	Mount Forest ON	122 Main S Mount Forest ON	Drinks & Restaurants
156	Country Style Barbeque And Ctrng	75 Uncle Tom Cres	Mount Forest ON	75 Uncle Tom Cres Mount Forest ON	Drinks & Restaurants
157	1712298 Ontario Ltd.	399 Main St N	Mount Forest ON	399 Main St N Mount Forest ON	Drinks & Restaurants
158	Harry Stone's Pizza Burge	124 Egremont St S	Mount Forest ON	124 Egremont St S Mount Forest ON	Drinks & Restaurants

Figure 42: List accommodation Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Pike Lake Golf Centre Limited	9625 Pike Lake Rd	Clifford ON	9625 Pike Lake Rd Clifford ON	Accommodation, RV Parks & Rec Camp
2	Elora Mill Limited, The	77 Mill St W	Elora ON	77 Mill St W Elora ON	Accommodation, RV Parks & Rec Camp
3	Breadalbane Inn Ltd	487 St Andrew St W	Fergus ON	487 St Andrew St W Fergus ON	Accommodation, RV Parks & Rec Camp
4	632164 Nb Inc	830 St David St N	Fergus ON	830 St David St N Fergus ON	Accommodation, RV Parks & Rec Camp
5	King Hotel	112 King St	Palmerston ON	112 King St Palmerston ON	Accommodation, RV Parks & Rec Camp
6	Inner Joy Getaways Inc.	7248 Wellington Rd 21	Ariss ON	7248 Wellington Rd 21 Ariss ON	Accommodation, RV Parks & Rec Camp
7	Sharondale (Peel) Inc	7016 Sideroad 18	Drayton ON	7016 Sideroad 18 Drayton ON	Accommodation, RV Parks & Rec Camp
8	Flamboro Valley Camping Resort Ltd	1158 Regional Road 97	Puslinch ON	1158 Regional Road 97 Puslinch ON	Accommodation, RV Parks & Rec Camp
9	Drew House	120 Mill St E	Elora ON	120 Mill St E Elora ON	Accommodation, RV Parks & Rec Camp
10	1659241 Ontario Inc	66 Wellington Rd 7	Elora ON	66 Wellington Rd 7 Elora ON	Accommodation, RV Parks & Rec Camp
11	Jabberwock Guesthouse	12700 5Th Line	Rockwood ON	12700 5Th Line Rockwood ON	Accommodation, RV Parks & Rec Camp

12	1554366 Ontario Inc	820 St David St N	Fergus ON	820 St David St N Fergus ON	Accommodation, RV Parks & Rec Camp
13	Elm Park Motel Inc	Hwy 23 S	Palmerston ON	Hwy 23 S Palmerston ON	Accommodation, RV Parks & Rec Camp
14	The Cheshire Cat B&B	53 Mcnab St E	Elora ON	53 Mcnab St E Elora ON	Accommodation, RV Parks & Rec Camp
15	Winterhill Farm & Garden	5807 Fourth Line Rr 3	Rockwood ON	5807 Fourth Line Rr 3 Rockwood ON	Accommodation, RV Parks & Rec Camp
16	The Meiklejohn House Bed & Breakfast	116 Arthur St E	Harriston ON	116 Arthur St E Harriston ON	Accommodation, RV Parks & Rec Camp
17	Dream Corners Bed & Breakfast	498 St David St N	Fergus ON	498 St David St N Fergus ON	Accommodation, RV Parks & Rec Camp
18	Riverwood Bed & Breakfast	6885 Fifth Line	Belwood ON	6885 Fifth Line Belwood ON	Accommodation, RV Parks & Rec Camp
19	Cedarbrook Farm	812 Concession 8 W	Puslinch ON	812 Concession 8 W Puslinch ON	Accommodation, RV Parks & Rec Camp
20	Gingerbread House Bed & Breakfast	22 Metcalfe St	Elora ON	22 Metcalfe St Elora ON	Accommodation, RV Parks & Rec Camp
21	Secret Garden Tea House Ltd The	61 Metcalfe Street	Elora ON	61 Metcalfe Street Elora ON	Accommodation, RV Parks & Rec Camp
22	Lidia'S Brides B & B	265 St David Street S	Fergus ON	265 St David Street S Fergus ON	Accommodation, RV Parks & Rec Camp
23	St Andrew Suites In Fergus	180 St Andrew Street E	Fergus ON	180 St Andrew Street E Fergus ON	Accommodation, RV Parks & Rec Camp
24	Log Cabin Heaven	7348 Middlebrook Rd	Elora ON	7348 Middlebrook Rd Elora ON	Accommodation, RV Parks & Rec Camp
25	Stonehurst Bed & Breakfast	265 St David St S	Fergus ON	265 St David St S Fergus ON	Accommodation, RV Parks & Rec Camp
26	Old Bissell House, The	84 East Mill Elora ON	Elora ON	84 East Mill Elora ON Elora ON	Accommodation, RV Parks & Rec Camp
27	Dna Reiki B And B	4397 Sideroad 20 N	Puslinch ON	4397 Sideroad 20 N Puslinch ON	Accommodation, RV Parks & Rec Camp
28	Blinkers Bed & Breakfast	53 Victoria St	Elora ON	53 Victoria St Elora ON	Accommodation, RV Parks & Rec Camp
29	Drumlin Farm	4565 Watson Rd S	Puslinch ON	4565 Watson Rd S Puslinch ON	Accommodation, RV Parks & Rec Camp
30	Stoneacre Bed & Breakfast	363 Geddes St	Elora ON	363 Geddes St Elora ON	Accommodation, RV Parks & Rec Camp
31	Grand Retreat Bed & Breakfast	340 St Andrew St E	Fergus ON	340 St Andrew St E Fergus ON	Accommodation, RV Parks & Rec Camp
32	Belwood Lodge & Camp Inc	322 Third St	Belwood ON	322 Third St Belwood ON	Accommodation, RV Parks & Rec Camp
33	Edgewood Camp And Conference Centre	49 Memorial St Ss 1	Eden Mills ON	49 Memorial St Ss 1 Eden Mills ON	Accommodation, RV Parks & Rec Camp

34	Grand River Conservation Authority	161 Falls Street Box 60	Rockwood ON	161 Falls Street Box 60 Rockwood ON	Accommodation, RV Parks & Rec Camp
35	Estonian Summer Camp Society Inc	6338 Eighth Line West	Elora ON	6338 Eighth Line West Elora ON	Accommodation, RV Parks & Rec Camp
36	Catholic Youth Organization	8434 Brebeus	Rockwood ON	8434 Brebeus Rockwood ON	Accommodation, RV Parks & Rec Camp
37	Driftwood Beach Park Limited	90856 Driftwood Beach Rd	Clifford ON	90856 Driftwood Beach Rd Clifford ON	Accommodation, RV Parks & Rec Camp
38	Camp Joshua	5725 6Th Line	Rockwood ON	5725 6Th Line Rockwood ON	Accommodation, RV Parks & Rec Camp
39	Highland Pines Campground (1987) Limited	8523 Wellington Rd 19	Belwood ON	8523 Wellington Rd 19 Belwood ON	Accommodation, RV Parks & Rec Camp
40	Sunset Villa Association	7150 1 Conc	Puslinch ON	7150 1 Conc Puslinch ON	Accommodation, RV Parks & Rec Camp
41	River Bend Park Pioneer Trail Inc	4838 Pioneer Trail	Puslinch ON	4838 Pioneer Trail Puslinch ON	Accommodation, RV Parks & Rec Camp
42	Belwood Camp	739 St Andrew St W	Fergus ON	739 St Andrew St W Fergus ON	Accommodation, RV Parks & Rec Camp
43	Emerald Lake Inc	7248 Gore Rd	Puslinch ON	7248 Gore Rd Puslinch ON	Accommodation, RV Parks & Rec Camp
44	Echo Valley Ranch	7074 Siderd 15 Rr 2	Moorefield ON	7074 Siderd 15 Rr 2 Moorefield ON	Accommodation, RV Parks & Rec Camp
45	Conestoga Family Campground Inc	8772 9 Conc	Moorefield ON	8772 9 Conc Moorefield ON	Accommodation, RV Parks & Rec Camp
46	Conestoga Bible Camp	6791 Leslie Lane Suite 3	Moorefield ON	6791 Leslie Lane Suite 3 Moorefield ON	Accommodation, RV Parks & Rec Camp
47	Maple Grove Resort	1488 Gore Road	Puslinch ON	1488 Gore Road Puslinch ON	Accommodation, RV Parks & Rec Camp
48	Ron's Campsite Inc	170 Lakelet Rd Suite 405	Clifford ON	170 Lakelet Rd Suite 405 Clifford ON	Accommodation, RV Parks & Rec Camp
49	New Country Investors Ltd	1218 Concession 8 W	Puslinch ON	1218 Concession 8 W Puslinch ON	Accommodation, RV Parks & Rec Camp
50	Evergreen Ranch	5487 3Rd Line Rr 3	Rockwood ON	5487 3Rd Line Rr 3 Rockwood ON	Accommodation, RV Parks & Rec Camp
51	Washer's Eden Bed & Breakfast	270 Fergus St N	Mount Forest ON	270 Fergus St N Mount Forest ON	Accommodation, RV Parks & Rec Camp
52	Shamadon Resort Ltd	231764 Concession 2 Rr 4	Mount Forest ON	231764 Concession 2 Rr 4 Mount Forest ON	Accommodation, RV Parks & Rec Camp
54	Carousel Ranch Bed And Breakfast	7174 89 Hwy	Mount Forest ON	7174 89 Hwy Mount Forest ON	Accommodation, RV Parks & Rec Camp

Figure 43: Amusement and Gambling Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Sergeant Majors Laser Tag Arena	380 St Andrew St W	Fergus ON	380 St Andrew St W Fergus ON	Amusement & Gambling
2	Ontario Lottery And Gaming Corporation	7445 Wellington Rd 21	Elora ON	7445 Wellington Rd 21 Elora ON	Amusement & Gambling
3	Calerin Golf Club Inc	9521 10Th Side Rd	Erin ON	9521 10Th Side Rd Erin ON	Amusement & Gambling
4	Fairview Golf & Country Club	GD Lcd Main	Fergus ON	GD Lcd Main Fergus ON	Amusement & Gambling
5	Wildwinds Golf & Country Club	Rr 5	Rockwood ON	Rr 5 Rockwood ON	Amusement & Gambling
6	Victoria Park Valley Golf Club	7660 Maltby Rd E	Puslinch ON	7660 Maltby Rd E Puslinch ON	Amusement & Gambling
7	Wildwinds Golf Links	8136 Wellington Road 22 Rr 5	Rockwood ON	8136 Wellington Road 22 Rr 5 Rockwood ON	Amusement & Gambling
8	Erin Heights Golf & Country Club	5525 Eighth Line	Erin ON	5525 Eighth Line Erin ON	Amusement & Gambling
9	Green-Cuts	5921 5Th Line Rr 1	Rockwood ON	5921 5Th Line Rr 1 Rockwood ON	Amusement & Gambling
10	Golf North Fergus Gc	8243 County Rd 18	Fergus ON	8243 County Rd 18 Fergus ON	Amusement & Gambling
11	Wicked Sticks Family Golf Centre	84 Elora St N	Clifford ON	84 Elora St N Clifford ON	Amusement & Gambling
12	Golf North Calerin Gc	9521 10Th Sideroad	Erin ON	9521 10Th Sideroad Erin ON	Amusement & Gambling
13	Senjan Golf Club	7802 Sixth Line	Elora ON	7802 Sixth Line Elora ON	Amusement & Gambling
14	Victoria Park Golf Club East	1096 Victoria Rd S	Puslinch ON	1096 Victoria Rd S Puslinch ON	Amusement & Gambling
15	Mount Forest Bowling Centre	350 Foster St, Mount Forest, ON	Mount Forest ON	350 Foster St, Mount Forest, ON Mount Forest ON	Amusement & Gambling
16	Webbs Lanes	350 Foster St	Mount Forest ON	350 Foster St Mount Forest ON	Amusement & Gambling
17	Fairbanks Equestrian Trail Rides	62165 Road 63, Mount Forest, ON	Mount Forest ON	62165 Road 63, Mount Forest, ON Mount Forest ON	Amusement & Gambling
18	Karuna Lane Sanctuary And Farm Stay Ltd.	84457 Southgate Road 8 Rr 2	Mount Forest ON	84457 Southgate Road 8 Rr 2 Mount Forest ON	Amusement & Gambling
19	EDEN MILLS WRITERS' FESTIVAL	19 Cedar St, Ss 1	Eden Mills ON	19 Cedar St, Ss 1 Eden Mills ON	Amusement & Gambling

