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Waterloo Region

Tourism Master Plan 2023-2030

Building a dynamic destination for the future

Message from the CEO

Explore Waterloo Region is pleased to sponsor this 7-year Tourism Master Plan for Waterloo Region.

Tourism is an important contributor to the local economy. It drives almost 5 million visitors to our region annually, resulting in \$557 million in spending. In addition to supporting local employment, the tax dollars associated with this spending are reinvested into such things as education, healthcare, and housing. The Waterloo Region tourism brand helps create an identity for the area and assists in attracting people that may not only wish to visit, but may decide to live, work, invest, or send their children to school here.

The COVID-19 pandemic was the most challenging time that our industry has ever seen, with massive job losses, business failures, and increased debt for tourism businesses. Tourism was the first industry hit, was the hardest hit, and will be the last to fully recover. This new master plan reflects the region's current state, examines tourism trends, and provides a path to build back an industry that is resilient and sustainable going forward.

The master plan's strategic pillars of Brand, Product, Access, Sustainability and Communications support the goal of being recognized as one of Ontario's most dynamic and connected destinations for leisure, business events and sporting hosting. These pillars also support the development of products and experiences that reflect the unique blend of urban vibrancy and culturally unique, rural settings, resulting in the long-term growth of the region's visitor economy.

Alignment with the strategic plans of all levels of government and other industry stakeholders is critical to extend reach and avoid redundancy of efforts. Ensuring a tourism lens is applied as plans are made for infrastructure developments, etc., is also key.

Collaboration will be critical to the success of this plan – the tourism industry must work in lockstep with government, economic development agencies, and all communities that make up our region. It is imperative we look at what the visitor wants, own our roles, and work together to make the best strategic investments.

Explore Waterloo Region's mandate is to attract visitation and associated tourism revenue through business events, sport hosting and leisure visitation. Although Explore Waterloo Region is not responsible for fulfilling all the recommendations outlined in this document, we will monitor, report on, and advocate for their completion.



Michele Saran
CEO | Explore Waterloo Region



Board of Directors

Explore Waterloo Region would like to thank its Board of Directors for their contribution to the realization of the Tourism Master Plan. Their participation and insights played a key role in the development of the plan, which sets a clear path for the future of the region's visitor economy.

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Land Acknowledgment

The Region of Waterloo is situated on the land traditionally used by the Haudenosaunee, Anishnaabe, and Neutral Peoples.

We acknowledge the enduring presence and deep traditional knowledge, contributions and philosophies of the Indigenous people with whom we share this land today.

We are thankful that we are able to create, collaborate, play and work on this shared land. We support community efforts to sustain a relationship with Indigenous peoples based on respect, dignity, trust and cooperation, in the process of advancing truth and reconciliation.