20	THREE CENTURIES FESTIVAL	75 Melville St	Elora ON	75 Melville St Elora ON	Amusement & Gambling
21	Sportsmen's Club Galt Inc, The	6542 Gore Road	Puslinch ON	6542 Gore Road Puslinch ON	Amusement & Gambling
22	Venture Games	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Amusement & Gambling
23	Vilnis Cultural Design Works	44 Edgewood Rd	Eden Mills ON	44 Edgewood Rd Eden Mills ON	Amusement & Gambling
24	Arthur & Area Recreation	7490 Sideroad 7	Kenilworth ON	7490 Sideroad 7 Kenilworth ON	Amusement & Gambling
25	Sensational Elora	9 Mill St E	Elora ON	9 Mill St E Elora ON	Amusement & Gambling
26	Fergus Scottish Festival	181 St Andrew St W Unit 1	Fergus ON	181 St Andrew St W Unit 1 Fergus ON	Amusement & Gambling

Figure 44: List Arts and Sports Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Drayton Festival Theatre Inc, The	33 Wellington St	Drayton ON	33 Wellington St Drayton ON	Arts & Sports
2	The Grey-Wellington Theatre Guild	68 Elora St S	Harriston ON	68 Elora St S Harriston ON	Arts & Sports
3	Dole Tinkers	34 Queen St	Morrison ON	34 Queen St Morrison ON	Arts & Sports
4	Association Canadienne Des Magiciens	216 Elizabeth Crescent	Fergus ON	216 Elizabeth Crescent Fergus ON	Arts & Sports
5	Canadian Association Of Magicians	216 Elizabeth Crescent	Fergus ON	216 Elizabeth Crescent Fergus ON	Arts & Sports
6	Elora Community Theatre	244 St Andrew St W	Fergus ON	244 St Andrew St W Fergus ON	Arts & Sports
7	Warblers Et Al	745 Guelph St	Fergus ON	745 Guelph St Fergus ON	Arts & Sports
8	Woolwich Agricultural Society	7445 Wellington Rd 21	Elora ON	7445 Wellington Rd 21 Elora ON	Arts & Sports
9	Grand River Raceway Corporation	7445 Wellington Rd 21	Elora ON	7445 Wellington Rd 21 Elora ON	Arts & Sports
10	Wallace Standardbreds Inc	6923 Concession 1	Puslinch ON	6923 Concession 1 Puslinch ON	Arts & Sports
11	Angelstone Tournaments Inc	8720 Wellington Rd Suite 50	Rockwood ON	8720 Wellington Rd Suite 50 Rockwood ON	Arts & Sports
12	Classy Lane Stables Ltd	6923 Concession 1	Puslinch ON	6923 Concession 1 Puslinch ON	Arts & Sports

13	Vector Equestrian Inc	995 Concession 8 W	Puslinch ON	995 Concession 8 W Puslinch ON	Arts & Sports
14	Canadian Special Hockey Association	704 Richardson Crt	Fergus ON	704 Richardson Crt Fergus ON	Arts & Sports
15	Slingshot Hockey Inc.	6696 Gore Rd	Puslinch ON	6696 Gore Rd Puslinch ON	Arts & Sports
16	Kingshott, Gary Stables	7 Line	Rockwood ON	7 Line Rockwood ON	Arts & Sports
17	Looking Back Farm	5192 Winston Churchill Blvd	Erin ON	5192 Winston Churchill Blvd Erin ON	Arts & Sports
18	Centre Wellington Ball Hockey Club	7450 Wellington Rd 18	Elora ON	7450 Wellington Rd 18 Elora ON	Arts & Sports
19	Street Soccer Canada	12 Victoria St	Morrison ON	12 Victoria St Morrison ON	Arts & Sports
20	Northwood Stable	7212 Highway 6 Rr 1	Arthur ON	7212 Highway 6 Rr 1 Arthur ON	Arts & Sports
21	Fergus Elora District Soccer Association	160 St David St S	Fergus ON	160 St David St S Fergus ON	Arts & Sports
22	Renaissance Racing	52 Conservation Trail RR 4	Belwood ON	52 Conservation Trail RR 4 Belwood ON	Arts & Sports
23	Fergus Theatre Festival	534 McTavish St	Fergus ON	534 McTavish St Fergus ON	Arts & Sports
24	Great World Artists	13233 5Th Line	Rockwood ON	13233 5Th Line Rockwood ON	Arts & Sports
25	Hanscomb Glass Studio	40 Church St	Elora ON	40 Church St Elora ON	Arts & Sports
26	Norman Stiff Illustration	167 Queen St N	Elora ON	167 Queen St N Elora ON	Arts & Sports
27	Melissamaryjenkinsart	16 Erinwood Dr Rr 2	Erin ON	16 Erinwood Dr Rr 2 Erin ON	Arts & Sports
28	Blown Away Glass Studio	41 Guelph Rd	Elora ON	41 Guelph Rd Elora ON	Arts & Sports
29	The Bridge Studio	59 Victoria St	Elora ON	59 Victoria St Elora ON	Arts & Sports
30	2164435 Ontario Inc	140 Clarke St	Arthur ON	140 Clarke St Arthur ON	Arts & Sports
31	Phil Irish Arts	170 Mill St E	Elora ON	170 Mill St E Elora ON	Arts & Sports
32	Mount Forest & District Sports Complex	850 Princess St	Mount Forest ON	850 Princess St Mount Forest ON	Arts & Sports
33	Motus O Dance Theatre	6880 Siderd 3 W Rr 6	Mount Forest ON	6880 Siderd 3 W Rr 6 Mount Forest ON	Arts & Sports
34	Moose Mountain	257 Main St N	Mount Forest ON	257 Main St N Mount Forest ON	Arts & Sports



Figure 45: List Heritage Institutions in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Corporation Of The County Of Wellington	474 County Rd 18	Fergus ON	474 County Rd 18 Fergus ON	Heritage Institutions
2	CANADIAN HISTORICAL ARMS MUSEUM	6615 Concession 1,, R R #2	Puslinch ON	6615 Concession 1,, R R #2 Puslinch ON	Heritage Institutions
3	Ontario Steam Heritage Museum	7192 Gore Rd	Puslinch ON	7192 Gore Rd Puslinch ON	Heritage Institutions
4	HARRISTON HISTORICAL SOCIETY	Box 638	Harriston ON	Box 638 Harriston ON	Heritage Institutions
5	LittleTree Horticultural Ltd	GD Lcd Main	Fergus ON	GD Lcd Main Fergus ON	Heritage Institutions
6	Elora Centre for the Arts	75 Melville St	Elora ON	75 Melville St Elora ON	Heritage Institutions
7	Carga Gallery in Search of Art	14 Mill St E	Elora ON	14 Mill St E Elora ON	Heritage Institutions
8	Elora Fergus Tourism	10 Mill St E	Elora ON	10 Mill St E Elora ON	Heritage Institutions
9	Stone Threads Fibre Art	640 Colquhoun St	Fergus ON	640 Colquhoun St Fergus ON	Heritage Institutions
10	Studio -Gallery Vernissage... Elora Art Gallery And Studio	78 Metcalfe St	Elora ON	78 Metcalfe St Elora ON	Heritage Institutions
11	WildThings Plant Farm	9688 Base Line Rd	Clifford ON	9688 Base Line Rd Clifford ON	Heritage Institutions
12	Karger Gallery In Search Of Art	14 East Mill St	Elora ON	14 East Mill St Elora ON	Heritage Institutions
13	Mount Forest Museum & Archives	102 Main St S	Mount Forest ON	102 Main St S Mount Forest ON	Heritage Institutions

Figure 46: Motion picture and video exhibition Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	ELORA COMMUNITY THEATRE	P.O. Box 804	Elora ON	P.O. Box 804 Elora ON	Motion picture and video exhibition
2	Erin Theatre	17 Erin Heights Dr, Rr 2	Erin ON	17 Erin Heights Dr, Rr 2 Erin ON	Motion picture and video exhibition

3	Gorge Cinema Ltd, The	43 Mill St W	Elora ON	43 Mill St W Elora ON	Motion picture and video exhibition
4	Fergus Grand Theatre	244 St Andrew St W	Fergus ON	244 St Andrew St W Fergus ON	Motion picture and video exhibition
5	Grey Wellington Theatre Guild	68 Elora St S	Harriston ON	68 Elora St S Harriston ON	Motion picture and video exhibition
6	Norgan Theatre, The	275 Main St W	Palmerston ON	275 Main St W Palmerston ON	Motion picture and video exhibition

Figure 47: Transportation Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Vincent Macmillan Transport Inc	5 Main St	Erin ON	5 Main St Erin ON	Transportation
2	Fergus- Elora Taxi Ltd	825 St George St E	Fergus ON	825 St George St E Fergus ON	Transportation
3	Twins Taxi Ltd	7477 Sideroad 7 Rr 4	Kenilworth ON	7477 Sideroad 7 Rr 4 Kenilworth ON	Transportation
4	2406308 Ontario Inc	718 Woodhill Dr	Fergus ON	718 Woodhill Dr Fergus ON	Transportation
5	Redbeard Rides	170 Arthur St W	Harriston ON	170 Arthur St W Harriston ON	Transportation
6	Green Taxi	275 Gordon Street Suite 4	Fergus ON	275 Gordon Street Suite 4 Fergus ON	Transportation
7	A Discount Car And Truck Rentals	935 St David St N	Fergus ON	935 St David St N Fergus ON	Transportation
8	Mirage Limousine	69 William St	Elora ON	69 William St Elora ON	Transportation
9	Dan's Taxi	222 Garafraxa St E	Fergus ON	222 Garafraxa St E Fergus ON	Transportation
10	Elliott Coach Lines (Fergus) Ltd	680 Glen Garry Cres	Fergus ON	680 Glen Garry Cres Fergus ON	Transportation
11	Brenmar Transit Inc	96 Webb	Harriston ON	96 Webb Harriston ON	Transportation
12	Epoch's Garage Ltd	9128 6 Hwy	Kenilworth ON	9128 6 Hwy Kenilworth ON	Transportation
13	R. Reeves Enterprises	850 St David St N	Fergus ON	850 St David St N Fergus ON	Transportation
14	947465 Ontario Ltd	680 Glengarry Cres	Fergus ON	680 Glengarry Cres Fergus ON	Transportation
15	Cumming Bus Service Ltd	7452 Speers Rd	Elora ON	7452 Speers Rd Elora ON	Transportation

16	Fred Elliott Coach Lines Limited	760 Victoria Rd S	Puslinch ON	760 Victoria Rd S Puslinch ON	Transportation
17	Jsk Services	44 Erindale Dr Ss 1	Erin ON	44 Erindale Dr Ss 1 Erin ON	Transportation
18	Enterprise Rent-A-Car	735 St Andrew St W	Fergus ON	735 St Andrew St W Fergus ON	Transportation
19	New Horizons Car & Truck Rentals Ltd	730 Glengarry Cres	Fergus ON	730 Glengarry Cres Fergus ON	Transportation
20	Riverside Rentals	7011 Wellington Rd 11	Drayton ON	7011 Wellington Rd 11 Drayton ON	Transportation
21	U-Haul Neighborhood Dealer	328 Wellington Rd 18	Elora ON	328 Wellington Rd 18 Elora ON	Transportation
22	Trafalgar Equipment Ltd	963 Regional Road 97 Ss 31	Puslinch ON	963 Regional Road 97 Ss 31 Puslinch ON	Transportation
23	Canadian Fire Trucks Ltd	6458 Wellington Rd 7	Elora ON	6458 Wellington Rd 7 Elora ON	Transportation
24	U-Haul International	4 Shamrock Road	Erin ON	4 Shamrock Road Erin ON	Transportation
25	Xtra Cool Trailer Rentals	856 Concession 8 W	Puslinch ON	856 Concession 8 W Puslinch ON	Transportation
26	Cook's Garage Ltd	380 Main St S Suite 3	Mount Forest ON	380 Main St S Suite 3 Mount Forest ON	Transportation
27	Cook School Bus Lines Ltd	380 Main St S	Mount Forest ON	380 Main St S Mount Forest ON	Transportation
28	Community Taxi & Courier Services	365 Perth St	Mount Forest ON	365 Perth St Mount Forest ON	Transportation
29	Saugeen Mobile Home Sales Service & Rentals	Gd	Mount Forest ON	Gd Mount Forest ON	Transportation

**Figure 48: Travel Arrangements and Reservation Services Businesses in Wellington County- 2022**

No	Company Name	Address	City	Full Address	NAICS
1	C.K. Maggs Adventures	591 Orangeville Rd	Fergus ON	591 Orangeville Rd Fergus ON	Travel Arrangement and Reservation Services
2	Cruise Holidays Of Forest Hill	5408 Wellington Rd 52 Ss 1	Erin ON	5408 Wellington Rd 52 Ss 1 Erin ON	Travel Arrangement and Reservation Services
3	Celtic Dream Shop	170 River Run Rd Rr 2	Drayton ON	170 River Run Rd Rr 2 Drayton ON	Travel Arrangement and Reservation Services
4	Noecker Travel Limited	123 Metcalfe St	Elora ON	123 Metcalfe St Elora ON	Travel Arrangement and Reservation Services
5	Makinaak Paddling	370 Forfar St E	Fergus ON	370 Forfar St E Fergus ON	Travel Arrangement and Reservation Services

6	Ursula's Travel Ltd	245 St Andrew St W	Fergus ON	245 St Andrew St W Fergus ON	Travel Arrangement and Reservation Services
7	Morrison Auto Fab	30 Queen Street	Morrison ON	30 Queen Street Morrison ON	Travel Arrangement and Reservation Services
8	Arthur Travel Service Ltd	170 Smith St	Arthur ON	170 Smith St Arthur ON	Travel Arrangement and Reservation Services
9	Arthur Travel Service Ltd	216 St Andrew St W	Fergus ON	216 St Andrew St W Fergus ON	Travel Arrangement and Reservation Services
10	Fettes Tours & Travel Ltd	184 McFarlin Dr RR 3	Mount Forest ON	184 McFarlin Dr RR 3 Mount Forest ON	Travel Arrangement and Reservation Services
11	Shell	209 Main Street N	Mount Forest ON	209 Main Street N Mount Forest ON	Travel Arrangement and Reservation Services
12	Tina'S Sugar Shoppe	392 Main Street N	Mount Forest ON	392 Main Street N Mount Forest ON	Travel Arrangement and Reservation Services

Figure 49: List Tourism Retail Businesses in Wellington County- 2022

No	Company Name	Address	City	Full Address	NAICS
1	Zehrmart Inc	800 Tower St S	Fergus ON	800 Tower St S Fergus ON	Tourism Retail
2	Marc's Valu-Mart Ltd	134 Main St	Erin ON	134 Main St Erin ON	Tourism Retail
3	Drayton Foodmarket (2011) Ltd	90 Wellington St S	Drayton ON	90 Wellington St S Drayton ON	Tourism Retail
4	L & M Food Market (Ontario) Limited	150 Main W	Palmerston ON	150 Main W Palmerston ON	Tourism Retail
5	Rockwood Food Market Inc	209 Alma St	Rockwood ON	209 Alma St Rockwood ON	Tourism Retail
6	Foodland	165 George St	Arthur ON	165 George St Arthur ON	Tourism Retail
7	Artic Clear (1993) Inc	509 Dickson Dr E	Fergus ON	509 Dickson Dr E Fergus ON	Tourism Retail
8	Dar's Country Market	6458 Wellington Rd 7	Elora ON	6458 Wellington Rd 7 Elora ON	Tourism Retail
9	L & M Food Market (Ontario) Limited	9 Elora St S	Harriston ON	9 Elora St S Harriston ON	Tourism Retail
10	Mac's Convenience Stores Inc	101 St Andrew St E	Fergus ON	101 St Andrew St E Fergus ON	Tourism Retail
11	Beavertails Pastries	63 Metcalfe St	Elora ON	63 Metcalfe St Elora ON	Tourism Retail

12	Mac's Convenience Stores Inc	108 Elora St	Harriston ON	108 Elora St Harriston ON	Tourism Retail
13	Harrcroft Acres Ltd	7764 Nichol Side Rd Suite 5	Fergus ON	7764 Nichol Side Rd Suite 5 Fergus ON	Tourism Retail
14	Brewers Retail Inc	720 St David St N	Fergus ON	720 St David St N Fergus ON	Tourism Retail
15	KM0522 Management Company Ltd	76 Wellington Rd 7	Elora ON	76 Wellington Rd 7 Elora ON	Tourism Retail
16	Charjays West Indian Grocery Inc.	15 Dover Lane	Fergus ON	15 Dover Lane Fergus ON	Tourism Retail
17	8394261 Canada Inc	8006 Wellington Rd Suite 109	Arthur ON	8006 Wellington Rd Suite 109 Arthur ON	Tourism Retail
18	2333395 Ontario Incorporated	745 St Andrew St W	Fergus ON	745 St Andrew St W Fergus ON	Tourism Retail
19	1452591 Ontario Ltd	9 Main St Suite 2	Erin ON	9 Main St Suite 2 Erin ON	Tourism Retail
20	Liquor Control Board of Ontario, The	490 St Andrew St W	Fergus ON	490 St Andrew St W Fergus ON	Tourism Retail
21	Fergus Scottish Corner Shop Ltd	181 St Andrew St E	Fergus ON	181 St Andrew St E Fergus ON	Tourism Retail
22	LCBO Fergus	97 Parkside Dr W	Fergus ON	97 Parkside Dr W Fergus ON	Tourism Retail
23	Liquor Control Board of Ontario, The	2 Queen St S	Harriston ON	2 Queen St S Harriston ON	Tourism Retail
24	Liquor Control Board of Ontario, The	440 Main St W	Palmerston ON	440 Main St W Palmerston ON	Tourism Retail
25	M & M Meat Shops	774 Tower St S	Fergus ON	774 Tower St S Fergus ON	Tourism Retail
26	Meroon Market	2 George St Suite 197 1/2	Arthur ON	2 George St Suite 197 1/2 Arthur ON	Tourism Retail
27	The Liquor Control Board of Ontario	151 Catharine W	Arthur ON	151 Catharine W Arthur ON	Tourism Retail
28	953464 Ontario Ltd	34 Queen St	Morrison ON	34 Queen St Morrison ON	Tourism Retail
29	Village Variety Ontario Ltd	124 George St	Arthur ON	124 George St Arthur ON	Tourism Retail
30	Daferner's European Meat & Delicatessens	9 Main St Ss 1	Erin ON	9 Main St Ss 1 Erin ON	Tourism Retail
31	Thatcher Farms	5727 5Th Line Rr 1	Rockwood ON	5727 5Th Line Rr 1 Rockwood ON	Tourism Retail
32	Daddy'S Butcher Shop	168 St Andrew St W	Fergus ON	168 St Andrew St W Fergus ON	Tourism Retail
33	Foodland Rockwood 6836	203 Alma Street	Rockwood ON	203 Alma Street Rockwood ON	Tourism Retail

34	Elora Farmers Market	75 Melville St	Elora ON	75 Melville St Elora ON	Tourism Retail
35	Neighbourhood Variety	166 Forfar St E	Fergus ON	166 Forfar St E Fergus ON	Tourism Retail
36	Aasdel Foods Corp	875 St David Street N	Fergus ON	875 St David Street N Fergus ON	Tourism Retail
37	Roesink Dairy Ltd.	7432 Wellington Road 7	Alma ON	7432 Wellington Road 7 Alma ON	Tourism Retail
38	U-Mac Corporation, The	30 Bonniewood Dr	Drayton ON	30 Bonniewood Dr Drayton ON	Tourism Retail
39	Alma Town Convenience	3 Peel St W	Alma ON	3 Peel St W Alma ON	Tourism Retail
40	Scoop-It Bulk & Frozen Food	30 Elora St	Harriston ON	30 Elora St Harriston ON	Tourism Retail
41	Dale G. Bannister	230 Carrol St	Arthur ON	230 Carrol St Arthur ON	Tourism Retail
42	Erin Food Mart	58 Main St	Erin ON	58 Main St Erin ON	Tourism Retail
43	Dekker Dairy	6798 Wellington Rd 109 Rr 1	Palmerston ON	6798 Wellington Rd 109 Rr 1 Palmerston ON	Tourism Retail
44	Hasty Market	600 Scotland St	Fergus ON	600 Scotland St Fergus ON	Tourism Retail
45	Walk in the Park	59 Beirnes Crt	Fergus ON	59 Beirnes Crt Fergus ON	Tourism Retail
46	Quick N Pick Convenience	140 Main St	Erin ON	140 Main St Erin ON	Tourism Retail
47	Foodland - Palmerston	150 Main St E	Palmerston ON	150 Main St E Palmerston ON	Tourism Retail
48	Sweet Distractions	16 Mill St W	Elora ON	16 Mill St W Elora ON	Tourism Retail
49	Freshco St. David & Gordon	875 St David Street N	Fergus ON	875 St David Street N Fergus ON	Tourism Retail
50	Ch Convenience Store	860 Tower St S	Fergus ON	860 Tower St S Fergus ON	Tourism Retail
51	Raw Elements Inc.	8473 Wellington Road 50 Rr 4	Rockwood ON	8473 Wellington Road 50 Rr 4 Rockwood ON	Tourism Retail
52	Tandoori Table	600 Scotland St	Fergus ON	600 Scotland St Fergus ON	Tourism Retail
53	A J. Mac Enterprises	95 York St E	Elora ON	95 York St E Elora ON	Tourism Retail
54	465708 Ontario Inc	143 Arthur St	Harriston ON	143 Arthur St Harriston ON	Tourism Retail
55	Erin Convenience Dol	140 Main Street	Erin ON	140 Main Street Erin ON	Tourism Retail