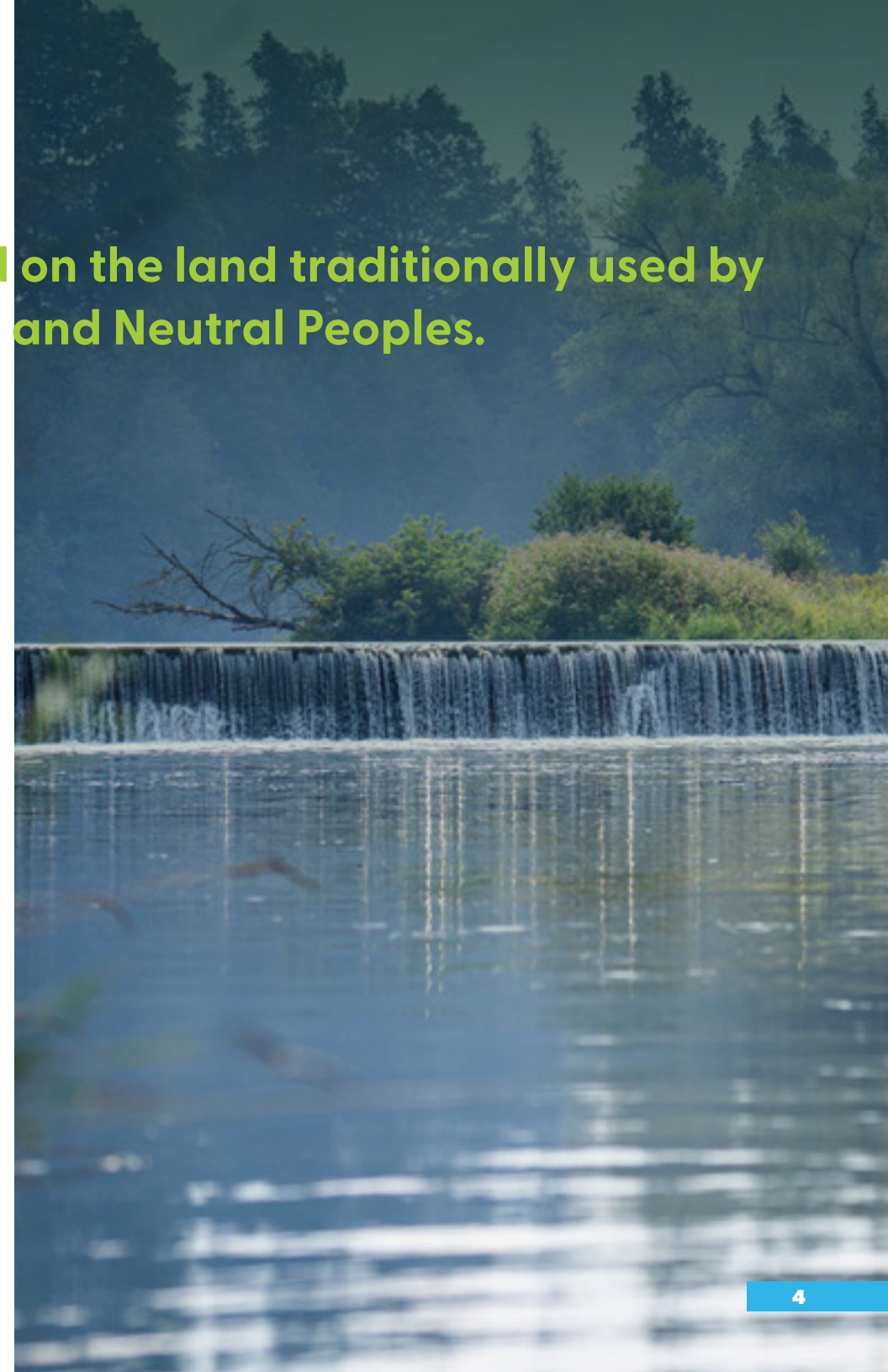


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Executive Summary

Waterloo Region is one of the fastest growing areas in Canada and is ideally situated one hour west of the Greater Toronto Area (GTA), with strong transportation links via GO Transit and Highway 401.

It boasts a vibrant economy of which technology and tourism are significant contributors, given that Waterloo Region is a hub for high-tech companies as well as a variety of festivals, events and culturally-unique towns. The potential of tourism as an economic growth sector led to the recommendation by Explore Waterloo Region to develop a future-focused Tourism Master Plan for the region which would identify growth opportunities and supporting strategic initiatives, aimed at elevating the overall framework and outputs of the industry.

The consulting firm FLOOR13 was contracted to lead the Tourism Master Plan's development effort. Intensive stakeholder research was conducted, as well as a review of tourism assets, a SWOT analysis, desk research and a competitive set analysis in the creation of the plan. This research led to key recommendations and initiatives for guiding Waterloo Region's future tourism growth potential in a way that is both strategic and supportive of Waterloo Region's economic development objectives.

The results of the research and consultation process helped to formulate the Tourism Master Plan's overall Strategic Direction 2030, which describes the desired state of the destination and its tourism industry as a result of the successful achievement of the Growth Pillars, and the implementation of its strategic initiatives.

Strategic Direction 2030:

By 2030 Waterloo Region will be recognized as one of Ontario's most dynamic and connected destinations for the leisure, business events and sport hosting markets. The region will offer products and experiences that reflect its unique blend of urban vibrancy and culturally unique rural settings, resulting in long-term growth of the region's visitor economy.

Executive Summary

Supporting the realization of the Strategic Direction 2030 are five Growth Pillars, which reflect the most significant of the growth and improvement opportunities identified during the research phase. Each Growth Pillar is in turn supported by numerous strategic initiatives and measured by Key Performance Metrics.

Growth Pillars:

1. Brand

Grow Waterloo Region's brand in key markets and visitor segments as a dynamic destination to discover.

2. Product

Promote the growth and quality of leisure, business events and sport hosting product offerings and experiences that align with the region's history and reputation, and that reflect the buying potential of primary markets and visitor segments.

3. Access

Increase alignment and connectivity of access and transportation options, in support of destination development and the growth of current and future markets.

4. Sustainability

Grow the regenerative nature of Waterloo Region's tourism offering through the development of product and experiences that reflect sustainability, and the respectful inclusion of the region's history, culture and Indigenous communities.

5. Communication and Alignment

Align Waterloo Region's municipal, business and resident communities regarding tourism growth initiatives that serve to improve the quality of life throughout the region, while communicating the importance of the visitor economy as a leading growth sector.

Executive Summary

Working together, Waterloo Region's visitor economy shows significant potential for growth and success.

Explore Waterloo Region will take the lead role in coordinating the various elements of the Tourism Master Plan and the tracking of its implementation. However, its overall success will require close cooperation between the Region of Waterloo, municipalities, townships and Explore Waterloo Region, as well as many of its tourism industry stakeholders and economic development partners.



Introduction

Waterloo Region consists of three cities, four townships and one regional government. Together they market the destination's visitor economy through Explore Waterloo Region, the region's destination marketing organization.

As part of the post-COVID-19 pandemic environment, and driven by a desire to increase Waterloo Region's level of competitiveness against a variety of strong Ontario tourism destinations and ultimately grow its future visitor economy, the region has committed to the development of an updated strategic and stakeholder-driven Tourism Master Plan.

This plan takes a long-term approach to the evolution of tourism in Waterloo Region, through a strategic vision involving tourism marketing, product and experience development opportunities, stakeholder participation and municipal and civic support.