56	Market Pantry	54 Wellington Rd 7	Elora ON	54 Wellington Rd 7 Elora ON	Tourism Retail
57	Teb'S Convenience	38 Mcgivern Street	Moorefield ON	38 Mcgivern Street Moorefield ON	Tourism Retail
58	Rivers Edge Goat	8102 Wellington Road 109 Rr 3	Arthur ON	8102 Wellington Road 109 Rr 3 Arthur ON	Tourism Retail
59	Homestyle Flavours	6721 Wellington Rd 109	Palmerston ON	6721 Wellington Rd 109 Palmerston ON	Tourism Retail
60	Cedarwood Honey	6105 Twelfth Line Rr 1	Harriston ON	6105 Twelfth Line Rr 1 Harriston ON	Tourism Retail
61	Fergus Market	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Tourism Retail
62	Huber Farms Heritage Meats	9601 2 Concession Rr 2	Kenilworth ON	9601 2 Concession Rr 2 Kenilworth ON	Tourism Retail
63	Spice Jar, The	93 Woolwich St W	Elora ON	93 Woolwich St W Elora ON	Tourism Retail
64	Express Convenience & Palmerston Video	405 Main St E	Palmerston ON	405 Main St E Palmerston ON	Tourism Retail
65	Hilltop Variety	58 Wellington Dr Unit 4	Elora ON	58 Wellington Dr Unit 4 Elora ON	Tourism Retail
66	Harriston Convenience Store	26 Elora S	Harriston ON	26 Elora S Harriston ON	Tourism Retail
67	Murison Farms Ltd	5251 County Rd 27	Rockwood ON	5251 County Rd 27 Rockwood ON	Tourism Retail
68	Sunny Convenience	89 Wellington St S Unit 3	Drayton ON	89 Wellington St S Unit 3 Drayton ON	Tourism Retail
69	Ricos Fruit Market	9483 Wellington Rd 124	Erin ON	9483 Wellington Rd 124 Erin ON	Tourism Retail
70	1500994 Ontario Inc	820 St David St N	Fergus ON	820 St David St N Fergus ON	Tourism Retail
71	Bellwood Country Market	6 George St	Belwood ON	6 George St Belwood ON	Tourism Retail
72	Grand Wines	920 St David St N	Fergus ON	920 St David St N Fergus ON	Tourism Retail
73	Butt's Berry Farm	5838 5Th Line Rr 1	Rockwood ON	5838 5Th Line Rr 1 Rockwood ON	Tourism Retail
74	Daisy Mart	12 Wellington S	Drayton ON	12 Wellington S Drayton ON	Tourism Retail
75	Sobeys Capital Incorporated	753 St Andrew St W	Fergus ON	753 St Andrew St W Fergus ON	Tourism Retail
76	Wellington Poultry Ltd	7514 Wellington Road 109	Arthur ON	7514 Wellington Road 109 Arthur ON	Tourism Retail
77	Fraberts Fresh Food Ltd	105 Queen St W Suite 3	Fergus ON	105 Queen St W Suite 3 Fergus ON	Tourism Retail

78	Aquarius Water Treatment	195 Geddes St Suite 846	Elora ON	195 Geddes St Suite 846 Elora ON	Tourism Retail
79	Wilkin, Ron Jewellers Limited	109 St Andrew St W	Fergus ON	109 St Andrew St W Fergus ON	Tourism Retail
80	Kinetics Retailing Systems Limited	Rr 5	Rockwood ON	Rr 5 Rockwood ON	Tourism Retail
81	Broderick, T. Clothing Limited	257 St Andrew St W	Fergus ON	257 St Andrew St W Fergus ON	Tourism Retail
82	969618 Ontario Inc	116 Main St	Erin ON	116 Main St Erin ON	Tourism Retail
83	Warehouse One Clothing Ltd	120 MacQueen Blvd	Fergus ON	120 MacQueen Blvd Fergus ON	Tourism Retail
84	Sussman's Of Arthur Ltd	101 Schmidt Dr	Arthur ON	101 Schmidt Dr Arthur ON	Tourism Retail
85	Broderick, T. Clothing Limited	265 St Andrew St W	Fergus ON	265 St Andrew St W Fergus ON	Tourism Retail
86	Shoetopia Footwear Inc	860 Tower St S Unit 1	Fergus ON	860 Tower St S Unit 1 Fergus ON	Tourism Retail
87	Naomi's	60 Mill St W	Elora ON	60 Mill St W Elora ON	Tourism Retail
88	Sensimillia Apparel Inc.	Suite 668 160 Main St	Erin ON	Suite 668 160 Main St Erin ON	Tourism Retail
89	Grand River Garment Co Inc	51 Mill St W	Elora ON	51 Mill St W Elora ON	Tourism Retail
90	Aria Boutique	45 Mill St W	Elora ON	45 Mill St W Elora ON	Tourism Retail
91	Lemon & Limestone Boutique	75 Metcalfe St	Elora ON	75 Metcalfe St Elora ON	Tourism Retail
92	Rigid Installations Limited	7007 Wellington Rd 109 Rr 1	Moorefield ON	7007 Wellington Rd 109 Rr 1 Moorefield ON	Tourism Retail
93	Rieker Shoe Centre	50 Mill St W	Elora ON	50 Mill St W Elora ON	Tourism Retail
94	Struck Apparel Incorporated	101 Guelph St	Rockwood ON	101 Guelph St Rockwood ON	Tourism Retail
95	Grand Bark Pet Boutique	45 Mill St W Unit 4	Elora ON	45 Mill St W Unit 4 Elora ON	Tourism Retail
96	Joanne Chambers	9551 Road 3 N	Harriston ON	9551 Road 3 N Harriston ON	Tourism Retail
97	Gilded Cage	224 Harris St Rr 1	Rockwood ON	224 Harris St Rr 1 Rockwood ON	Tourism Retail
98	Paradise Farms Prime Beef Bistro Erin	2 Thompson Cres Ss 1	Erin ON	2 Thompson Cres Ss 1 Erin ON	Tourism Retail
99	Re:Treat	69 Metcalfe St	Elora ON	69 Metcalfe St Elora ON	Tourism Retail

100	Unique Fashions Boutique 'N Treasures Inc.	6 Elora Street	Harriston ON	6 Elora Street Harriston ON	Tourism Retail
101	Bill Fashions	115 Geddes St	Elora ON	115 Geddes St Elora ON	Tourism Retail
102	Bentley House Fine Teas And Tea Room	240 St Andrew St W	Fergus ON	240 St Andrew St W Fergus ON	Tourism Retail
103	Hannah's	74 Main St	Erin ON	74 Main St Erin ON	Tourism Retail
104	Steve's Sheepskin & Leather Shop Inc	50 Mill St W	Elora ON	50 Mill St W Elora ON	Tourism Retail
105	Special Effects	195 St Andrew St W	Fergus ON	195 St Andrew St W Fergus ON	Tourism Retail
106	Epiphany Apparel	36 Mill St W	Elora ON	36 Mill St W Elora ON	Tourism Retail
107	Exclusively Horses	8287 Line 6	Kenilworth ON	8287 Line 6 Kenilworth ON	Tourism Retail
108	Black Dog Designs	139 Scots Lane Rr 2	Rockwood ON	139 Scots Lane Rr 2 Rockwood ON	Tourism Retail
109	Thewooshop	6522 Gore Road	Puslinch ON	6522 Gore Road Puslinch ON	Tourism Retail
110	Marvin Martin	5898 6Th Line E	Ariss ON	5898 6Th Line E Ariss ON	Tourism Retail
111	Craftime Clockery Inc	7515 Wellington Road 109 Rr 4	Arthur ON	7515 Wellington Road 109 Rr 4 Arthur ON	Tourism Retail
112	Ron Wilkin Jewellers	48 Mill St W Gd	Elora ON	48 Mill St W Gd Elora ON	Tourism Retail
113	Kaspar Environmental	41 Patrick Blvd	Elora ON	41 Patrick Blvd Elora ON	Tourism Retail
114	Twisted T'S	470 Wellington Rd 7	Elora ON	470 Wellington Rd 7 Elora ON	Tourism Retail
115	Truform Jewelry	6 Allan Dr Rr 5	Belwood ON	6 Allan Dr Rr 5 Belwood ON	Tourism Retail
116	Epiphany Apparel Erin	60 Main St	Erin ON	60 Main St Erin ON	Tourism Retail
117	Fear's Bibs 'n' Cribs Ltd	45 McGivern St	Moorefield ON	45 McGivern St Moorefield ON	Tourism Retail
118	Tms Graphics	156 Coker Cres Rr 2	Rockwood ON	156 Coker Cres Rr 2 Rockwood ON	Tourism Retail
119	Sew What Sewing Company	204 St Andrew St W	Fergus ON	204 St Andrew St W Fergus ON	Tourism Retail
120	Glasses & Grapes	6256 4Th Line E	Ariss ON	6256 4Th Line E Ariss ON	Tourism Retail
121	The Scrub Room	351 St Andrew Street W	Fergus ON	351 St Andrew Street W Fergus ON	Tourism Retail

122	Silverfish Studios Jewellery	15 Grandview Ave	Fergus ON	15 Grandview Ave Fergus ON	Tourism Retail
123	Shoe Villa	54 Wellington Rd 7	Elora ON	54 Wellington Rd 7 Elora ON	Tourism Retail
124	Lisas Gems And Watches	5 Erinlea Cres Ss 1	Erin ON	5 Erinlea Cres Ss 1 Erin ON	Tourism Retail
125	M&M Powersports	185 Hayward Court Rr 4	Rockwood ON	185 Hayward Court Rr 4 Rockwood ON	Tourism Retail
126	Epiohany	60 Main Street	Erin ON	60 Main Street Erin ON	Tourism Retail
127	Dr John Hennessey D V M	8427 Wellington Road 22 Rr 1	Rockwood ON	8427 Wellington Road 22 Rr 1 Rockwood ON	Tourism Retail
128	Carla's Fine Jewellery	48 David St E	Elora ON	48 David St E Elora ON	Tourism Retail
129	Premium Promoworx Inc	157 St David Street N	Fergus ON	157 St David Street N Fergus ON	Tourism Retail
130	DesignHer	82 Metcalfe St	Elora ON	82 Metcalfe St Elora ON	Tourism Retail
131	Moretti's For Men	169 St Andrew St W	Fergus ON	169 St Andrew St W Fergus ON	Tourism Retail
132	Peared Children's Boutique	153 Geddes St	Elora ON	153 Geddes St Elora ON	Tourism Retail
133	Macadi Jewellery	54 Victoria St	Elora ON	54 Victoria St Elora ON	Tourism Retail
134	Freeman Formalwear Limited	143 George St	Arthur ON	143 George St Arthur ON	Tourism Retail
135	Handbaggs Plus	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Tourism Retail
136	Mark's Work Wearhouse Ltd	900 Tower Street S	Fergus ON	900 Tower Street S Fergus ON	Tourism Retail
137	Pepe & Maureen Ltd	16 Mill St W	Elora ON	16 Mill St W Elora ON	Tourism Retail
138	Yarn Bird	22 Mill St W	Elora ON	22 Mill St W Elora ON	Tourism Retail
139	Bosman Home Front Inc	6770 Wellington Rd 109	Palmerston ON	6770 Wellington Rd 109 Palmerston ON	Tourism Retail
140	Styll Fine Craft Gallery	5 Mill St E	Elora ON	5 Mill St E Elora ON	Tourism Retail
141	Grand River Running Inc	105 Queen St W Unit 6	Fergus ON	105 Queen St W Unit 6 Fergus ON	Tourism Retail
142	Caplan, Philip Sales Inc	17 Settlers Crt	Morrison ON	17 Settlers Crt Morrison ON	Tourism Retail
143	Bottom Line Bookkeeping + Business Services	7297 Calfass Rd	Puslinch ON	7297 Calfass Rd Puslinch ON	Tourism Retail

144	Stryders Sports	125 St Andrew St W	Fergus ON	125 St Andrew St W Fergus ON	Tourism Retail
145	Doll House Elora	151 Isabella St	Arthur ON	151 Isabella St Arthur ON	Tourism Retail
146	Control The 'T' Sports	573 Walker St	Fergus ON	573 Walker St Fergus ON	Tourism Retail
147	Tw Cycles & Power Sports Inc.	941 Kelsowood Lane	Fergus ON	941 Kelsowood Lane Fergus ON	Tourism Retail
148	Dead Man Discs	936 Gzowski Street	Fergus ON	936 Gzowski Street Fergus ON	Tourism Retail
149	Salem Cyclery	320 Erb St	Elora ON	320 Erb St Elora ON	Tourism Retail
150	Green Bicycle Farm	5329 3Rd Line Rr 3	Rockwood ON	5329 3Rd Line Rr 3 Rockwood ON	Tourism Retail
151	Teenie Tiny Tots Children's Shop	246 Main E	Palmerston ON	246 Main E Palmerston ON	Tourism Retail
152	Forks Bicycle Shop	72 Main	Erin ON	72 Main Erin ON	Tourism Retail
153	It's Delights Inc	64 Main St	Erin ON	64 Main St Erin ON	Tourism Retail
154	Badenoch Archery	15 Badenoch St E	Morriston ON	15 Badenoch St E Morriston ON	Tourism Retail
155	Bum Chums	161 Mary St	Elora ON	161 Mary St Elora ON	Tourism Retail
156	Bicycle Tailor, The	170 St Andrew St E	Fergus ON	170 St Andrew St E Fergus ON	Tourism Retail
157	County Services Co	4063 Highway 6	Puslinch ON	4063 Highway 6 Puslinch ON	Tourism Retail
158	Jolleys Farm Toys	7808 Sideroad 9 E Rr 1	Arthur ON	7808 Sideroad 9 E Rr 1 Arthur ON	Tourism Retail
159	E J Wesley Pottery And Ceramics	120 Main S Suite A	Rockwood ON	120 Main S Suite A Rockwood ON	Tourism Retail
160	Prodigy Piano Inc.	186 Brady Street Rr 1	Rockwood ON	186 Brady Street Rr 1 Rockwood ON	Tourism Retail
161	Magic Pebble Children'S Books	56 Mill Street W Gd	Elora ON	56 Mill Street W Gd Elora ON	Tourism Retail
162	Country Plus	30 Geddes St	Elora ON	30 Geddes St Elora ON	Tourism Retail
163	Cole Carpentry	552 Colquhoun St	Fergus ON	552 Colquhoun St Fergus ON	Tourism Retail
164	Locke, Dave Sports	8139 Indian Trail	Rockwood ON	8139 Indian Trail Rockwood ON	Tourism Retail
165	Jollywood Elora Ltd	3 Garlan St	Elora ON	3 Garlan St Elora ON	Tourism Retail

166	Olde Tyme Country Crafts & Std	67 Main St	Erin ON	67 Main St Erin ON	Tourism Retail
167	Bookery, The	191 St Andrew St W	Fergus ON	191 St Andrew St W Fergus ON	Tourism Retail
168	Acoustic Traditions Music & Hemp Products	209 St Andrew St W	Fergus ON	209 St Andrew St W Fergus ON	Tourism Retail
169	Maint - Syn	7515 Wellington Rd 36	Morrison ON	7515 Wellington Rd 36 Morrison ON	Tourism Retail
170	Splinter Books	490 Garafraxa St E	Fergus ON	490 Garafraxa St E Fergus ON	Tourism Retail
171	String Theory Yarn Shop	152 St Andrew Street W	Fergus ON	152 St Andrew Street W Fergus ON	Tourism Retail
172	Grand River Troutfitters Ltd	105 Queen St W Suite 9	Fergus ON	105 Queen St W Suite 9 Fergus ON	Tourism Retail
173	Music In The Wood Midnight Special Enterprises	122 Main Street S	Rockwood ON	122 Main Street S Rockwood ON	Tourism Retail
174	Karen Kirk	527 St George Street E	Fergus ON	527 St George Street E Fergus ON	Tourism Retail
175	Shaw Music	570 Elgin St	Fergus ON	570 Elgin St Fergus ON	Tourism Retail
176	Cordial Clove Books	62 Metcalfe Street	Elora ON	62 Metcalfe Street Elora ON	Tourism Retail
177	Olde Crow	45 Mill St W	Elora ON	45 Mill St W Elora ON	Tourism Retail
178	Pickletree Creations	439 Black Street	Fergus ON	439 Black Street Fergus ON	Tourism Retail
179	Norsco Sports	295 Main St W	Palmerston ON	295 Main St W Palmerston ON	Tourism Retail
180	Geissler Pipe Organs	5960 5Th Line	Rockwood ON	5960 5Th Line Rockwood ON	Tourism Retail
181	Village Music Store, The	140 Main St Unit 5	Erin ON	140 Main St Unit 5 Erin ON	Tourism Retail
182	Wilson's Sporting Tradition Inc	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Tourism Retail
183	Chipps Distributing	610 St Andrew St W	Fergus ON	610 St Andrew St W Fergus ON	Tourism Retail
184	Jester's Fun Factory Ltd	735 Tower St S Suite 114	Fergus ON	735 Tower St S Suite 114 Fergus ON	Tourism Retail
185	Lucky Charm Ceramics And Gifts	185 George St	Arthur ON	185 George St Arthur ON	Tourism Retail
186	Looney Tooney Inc	735 Tower St S	Fergus ON	735 Tower St S Fergus ON	Tourism Retail
187	Dollarama #1320	875 St David Street N	Fergus ON	875 St David Street N Fergus ON	Tourism Retail



188	Cover-Ups Carpet, Flooring, Paint And More	199 St Andrew St W	Fergus ON	199 St Andrew St W Fergus ON	Tourism Retail
189	Looney Tooney	480 Smith St	Arthur ON	480 Smith St Arthur ON	Tourism Retail
190	Fusion Party And Discount	930 Omar St	Fergus ON	930 Omar St Fergus ON	Tourism Retail
191	BFM (Fergus) Enterprises Society	525 Maple St	Fergus ON	525 Maple St Fergus ON	Tourism Retail
192	Bargain Barns	157 George St	Arthur ON	157 George St Arthur ON	Tourism Retail
193	Wal-Mart Canada Corp	801 St David St N	Fergus ON	801 St David St N Fergus ON	Tourism Retail
194	Giant Tiger Stores Limited	900 Tower St S	Fergus ON	900 Tower St S Fergus ON	Tourism Retail
195	H&H Gill Brothers Holdings Ltd	405 Main St	Palmerston ON	405 Main St Palmerston ON	Tourism Retail
196	Bluewave Energy Ltd	228 Arthur St	Harriston ON	228 Arthur St Harriston ON	Tourism Retail
197	St. Mary & St. Bishoy Company Inc	777 Tower St S	Fergus ON	777 Tower St S Fergus ON	Tourism Retail
198	6838979 Canada Corp	8006 Wellington Rd Suite 109	Arthur ON	8006 Wellington Rd Suite 109 Arthur ON	Tourism Retail
199	Blinkhorn Motors Ltd	935 St David St N	Fergus ON	935 St David St N Fergus ON	Tourism Retail
200	Pelp Limited Partnership	5572 Highway 9	Harriston ON	5572 Highway 9 Harriston ON	Tourism Retail
201	10352 Ontario Inc	290 Scotland St	Fergus ON	290 Scotland St Fergus ON	Tourism Retail
202	Pelp Limited Partnership	256 Brock Rd S	Puslinch ON	256 Brock Rd S Puslinch ON	Tourism Retail
203	NMR Corp	264 Alma St	Rockwood ON	264 Alma St Rockwood ON	Tourism Retail
204	Air-Serv A Ps712326	5572 Highway 9 Rr 4	Harriston ON	5572 Highway 9 Rr 4 Harriston ON	Tourism Retail
205	Burger Station	600 Scotland St	Fergus ON	600 Scotland St Fergus ON	Tourism Retail
206	Erin Esso	61 Main St	Erin ON	61 Main St Erin ON	Tourism Retail
207	Rockwood Esso	248 Alma Street	Rockwood ON	248 Alma Street Rockwood ON	Tourism Retail
208	Shell Gas	315 Brock Rd S	Puslinch ON	315 Brock Rd S Puslinch ON	Tourism Retail
209	Genuine Herbs Oils And Extracts Inc.	20 Main Street	Erin ON	20 Main Street Erin ON	Tourism Retail