Working together, Waterloo Region has the potential to become one of Ontario's leading tourism destinations.





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The Visitor Economy

Strong leadership, compelling products and experiences, committed industry stakeholders and supportive municipal leadership create a vibrant visitor economy.

Tourism Industry Stakeholders

The Tourism Master Plan takes a holistic approach to the development of the visitor economy in the region.

The successful accomplishment of the plan's Strategic Direction and Growth Pillars will largely depend on the cooperation of traditional tourism sector partners (hotels, attractions, restaurants, bars, promoters, airlines, arts and culture venues and sports) but will also need the participation of regional partners related directly or indirectly to the visitor economy.

While Explore Waterloo Region is responsible for promoting the region within Ontario and key Canadian markets, partners such as RTO4 and Destination Ontario play an important role in supporting Explore Waterloo Region's efforts. Economic development authorities are also important strategic partners in the visitor economy by ensuring tourism is considered as a growth sector when planning, developing policy and promoting Waterloo Region.

Waterloo Region Tourism Industry Stakeholders	Government Partners	Tourism Partners	Economic Development	Regional Partners
Hotels	City of Waterloo	Destination Canada	Waterloo EDC	Region of Waterloo International Airport
Restaurants & bars	City of Kitchener	Destination Ontario	Greater Kitchener- Waterloo Chamber of Commerce	University of Waterloo
Attractions	City of Cambridge	Tourism Industry Association of Canada	Cambridge Chamber of Commerce	Wilfred Laurier University
Promoters	Township of North Dumfries	Tourism Industry Association of Ontario	BIA's	Conestoga College
Airlines	Township of Wellesley	Regional Tourism Organization 4 Inc.		Via Rail
Arts & cultural venues	Township of Wilmot	Indigenous Tourism Ontario		
Business events venues & suppliers	Woolwich Township	Waterloo Region Sports Hosting Office		
Sports	Waterloo Region			
Explore Waterloo Region membership				

Policy alignment with Waterloo Region

As the Tourism Master Plan takes a holistic approach to the further development of the visitor economy within the region, other partners' development and strategic plans were taken into consideration to ensure alignment of high-level directions and goals.

These plans included:

1. Waterloo Region Strategic Focus Plan 2019-2023
2. Waterloo Region Economic Development Plan
3. Destination Ontario Business Plan 2022-2023
4. RTO4 Business Plan 2022-2023
5. Destination Canada's *Big Shift* report
6. Indigenous Tourism Ontario 2020-2025 Strategic Plan

“Tourism is a vital economic driver for our local economy. It creates both amenities and jobs that help attract human talent to our city and ensures we build a vibrant community for all our local residents.”

Mayor Berry Vrbanovic, Mayor- City of Kitchener



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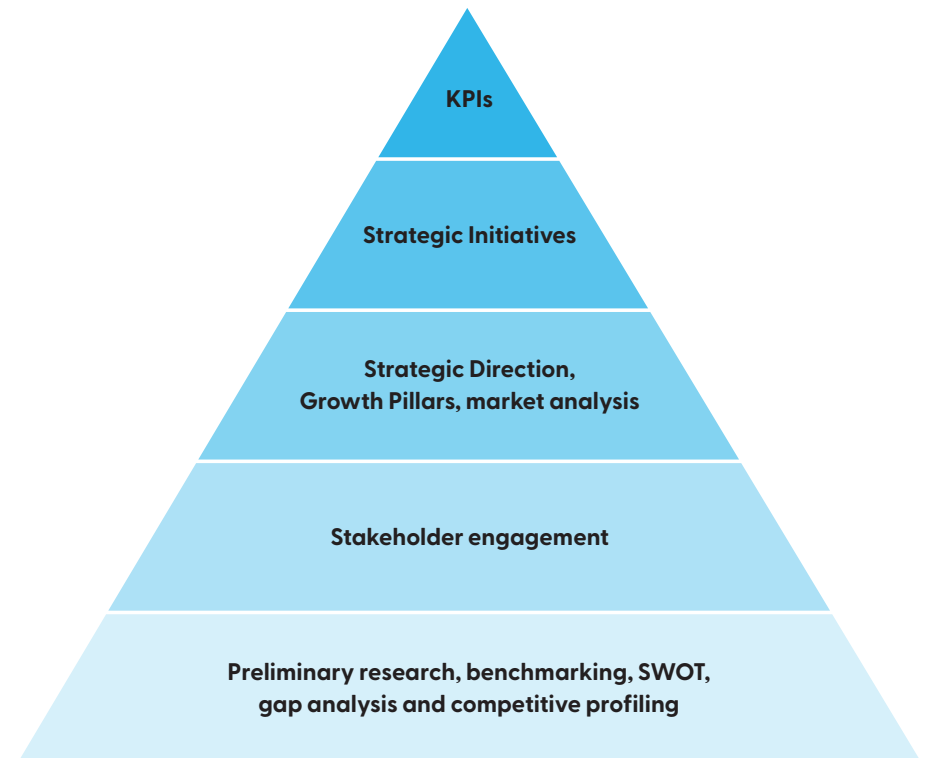
Methodology

Methodology

The Waterloo Region Tourism Master Plan was developed during the second half of 2022 with the participation of the region's tourism stakeholders, municipal authorities and partner agencies.