210	Esso	820 St David St N	Fergus ON	820 St David St N Fergus ON	Tourism Retail
211	Pioneer	315 Brock Road S	Puslinch ON	315 Brock Road S Puslinch ON	Tourism Retail
212	Ultramar Gas Stations	935 St David St N	Fergus ON	935 St David St N Fergus ON	Tourism Retail
213	Petro-Canada	9408 Wellington Rd 124 Rr 2	Erin ON	9408 Wellington Rd 124 Rr 2 Erin ON	Tourism Retail
214	Pioneer Gas Bar	Suite 3 256 Brock Rd S	Puslinch ON	Suite 3 256 Brock Rd S Puslinch ON	Tourism Retail
215	Petro-Canada	7994 Wellington Road 12 Rr 4 Suite 109	Arthur ON	7994 Wellington Road 12 Rr 4 Suite 109 Arthur ON	Tourism Retail
216	Ultramar Gas Station	280 Main St	Erin ON	280 Main St Erin ON	Tourism Retail
217	Petro Canada	405 Main Street	Palmerston ON	405 Main Street Palmerston ON	Tourism Retail
218	Petro Canada	295 Alma	Rockwood ON	295 Alma Rockwood ON	Tourism Retail
219	KMO521 Management Co Ltd	94 Woolwich St W	Elora ON	94 Woolwich St W Elora ON	Tourism Retail
220	ExxonMobil Canada Ltd	330 Tower St S	Fergus ON	330 Tower St S Fergus ON	Tourism Retail
221	Ren's Feed And Supplies Limited	20 Brock Rd N Unit 3	Puslinch ON	20 Brock Rd N Unit 3 Puslinch ON	Tourism Retail
222	Kaboom Fireworks	950 Tower St S	Fergus ON	950 Tower St S Fergus ON	Tourism Retail
223	Stewart's, Ed Garage & Equipment Ltd	9410 Wellington Rd 124 Rr 2	Erin ON	9410 Wellington Rd 124 Rr 2 Erin ON	Tourism Retail
224	DeBoer's Farm Equipment Limited	519 Wellington Rd 7	Elora ON	519 Wellington Rd 7 Elora ON	Tourism Retail
225	Connect Equipment Corporation	5205 3Rd Line Rr 3 Suite 3	Rockwood ON	5205 3Rd Line Rr 3 Suite 3 Rockwood ON	Tourism Retail
226	Parr Auctions	6866 6 Hwy	Fergus ON	6866 6 Hwy Fergus ON	Tourism Retail
227	MINTO ARTS COUNCIL	88 Mill Street Box 760	Harriston ON	88 Mill Street Box 760 Harriston ON	Tourism Retail
228	Fergus Pet Shop, The	277 St Andrew St W	Fergus ON	277 St Andrew St W Fergus ON	Tourism Retail
229	Pamper Me	178 Alma St Unit 4	Rockwood ON	178 Alma St Unit 4 Rockwood ON	Tourism Retail
230	Caledon Timberframes Inc.	5912 Winston Churchill Boulevard	Erin ON	5912 Winston Churchill Boulevard Erin ON	Tourism Retail
231	7091605 Canada Inc.	6484 Wellington Rd 7	Elora ON	6484 Wellington Rd 7 Elora ON	Tourism Retail

232	Harriston Superior Monuments	60 Mill	Harriston ON	60 Mill Harriston ON	Tourism Retail
233	Pet Value Discount Pet Food Inc	882 Tower St S	Fergus ON	882 Tower St S Fergus ON	Tourism Retail
234	Hubbard, G. & Sons Ltd	78 Mill St	Harriston ON	78 Mill St Harriston ON	Tourism Retail
235	Shade Plus Inc	6755 Gerrie Rd	Elora ON	6755 Gerrie Rd Elora ON	Tourism Retail
236	Watermatters Inc	180 St Andrew St W Suite B	Fergus ON	180 St Andrew St W Suite B Fergus ON	Tourism Retail
237	Lesters Ai Service	8845 School Rd 7 Rr 3	Palmerston ON	8845 School Rd 7 Rr 3 Palmerston ON	Tourism Retail
238	Dragon Vape-Fergus	18 Strome Lane	Fergus ON	18 Strome Lane Fergus ON	Tourism Retail
239	Gary Tuck Water Specialist	360 Queen St E	Fergus ON	360 Queen St E Fergus ON	Tourism Retail
240	Grand River Gallery Art And Frame	619 Orangeville Rd	Fergus ON	619 Orangeville Rd Fergus ON	Tourism Retail
241	Caledon Trophy	166 Milligan St	Fergus ON	166 Milligan St Fergus ON	Tourism Retail
242	Bottleworx	124 Alicia Lane Rr 2	Rockwood ON	124 Alicia Lane Rr 2 Rockwood ON	Tourism Retail
243	Made Fur You	Apartment 5 135 St David Street N	Fergus ON	Apartment 5 135 St David Street N Fergus ON	Tourism Retail
244	Tristin King	564 Harvey Street	Fergus ON	564 Harvey Street Fergus ON	Tourism Retail
245	Sbc Green Innovations Corp.	6478 Fifth Line	Fergus ON	6478 Fifth Line Fergus ON	Tourism Retail
246	C & A Distributing Inc	7818 Wellington Road 12 Rr 4	Arthur ON	7818 Wellington Road 12 Rr 4 Arthur ON	Tourism Retail
247	Nieuwland Feed & Supply Limited	49 Elora St S	Clifford ON	49 Elora St S Clifford ON	Tourism Retail
248	Westmount Pool & Spa Fergus	920 St David Street N Suite 3	Fergus ON	920 St David Street N Suite 3 Fergus ON	Tourism Retail
249	Canadian Didactic Inc.	290 St George St E	Fergus ON	290 St George St E Fergus ON	Tourism Retail
250	Silvercreek Aquaculture Inc	8 Mountainview Cres SS 1	Erin ON	8 Mountainview Cres SS 1 Erin ON	Tourism Retail
251	Elite Equine Supplies	8447 Wellington Rd 22 Rr 1	Rockwood ON	8447 Wellington Rd 22 Rr 1 Rockwood ON	Tourism Retail
252	Liquidation Depot Inc	3 Badenoch St E	Morrison ON	3 Badenoch St E Morrison ON	Tourism Retail
253	Us Rinkmaster	4555 Victoria Rd S	Puslinch ON	4555 Victoria Rd S Puslinch ON	Tourism Retail

254	Sharpe Farm Supplies Ltd	285 Beatty Line N	Fergus ON	285 Beatty Line N Fergus ON	Tourism Retail
255	M & M Family Acres Inc	8719 East Owen Sound Rd	Arthur ON	8719 East Owen Sound Rd Arthur ON	Tourism Retail
256	Arnaf Inc	7377 Calfass Road	Puslinch ON	7377 Calfass Road Puslinch ON	Tourism Retail
257	Rectify Electric Ltd	7448 Speers Rd Unit B	Elora ON	7448 Speers Rd Unit B Elora ON	Tourism Retail
258	1813198 Ontario Inc	7309 Fifth Line	Belwood ON	7309 Fifth Line Belwood ON	Tourism Retail
259	Mount Forest Memorials	375 St Andrew St W	Fergus ON	375 St Andrew St W Fergus ON	Tourism Retail
260	Pamper Me	115 Geddes St	Elora ON	115 Geddes St Elora ON	Tourism Retail
261	Rick's Farm Service & Installation	6121 Eighth Line Rr 3	Harriston ON	6121 Eighth Line Rr 3 Harriston ON	Tourism Retail
262	R and R Pet Paradise	9449 Road 1 N Rr 1	Harriston ON	9449 Road 1 N Rr 1 Harriston ON	Tourism Retail
263	Country Forge & Gifts, The	133 Queen St W	Fergus ON	133 Queen St W Fergus ON	Tourism Retail
264	Prometheus	118 Main S	Rockwood ON	118 Main S Rockwood ON	Tourism Retail
265	Weathervane, The	74 Main St	Erin ON	74 Main St Erin ON	Tourism Retail
266	1335135 Ontario Inc	191 St Andrew St W	Fergus ON	191 St Andrew St W Fergus ON	Tourism Retail
267	Glassmakers Gallery Inc	8 Mill St W	Elora ON	8 Mill St W Elora ON	Tourism Retail
268	POD Fashion & Design	75 Metcalfe St	Elora ON	75 Metcalfe St Elora ON	Tourism Retail
269	Gingko Unique Gifts	Suite 6 45 Mill Street W	Elora ON	Suite 6 45 Mill Street W Elora ON	Tourism Retail
270	Hw Designs And Gif	9161 Wellington Rd 5 Rr 2	Harriston ON	9161 Wellington Rd 5 Rr 2 Harriston ON	Tourism Retail
271	Joanie's Crafts Gifts & Stained Glass	116 St Andrew St W	Fergus ON	116 St Andrew St W Fergus ON	Tourism Retail
272	Medusa Turn To Stone	65 Metcalfe St	Elora ON	65 Metcalfe St Elora ON	Tourism Retail
273	Symmetry Home And Life	81 Metcalfe St	Elora ON	81 Metcalfe St Elora ON	Tourism Retail
274	Fantasy Figures	105 Queen St W	Fergus ON	105 Queen St W Fergus ON	Tourism Retail
275	Ancient Ways	30 Church St	Elora ON	30 Church St Elora ON	Tourism Retail

276	River's Edge Gift Shop	160 Main S	Rockwood ON	160 Main S Rockwood ON	Tourism Retail
277	Elora Hotel	77 Mill Street	Elora ON	77 Mill Street Elora ON	Tourism Retail
278	Seasons and Cinnamon	22 Metcalfe St	Elora ON	22 Metcalfe St Elora ON	Tourism Retail
279	Mitch Keirstead Limited	147 George St	Arthur ON	147 George St Arthur ON	Tourism Retail
280	Wilde Thyme	102 Metcalfe St	Elora ON	102 Metcalfe St Elora ON	Tourism Retail
281	Half Moon St Boutique	56 Mill St W	Elora ON	56 Mill St W Elora ON	Tourism Retail
282	Jammed Lovely	58 Mill St W	Elora ON	58 Mill St W Elora ON	Tourism Retail
283	Esso	555 Main Street W Rr 2	Palmerston ON	555 Main Street W Rr 2 Palmerston ON	Tourism Retail
284	UNWIND	60 Mill St W	Elora ON	60 Mill St W Elora ON	Tourism Retail
285	Past & Presents	62 Metcalfe St	Elora ON	62 Metcalfe St Elora ON	Tourism Retail
286	Season's Home Decor	45 Mill St W	Elora ON	45 Mill St W Elora ON	Tourism Retail
287	J Mar Custom Meats	391064 Grey Road 109	Mount Forest ON	391064 Grey Road 109 Mount Forest	Tourism Retail
288	Premier Equipment Ltd.	311303 6 Hwy Rr 3	Mount Forest ON	311303 6 Hwy Rr 3 Mount Forest	Tourism Retail
289	1159488 Ontario Limited	237 Main St S	Mount Forest ON	237 Main St S Mount Forest	Tourism Retail
290	6ycthe Clothing Corp	236 Main St N	Mount Forest ON	236 Main St N Mount Forest	Tourism Retail
291	Country Creations Of Mount Forest Ltd	125 Queen St E	Mount Forest ON	125 Queen St E Mount Forest	Tourism Retail
292	Petro-Pass	6892 Hwy 89 W	Mount Forest ON	6892 Hwy 89 W Mount Forest	Tourism Retail
293	International Trade Specialists	189 Main St N	Mount Forest ON	189 Main St N Mount Forest	Tourism Retail
294	Brewers Retail Inc	429 Main St N	Mount Forest ON	429 Main St N Mount Forest	Tourism Retail
295	Liquor Control Board of Ontario, The	195 King St E	Mount Forest ON	195 King St E Mount Forest	Tourism Retail
296	Viva Corp Properties Inc	310 Main St S	Mount Forest ON	310 Main St S Mount Forest	Tourism Retail
297	Pc Express 3684	504 Main Street N	Mount Forest ON	504 Main Street N Mount Forest	Tourism Retail

298	Aldergrove Farm	211537 Baseline Rr 4	Mount Forest ON	211537 Baseline Rr 4 Mount Forest	Tourism Retail
299	Tickle Your Fancy Gift Boutique	146 McFarlin Dr RR 3	Mount Forest ON	146 McFarlin Dr RR 3 Mount Forest	Tourism Retail
300	Weber's Bicycle	44776 Gate Rd S Suite 04	Mount Forest ON	44776 Gate Rd S Suite 04 Mount Forest	Tourism Retail
301	Everything Asphalt	9196 Concession 11 Rr 5	Mount Forest ON	9196 Concession 11 Rr 5 Mount Forest	Tourism Retail
302	576776 Ontario Inc	162 Main St	Mount Forest ON	162 Main St Mount Forest	Tourism Retail
303	Meat the Butcher	157 Main S	Mount Forest ON	157 Main S Mount Forest	Tourism Retail
304	EliteWaterAndAir.com	181 McFarlin Dr RR 3	Mount Forest ON	181 McFarlin Dr RR 3 Mount Forest	Tourism Retail
305	The Saddle Shack Custom Tack & Leatherwork	271346 Grey Road 6 Rr 3	Mount Forest ON	271346 Grey Road 6 Rr 3 Mount Forest	Tourism Retail
306	DC Whitt at the Pumps	504 Main St N	Mount Forest ON	504 Main St N Mount Forest	Tourism Retail
307	Herbalife	350 Perth St	Mount Forest ON	350 Perth St Mount Forest	Tourism Retail
308	The Perfect Piece	111 Queen Street W	Mount Forest ON	111 Queen Street W Mount Forest	Tourism Retail
309	Meadowbrook Agri Systems	43868 Southgate Road 4	Mount Forest ON	43868 Southgate Road 4 Mount Forest	Tourism Retail
310	Bargan Mart Variety	129 Birmingham St W	Mount Forest ON	129 Birmingham St W Mount Forest	Tourism Retail
311	Train Cellar-Classic Trains, The	130 Main St N	Mount Forest ON	130 Main St N Mount Forest	Tourism Retail
312	Khalsa Gas Bar	209 Main St N	Mount Forest ON	209 Main St N Mount Forest	Tourism Retail
313	Mlc/Dishswear	410 Cork Street	Mount Forest ON	410 Cork Street Mount Forest	Tourism Retail
314	Lularoe With S	288 Church St S	Mount Forest ON	288 Church St S Mount Forest	Tourism Retail
315	The Eco Den.	149 Main Street N	Mount Forest ON	149 Main Street N Mount Forest	Tourism Retail
316	Sherry's on Main	157 Main St	Mount Forest ON	157 Main St Mount Forest	Tourism Retail
317	Marshall Adventure Wear	124 Fergus St S	Mount Forest ON	124 Fergus St S Mount Forest	Tourism Retail
318	Deb's Gift Shop	253 Main St N	Mount Forest ON	253 Main St N Mount Forest	Tourism Retail
319	Mud Pies	245 Main St N	Mount Forest ON	245 Main St N Mount Forest	Tourism Retail



320	Cynthia & Co.	162 Main St S	Mount Forest ON	162 Main St S Mount Forest	Tourism Retail
321	Karl Cook Fuels Ltd	380 Main St S Suite 3	Mount Forest ON	380 Main St S Suite 3 Mount Forest	Tourism Retail
322	Shea, Michael Woodcarving	169 Norpark St	Mount Forest ON	169 Norpark St Mount Forest	Tourism Retail
323	ExxonMobil Canada Ltd	504 Main St N	Mount Forest ON	504 Main St N Mount Forest	Tourism Retail
324	I'm Soooooooo Bad	110 Main N	Mount Forest ON	110 Main N Mount Forest	Tourism Retail
325	Raven's Rune, The	245 Main St N	Mount Forest ON	245 Main St N Mount Forest	Tourism Retail
326	B. Active Cycle & Fitness	9174 Concession 11 Rr 5	Mount Forest ON	9174 Concession 11 Rr 5 Mount Forest	Tourism Retail



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# COUNTY OF WELLINGTON

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## COMMITTEE REPORT

**To:** Chair and Members of the Economic Development Committee  
**From:** Justine Dainard, Smart Cities Project Manager  
**Date:** Tuesday, March 21, 2023  
**Subject:** **Smart Cities Office – March 2023 update**

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### **Background:**

Update on programmes within the Our Food Future project.

### **Food Security Action Plan**

Since the launch of the Our Food Future project, the Nutritious Food Workstream has been focused on creating improvements in equitable food access. Wellington-Dufferin-Guelph Public Health has been a foundational member of this workstream, ensuring our work was grounded in strong research and reflected local issues.

As our project has entered its last year of federal funding, this workstream has drafted a Food Security Action Plan to ensure a way to keep the work going. Recent activities include:

- Convening the Food System Resiliency Table (The Table). The Table is comprised of a diverse group from County and City who gather for discussions and community building. The Table is currently re-evaluating the 2011 Guelph-Wellington Food Charter and hosting public meetings to discuss food access and resources.
- Enabling more support in the County. Working with the Centre Wellington Community Foundation (CWCF), funding will be provided to the Mount Forest & Area Community Gardens, to Syrian New Canadian gardeners in the Harriston area, and to the CWCF's work in food access and equity issues.

### **COIL business programmes**

The Circular Opportunity Innovation Launchpad (COIL) continues to create new paths to business innovation by scaling in interesting ways.

Last month, a new cohort was launched under the Circular Demonstration Challenge. This challenge was open to teams from across Southern Ontario but designed to reflect regional differences; a letter of support from a local Economic Development Office was required in order to ensure alignment with local municipal priorities.

The National Construction and Demolition Circular Innovation Challenge is currently accepting applications from across Canada. Working with the Vancouver Economic Commission and Halifax Partnership, with funding from Co-operators and Skyline, this is COIL's first Canada-wide challenge. It will result in a 6-month pilot focused on improving circularity in construction and demolition. Applications close April 21; for more information and to apply please visit <https://coil.eco/natlchallenge>

Recommendation:

That the Economic Development Committee receive the Smart Cities Office report for information.

Respectfully submitted,

A handwritten signature in black ink, reading "Justine Dainard". The script is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

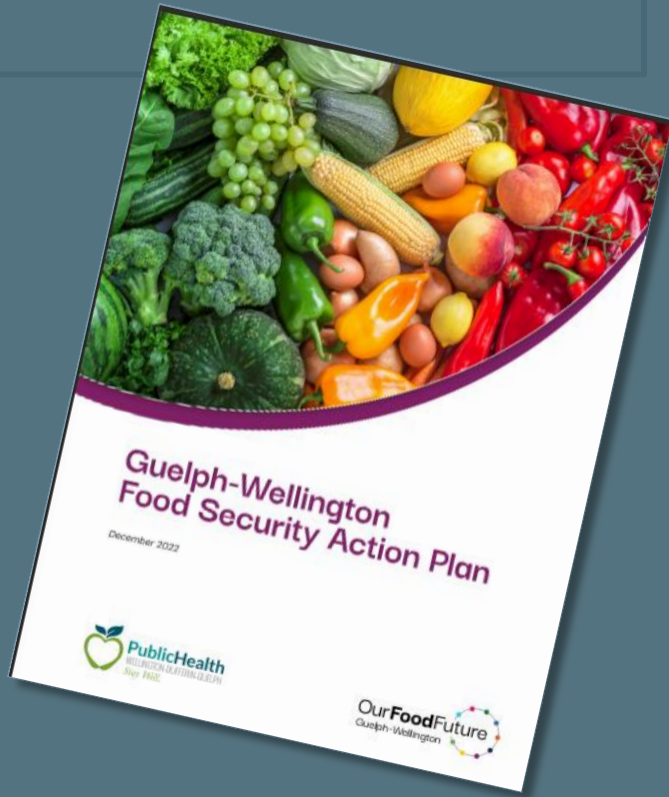
Justine Dainard  
Smart Cities Project Manager

# SMART CITIES OFFICE

March 2023



# FOOD SECURITY ACTION PLAN



## Food System Resiliency Table (The Table)

- Gathers 8x year
- Next meeting in May
- Re-drafting the 2011 Food Charter

## More food access funding

- Centre Wellington Community Foundation
- Mount Forest community gardens
- New Canadian gardens
- Coordinator for CWCF food equity work



## COIL BUSINESS SUPPORTS



## Circular Demonstration Challenge

- Southern Ontario intake
- Economic Development alignment
- Climate smart solutions

## National Construction and Demolition Circular Innovation Challenge

- Vancouver Economic Commission
- Halifax Partnership
- Co-operators and Skyline
- National Challenge

# PFISTERER FARM, KENILWORTH

<b>Project Summary</b>	Trialing the use of hemp hurd as an alternate bedding source for cattle, chicken and pigs
<b>Funding</b>	\$2000.00 (hemp hurd, bast)
<b>Research Question</b>	Are there economic benefits to switching to hemp hurd for bedding? How is the solid manure nutrient content affected when switching from straw bedding to hemp hurd?
<b>Outcome</b>	To determine if the upfront cost of hemp hurd bedding is offset through decreased labour costs
<b>Analysis</b>	<ul style="list-style-type: none"><li>• Labour cost tracking</li><li>• Manure nutrient analysis</li><li>• General animal welfare monitoring</li></ul>



Photos by  
Jess Pfisterer

# CLARE DRISCOLL, MAPLETON

<b>Project Summary</b>	Rotational grazing of layer hens
<b>Funding</b>	\$3000.00 (chicken housing)
<b>Research Question</b>	How are baseline soil health parameters affected by chicken grazing? How is egg yield affected by chicken grazing? Can carbon sequestration be increased through chicken grazing?
<b>Outcome</b>	To determine the optimal frequency of rotation to sequester carbon
<b>Analysis</b>	<ul style="list-style-type: none"><li>• Baseline soil sampling (P,K, %OM)</li><li>• SLAKE testing, infiltration, compaction, green cover</li><li>• Yield and labour recording</li></ul>