The region's current visitor economy was reviewed and a SWOT and gap analysis were conducted. Market research was completed on destination trends and best practices, as well as feedback from over one hundred local stakeholders, civic leaders and tourism partner agencies. Regional economic development initiatives, both in progress and in the planning stage, were also taken into consideration. From this, a Strategic Direction, Growth Pillars and Strategic Initiatives were created which will drive the overall Tourism Master Plan.

FLOOR13 would like to thank Explore Waterloo Region, as well as all those who took part in the creation of this plan.





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Situational Analysis

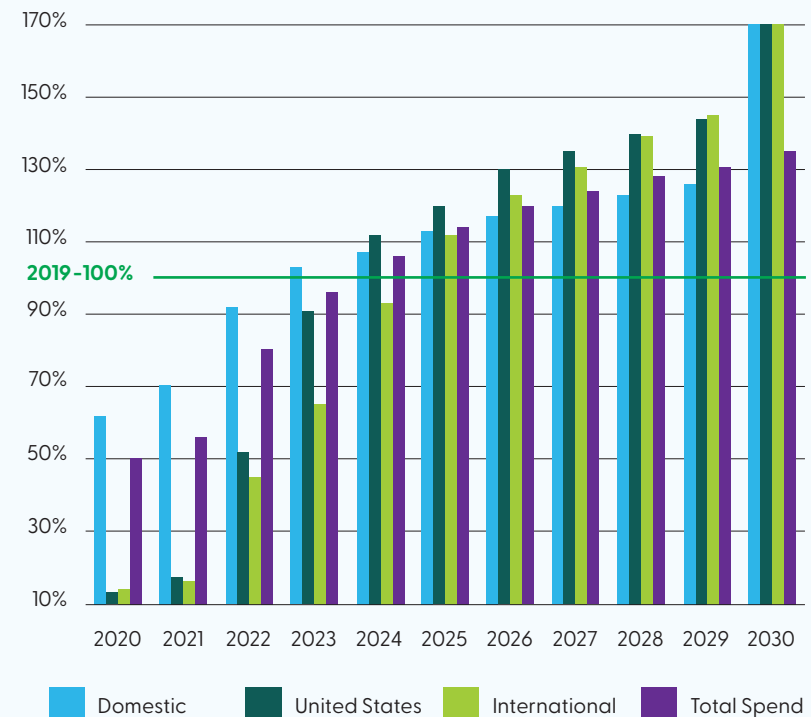
Global and National

The global state of tourism has changed significantly over the past 24 months.

After experiencing worldwide record visitation volumes in 2019, the COVID-19 pandemic brought the entire industry to a virtual halt, resulting in massive layoffs and billions of dollars in lost revenues. Nevertheless, 2022 has demonstrated how resilient the industry can be. The United Nations World Tourism Organization (UNWTO) has estimated that global travel in 2022 will achieve 65% of 2019 visitation levels as a result of pent-up demand and greater customer confidence and willingness to travel.

Destination Canada reports that as of October 2022 US and international arrivals to Canada were at 53% of 2019 levels. Destination Canada remains bullish on Canada's recovery into 2023, projecting that domestic travel will remain strong and that pre inflation adjusted spending levels will equal 2019 by yearend. US travel will reach 91% of its 2019 spending levels in 2023 and surpass full recovery in 2024. International levels will be slower to recover, with Europe facing a mounting recession and inflationary concerns and China experiencing inconsistent travel restrictions. Full recovery of international travel levels are not expected until 2026.

Visitor Spend Projections



Source: Destination Canada October 2022 Fall Outlook report

Global and National

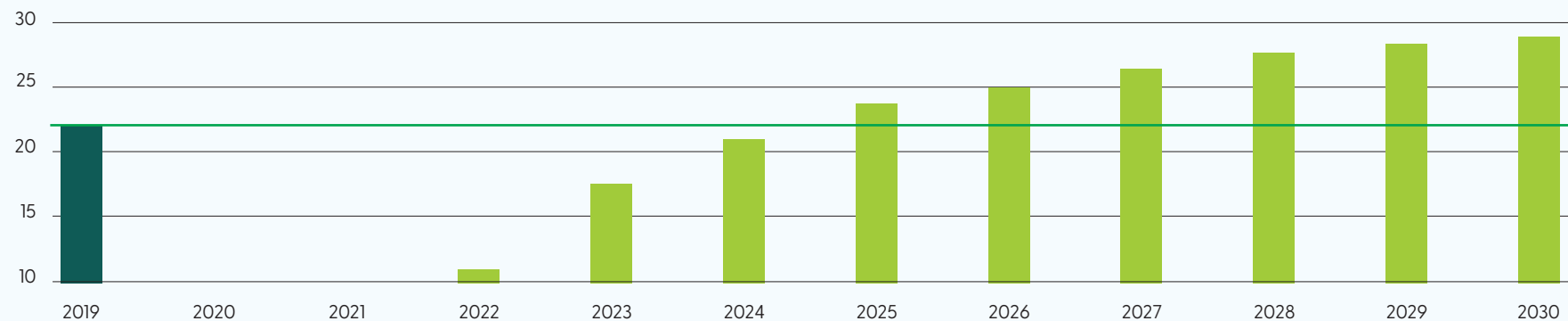
Although visitor spend (unadjusted for inflation) from domestic and US markets is projected to regain pre-pandemic levels within the next 24 months, actual overnight visitation levels will recover at a slower pace but will nonetheless surpass 2019 levels in 24 to 36 months.