**THANK YOU**





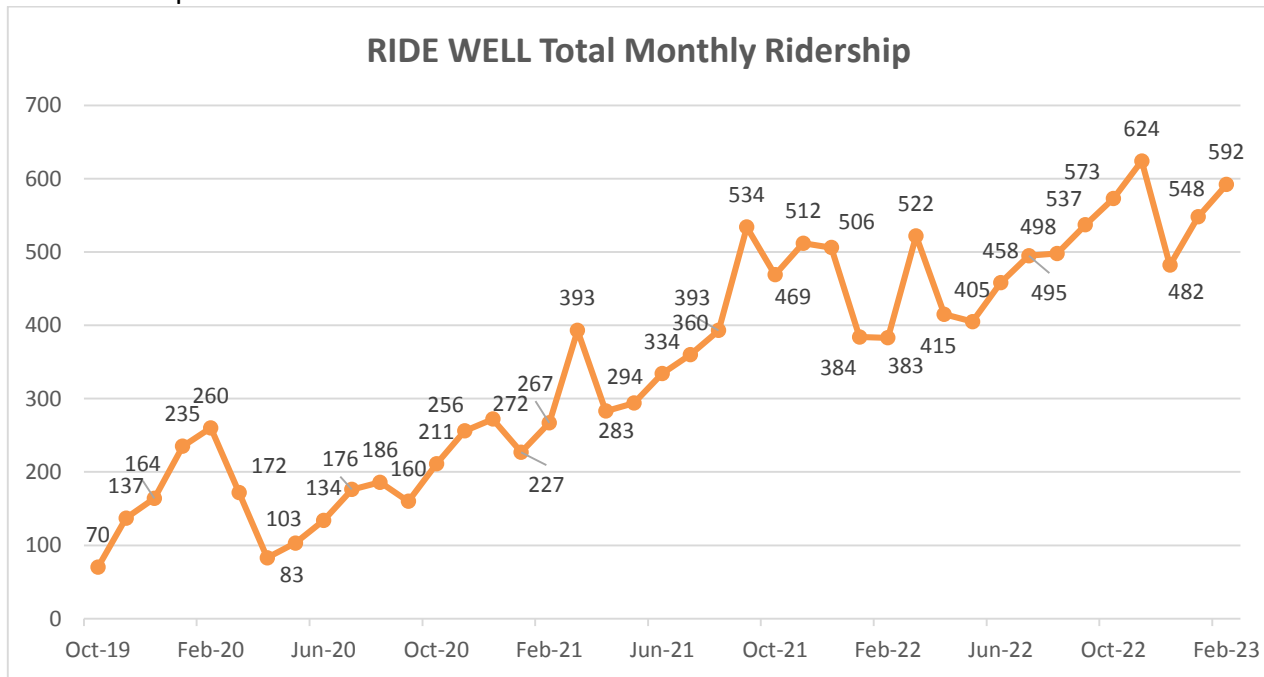
# COUNTY OF WELLINGTON

## COMMITTEE REPORT

**To:** Chair and Members of the Economic Development Committee  
**From:** Christina Mann, Manager of Economic Development  
**Date:** Tuesday, March 21, 2023  
**Subject:** Economic Development Report

### Ride Well

Ride Well continues to grow and provide community-wide transportation. There were 592 rides in February, an increase of 44 rides over January. With only 19 operating days in February, this is a strong increase from January which had 22 operating days. The following graph outlines monthly total ridership of the service since launch:



Increased ridership in February resulted from more users accessing the service. The total number of users increased from 89 in January to 106 in February. There were also 29 new users in February, which is the highest monthly total of new riders since November 2019. Lastly, there was notable growth in the average rides per day from 25 in January to 31 in February. The following table provides a summary of performance.

Month	Rides/ Bookings	Passengers /Seats	Unique users	New users	Average rides per user	Average Rides Per Day	New accounts registered
December 2022	482	513	106	17	4.5	23	47
January 2023	548	567	89	16	6.2	25	62
February 2023	592	614	106	29	5.6	31	45

Two new part-time casual drivers were added to the Ride Well driver pool at the start of March. These drivers will fill in for the service when full-time drivers have unforeseen absences (i.e. illness, family matters) and planned absences (i.e. vacations, appointments). This will help maintain driver supply and reliability for customers moving forward.

### Community Improvement Programme

Before:



After:



Congratulations to Greystone Housing Inc for completing their Invest MORE project in downtown Rockwood. This project converted a previously vacant retirement home into a new mixed-use development with a physiotherapy business on the bottom floor and 4 new 2-bedroom rental units above.

### Taste Real

Taste Real collaborated with Our Food Future and the Guelph Box to create a 'Guelph Wellington Circular Box' highlighting local food and products from 9 different vendors who employ circular or sustainable practices in their operations. A total of 51 boxes were distributed on February 28, generating \$3,162.00 in revenue for these local businesses.

For the month of March, Taste Real's marketing efforts are geared towards seasonal promotions such as Maple Syrup producers and experiences and encouraging people to sign up for Community Supported Agriculture Farm Share programmes to support local farmers.







## 2023 Taste Real Events:

### Spring Rural

May 27 – Northern Wellington County

### Fall Rural Romp

September 30 – Southern Wellington County

### Feast On The Farm

October 1, 2 – Thatcher Farms

## Experience Wellington

Our [Winter Adventures campaign](#), highlighting outdoor and indoor winter activities and unique experiences offered by local businesses, saw 4,397 website pageviews from January 28 to March 14. The Winter Adventures map, created in partnership with the Planning Department, produced 5,409 views.

In collaboration with the Communications division, staff is preparing a Spring Experience Campaign set to launch in April. This campaign will feature a range of activities, including visits to greenhouses and gardening destinations, indoor experiences, such as theatre and dining, as well as Mother's Day activities and spring events.

Staff applied for the RTO 4 (Regional Tourism Organization 4) Partnership Programme. If approved, the Partnership funding will support the development of cycle tourism itineraries for Wellington County. This initiative builds upon the Cycle Tourism Assessment completed by Ontario By Bike in the fall of 2022.

## Housing

To showcase additional alternative housing options, staff are collaborating with Letter M Marketing to create a series of public-facing stories for online and print media. Specifically, these stories will feature real-life examples of County residents who have added Additional Residential Units (ARUs) to their existing homes and new builds, such as basement or garage apartments, granny/garden suites, and more. Staff will be collecting local examples through a social media call-out and introductions through community partners. According to registered building permit IDs, there are 319 ARUs in Wellington County as of June 2022.



## **Downtown Development**

To further support Downtown Development activities outlined in the 3-Year Plan, staff applied to the Rural Economic Development (RED) fund in collaboration with the Wellington Waterloo Community Futures Corporation. If successful, funding will support a coordinated effort to develop and/or support community-specific downtown revitalization priorities and develop a Destination Downtown marketing campaign.

## **Skilled Trades**

Staff continue to provide support as part of the organizing committee for the Trade Tracks Skilled Trade Event, hosted by the Southern Wellington Lions Club on May 5 and 6 at the Centre Wellington Community Sportsplex. Skilled Trades support falls directly in line with priorities outlined in the Economic Development 3-Year Plan and as such, the County is dedicating \$5,000 for the specific implementation of this event.

## **Healthcare Workforce Attraction**

The Talent Attraction Coordinator met with the Township of Centre Wellington and the Centre Wellington Healthcare Alliance (Groves Memorial Hospital specifically) to discuss healthcare workforce needs as a committee. Research and outreach activities have been taking place to understand what neighbouring regions and counties are doing to address the workforce challenge. This has resulted in establishing relationships with the Guelph-Wellington Health Workforce, and Ontario Health Team, both of which are provincial health task forces set up to help rural healthcare providers and hospitals with current trends and information to support their recruitment efforts.

The Township of Centre Wellington has extended its support by offering office space at 205 Queen Street East, to be used as medical practices offices. Other recommendations include considering an old farmhouse on Gartshore Street, Fergus as potential accommodation for physicians and primary care doctors. The County will be working towards strategizing and taking action on initiatives to attract healthcare workforce by way of promoting practice opportunities in Wellington County. The working committee will reconvene at the end of this month to further discuss next steps and clarify our roles as municipalities.

Given the healthcare crisis is a nationwide crisis, non-traditional methods of meeting workforce needs are being tapped into, such as pre-arrival services, and healthcare connection programmes. These free-of-cost programmes (funded by IRCC) connect healthcare employers with immigrants seeking positions in non-regulated healthcare professions before they land in Canada. They also bridge immigrants seeking employment in healthcare with non-regulated professions while they are pursuing licensure. A relationship has been established with one such service provider, Access Employment.



Funded by Immigration, Refugees and Citizenship Canada and the Ontario Ministry of Labour, Training and Skills Development



Immigration, Refugees and Citizenship Canada



Immigration, Réfugiés et Citoyenneté Canada



Visit us online for more information:

[acesemployment.ca/healthcare-connections](https://acesemployment.ca/healthcare-connections)



## Healthcare Connections

Healthcare Connections supports internationally educated, healthcare professionals in securing non-licensed employment in the broader healthcare sector. Program participants will learn a range of job-seeking strategies, build the necessary skillsets to translate their healthcare experience into non-licensed roles and are regularly connected with sector-specific employers.

**Healthcare Connections has two streams:**



**Health Systems:** Receive guidance to transition into careers within pharmaceuticals, healthcare administration and clinical research.



**Community Health:** Take part in rigorous training from Centennial College, PSHSA and LAMP CHC to transition to careers that build healthy communities by pursuing employment in community health centres, public health, non-profit health organizations and other employers.



## International Students

In-depth meetings have taken place with the Economic Development team of Sarnia Lambton to understand the working model of how they have bridged international students with local jobs, and how this programme could be adapted for Wellington County. Conestoga College's Talent Development and Career Services is interested in partnering with the County to further explore the potential of international students as an untapped workforce locally.



Staff will lead a Table Topic Discussion about hiring international students at the Centre Wellington Chamber of Commerce's business breakfast on March 29 to gather information and perspectives directly from local employers. All data collected will help to inform future funding proposals, as they become available.

## Multicultural Festival

Planning has started for the County's first Multicultural Festival, taking place on September 17 at the Wellington County Museum and Archives. The event will showcase a traditional outfits parade, and various cultural performances in allyship with newcomers, immigrants, and existing community members.

## Newcomer Success Stories

This talent attraction social media campaign features immigrant/newcomer success stories in Wellington County. The purpose of the campaign is to spotlight Wellington County as a place where individuals from different racialized backgrounds work or/and live and have successfully established themselves. Efforts are currently being directed toward recruiting businesses and individuals to participate in this campaign.

**Other Activities**

- Staff contributed content and data for the 2023 Budget Book
- Christina presented at the Guelph Tourism Workshop (open to County Businesses) about Tourism Product Development on February 15
- James delivered a Ride Well presentation at the Active Living and Retirement Show in Fergus on February 24
- Christina participated in a pan-regional tourism group meeting with representatives from Halton and Peel Region, and Dufferin County on February 28
- Staff have been supporting the Erin Open During Construction Group during the Big Dig
- OMAFRA hosted the Community Economic Development 101 training for councillors, community members, and staff from Wellington County and Member Municipalities at the WCMA on March 6
- Staff participated in Wellington County Agri-Food System Study Focus Groups on March 7
- Councillor Duncan and staff met with the local Fed Dev Ontario representative on March 9
- An all-staff meeting was held on March 10 to discuss departmental priorities for 2023
- Staff met with Over Here Community Arts Adventure group based in Hillsburgh on March 13
- In Business News e-newsletter sent January 17, February 17
- Taste Real e-newsletter sent February 13, with special Food Box bulletin sent February 21
- 62 enquiries received from January 11 to March 14, including: Smart Cities (15), Taste Real, Partnership and Events (8), Ride Well (8), Business/Financial Support (7), General Tourism (6), Business Directory (5), Brochures (4), Funding/Promotion/Connections (2), General Information (2), Housing/Internet (2), Land (2), and BR+E (1)

**Recommendation:**

That the Economic Development Committee approve the Economic Development February Report.

Respectfully submitted,



Christina Mann  
Manager of Economic Development