As Waterloo Region relies primarily on domestic visitation and does not market internationally, recovery is anticipated to be more rapid in the region than in many other major centres in Canada.

The Canadian government recognizes the visitor economy as a vital part of Canada's economic recovery. Accordingly, the Ministry of

Tourism initiated a tourism recovery fund to help tourism stakeholders develop new products and experiences throughout Canada, as well as providing additional funding to Destination Canada to continue to promote travel to and within Canada from key feeder markets.

Canadian Overnight Visitor Projections (millions)



Source: Destination Canada October 2022 Fall Outlook report

Waterloo Region

Explore Waterloo Region has been the official destination marketing organization (DMO) for Waterloo Region for the past 10 years, and enjoys a positive working relationship with the region's tourism industry and its municipal governments.

Explore Waterloo Region has historically managed with a modest operating and marketing budget, and now has the added benefit of the recently initiated Municipal Accommodations Tax (MAT) which should enable the organization to increase the breadth of its marketing reach and influence.

One of the more significant challenges facing Explore Waterloo Region and the destination is a general lack of brand awareness within Waterloo Region's primary markets. This is largely due to the fact that a compelling brand narrative has yet to be developed that resonates well with potential visitors, particularly within the leisure traveler segment. Consequently, it is not clear within the minds of the GTA and Southern Ontario marketplace what there is to see and do in Waterloo Region, and exactly why they should consider visiting Waterloo Region instead of nearby competitive destinations whose brand narrative is better developed and clearer. This may in part explain why the region is under indexed in the pleasure/leisure segment while nevertheless, holding its own within the RTO4 competitive set on business-related travel visitation. The region is also more reliant on visitors coming to visit friends and family compared with other competitive regions of the province.

While the region boasts of a wide variety of tourism products and facilities to attract both day-trippers and overnight visitors, there are some notable improvement opportunities that, if properly addressed, would enhance the destination's product and experience offerings. Within the leisure segment, there is a strong need for enhanced brand awareness of the destination, and the creation of dynamic experience offerings through the development of partnerships and packaging amongst a variety of unique tourism owners and operators. Bringing regional tourism stakeholders together in a unified way and encouraging them to work together to develop more elaborate products and experiences remains one of Explore Waterloo Region's primary goals. Enhancing the overall product offerings of the region will play a key role in increasing the length of stay in the destination, thereby benefiting more businesses and encouraging further development.

With respect to the business events market, the destination possesses much of what meeting planners are looking for in a mid-size destination, but lacks a purpose-built conference centre that would provide the foundation of a compelling business events destination. This facility could be geared to offer the latest in innovation and

Waterloo Region

technology appealing to North American corporations and associations within the tech sector.

A recently completed Sport Tourism Assessment Tool (STAT Pro) has identified opportunities to enhance existing, and develop new, sport hosting facilities that would help to attract additional provincial and national sport competitions to the region, and enhance the quality of the recreation infrastructure for residents.

Brand recognition and compelling product and experience offerings are obviously key components to the success of any destination, and so is the ability of visitors to access, travel throughout, and eventually depart the area with relative ease and convenience. Waterloo Region is fortunate to enjoy the marketable advantage of being located less than one hour away from the largest visitor market in Canada, and not a great deal longer from its secondary markets within Southern Ontario. Waterloo Region also possesses air access to and from markets such as Toronto, Vancouver, Calgary, Edmonton, Montreal and sun destinations in the winter, through a progressive regional airport. Nonetheless, there are opportunities to improve air connections and frequency, rail connectivity to and from the GTA, and LRT links within Waterloo Region to key tourism attractions and facilities that are not currently serviced by this link.

The visitor economy in Waterloo Region performed at a relatively steady level over the 2015 – 2019 period. The COVID-19 pandemic, as was the case in the vast majority of urban Canadian destinations, seriously affected the Waterloo Region visitor economy and slowed visitation levels significantly. However, the region's 2022 aggregate hotel occupancy sits at 90% of 2019 levels, suggesting a strong recovery in demand.

Waterloo Region has historically maintained a relatively stable visitation level, growing at an annual compounded rate of just under 1% over a five-year pre-COVID-19 period. Given this steady base of business, there is certainly an opportunity to grow all segments of the visitor economy with a strong and focused industry-led plan.

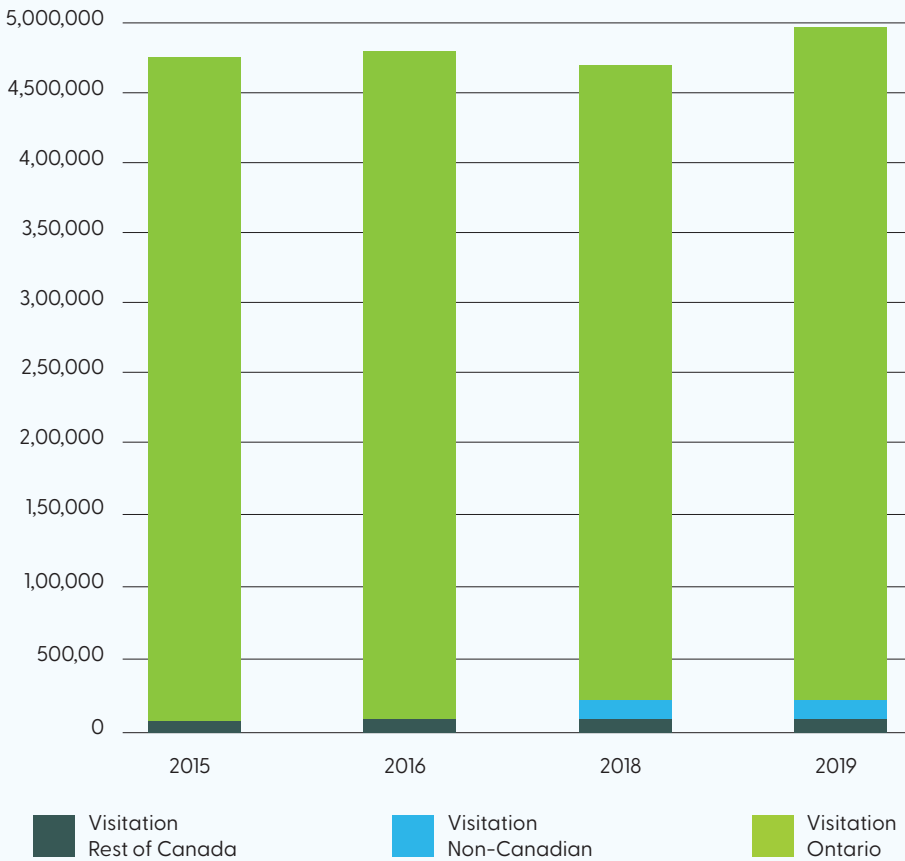
Visitation from the rest of Canada is led by travelers from Quebec, and those from outside of Canada are primarily from the US.

“The Waterloo Region is a major part of our RTO and drives significant visitation coming into the region. Continued investment in the region's tourism products and experiences will certainly have a positive effect on the overall visitor economy.”

Andrea Gardi, Executive Director– RTO4

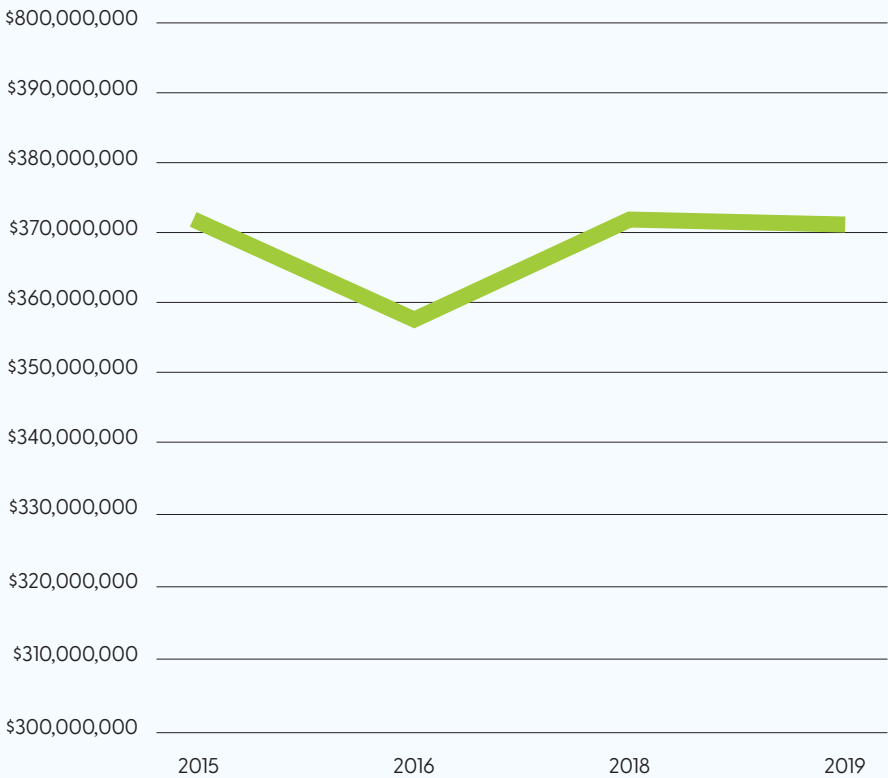
Waterloo Region

Visitor Volumes



Source: Statistics Canada. 2017 statistics unavailable

Visitor Spend Volume



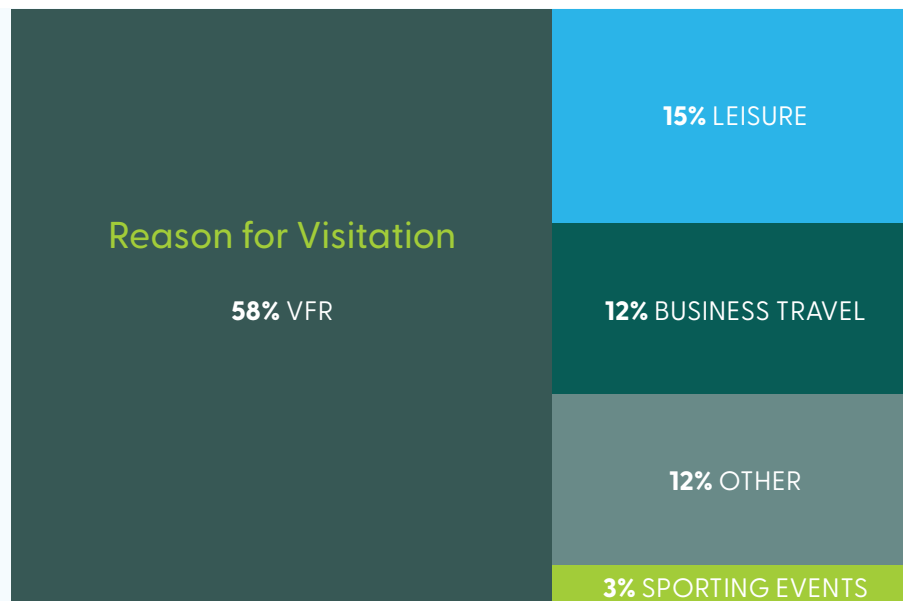
Waterloo Region

Based on 2019 statistics, 96% of Waterloo Region's visitor volumes come from the province of Ontario.

Among visitors, 58% are in the region visiting family and friends, with 15% of visitors coming for leisure experiences, 12% for business purposes and 3% for sporting events. Waterloo Region accounts for just under half of all visitation to the RTO4 region.

High travel demand for the GTA and subsequent pricing increases have caused some Ontario-based markets and organizations to consider alternative destinations within the province, whether it be

leisure travelers looking for a couples retreat or family vacation, or a provincial association meeting planner looking for more affordable and culturally-unique conference destinations. This represents opportunities for Waterloo Region and Explore Waterloo Region, given the region's immediate proximity to the GTA and the breadth of its product and experience offerings as a more affordable alternative.



	RTO4	Waterloo Region	% RTO4
Total Household/Party Visits	7,948,062	3,718,484	47%
Total Person Visits	10,427,724	4,968,663	48%
Overnight	2,134,678	880,541	41%
Same-day	8,293,046	4,088,123	49%
Avg. nights (among overnight visitors)	3.73	4.5	
Origin: Ontario	96%	96%	97%

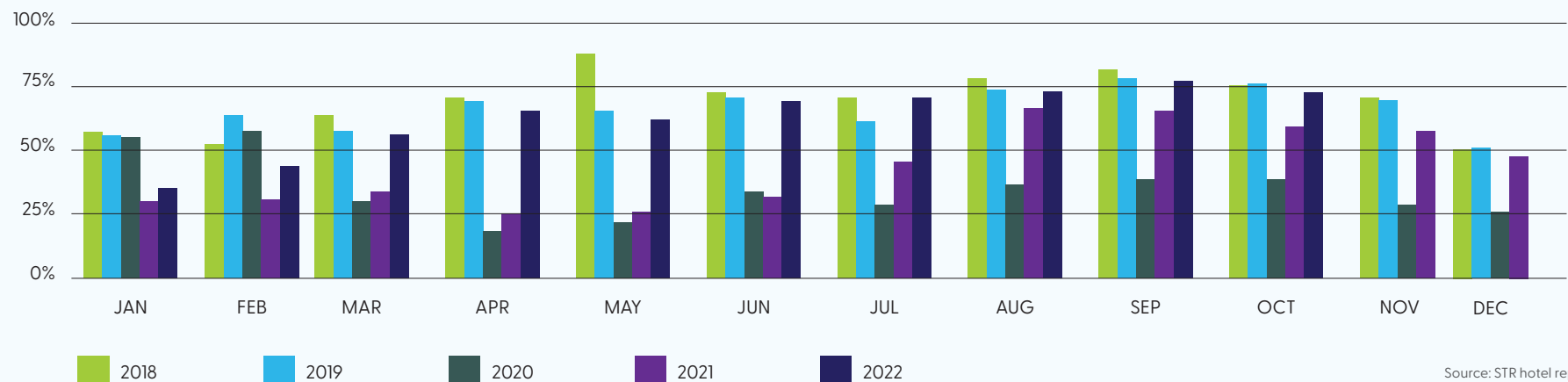
Waterloo Region Hotel Statistics

The hotel occupancy chart below illustrates Waterloo Region's unique position, in that overnight stays are relatively steady throughout the year, which is certainly not the case in most Canadian cities.

This lack of peaks and valleys (high and low season) speaks to the vibrant business environment in the region which maintains a base volume of business on which to grow overall future visitation.

As was the case in many destinations across Canada, the Region's 2022 occupancy was quick to return to pre-pandemic levels

Hotel Occupancy by Month



Tourism Trends Impacting Waterloo Region

Domestic travel

Domestic travel continues to be popular among Canadian travelers. Uncertainty abroad, increased prices, a looming recession and price sensitive travelers are all driving shorter haul travel options within Canada.

Sport tourism

Sport tourism is the largest growth sector in the tourism industry and has led recovery post-pandemic. Through the attraction and hosting of sport events, destinations can build business and reputation that supports the brand, while delivering valuable social benefit.

Regenerative travel

Travelers are more conscious of their footprint when traveling today and are looking for a deeper connection with locals and unique elements of the destination. Engaging with visitors to take part in the local economy while being respectful of its environment and culture is the key to regenerative travel.

Wellbeing

Health and wellness has taken on a higher profile in a post-pandemic era. Trails, parks, and soft adventure activities have gone from niche to mainstream. Destinations offering these types of experiences and products are well positioned to gain market share.

Indigenous tourism

Indigenous experiences continue to gain popularity with domestic and international travelers. DMO's are now working with First Nations to incorporate their history, culture and traditions into a destination's offering and storytelling, done with respect and sensitivity.



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Stakeholder Engagement

Stakeholder Engagement

In order to properly assess and guide the process of developing Waterloo Region's Tourism Master Plan, an extensive engagement process took place with over 100 tourism entities, municipal authorities, economic development agencies and related partners.

Through in-person visioning sessions (one specific to the sports market) and online interviews, a comprehensive picture of the present state of the region was assessed, as well as a vision of future success through brainstorming exercises.

Four questions were asked of the participants:

1. What is the region's true DNA? What makes Waterloo Region unique and competitive compared to other destinations?
2. What does future success look like by the end of the planning period (2030)?
3. Where are the greatest opportunities within Waterloo Region to advance tourism?
4. What are the challenges facing future growth of tourism in Waterloo Region?

The sport tourism session asked:

1. What is your vision for sport tourism in Waterloo Region?
2. Why sport tourism?
(What impacts lead to future success for the region?)
3. Who makes up the sport tourism sector in Waterloo Region and what are the roles for each?

The themes on the next page arose from these engagements and helped to form the Strategic Direction of the plan.

“Waterloo EDC works closely with Explore Waterloo Region to ensure the region continues to attract new and innovative tourism products and experiences in an effort to encourage growth of our visitor economy.”

Tony LaMantia, President & CEO- Waterloo EDC

Opportunities

Access

- Waterloo Region's proximity to the GTA and southern Ontario markets, Canada's biggest feeder markets
- Well developed access. A progressive regional airport with established daily flights and potential to grow further. A direct highway access corridor (H-401) to major feeder markets. A GO train link and intercity LRT system aimed at better scheduling and expansion
- Take a regional approach for visitor services. Wayfinding, digital services, cross promotions of all towns

Partnerships

- A willingness on behalf of municipal authorities and economic development agencies to work toward a stronger visitor economy. An all-regional approach to tourism
- The region's centre of excellence being Canada's major technology hub; ability to bring year-round business and new tech-oriented events (esports)
- Well established business and academic community; ability to generate interest for business events
- Communicating the value of the visitor economy to the local communities in order to grow tourism knowledge and participation in the storytelling of the region

“The tourism industry is vital to Waterloo Region's economic success and future growth. Our region continues to attract people from around the world thanks to the strength and brand of our post-secondary institutions, technology industry, and rich cultural heritage.”

Karen Redman, Chair- Region of Waterloo

Opportunities

Product

- Create an offering that showcases the value of three urban environments in close proximity to four rural townships, leading the way for a variety of possible experiences
- Leverage soft adventure with existing natural assets and incorporate a regenerative offering with a low impact entry level (trails, the Grand River, biking, winter sports, Chicopee, horseback riding)
- Several well-known locally owned and well-established tourism experiences, and in many cases unique, that can be leveraged to anchor a broader and longer stay offering (Oktoberfest, St. Jacobs, Blues Fest, Bingemans, Ribfest)
- The live theatre and arts scene (fashion history, symphony, museums) as a niche product
- Develop and highlight more culturally unique experiences within the Mennonite, German and Indigenous communities
- Grow the culinary scene with “Feast” certified restaurants that tie into a local farm to table supply. Highlight the local brewery industry and farm visits
- Leverage the St. Jacobs market for events and further product developments within the site (festivals, events, new quality retailers)
- Invest in 4 star+ downtown accommodations to increase overall inventory and help with business event attraction
- Upgrade of sports facilities within the region to bolster sport hosting opportunities and pursue key sports for the region
- Look to new opportunities such as esports, tech-oriented events, larger scale public events to draw overnight visitation

Challenges

Access

- Connectivity within the region (public transport, trails, rentals)
- Frequency/scheduling of train connections to and from the GTA

Product:

- Lack of Waterloo Region brand awareness. Waterloo Region is seen through the lens of a few marquis events or as a day trip from GTA
- Visitor economy not always recognized by local governments as a major economic driver for the region
- Lack of a purpose-built business events venue (within a hotel or as a stand-alone venue) to attract a larger and more frequent business events market
- Sports facilities are in need of upgrades in order to compete on a national level and attract more sporting events year round
- Limited 4-star hotel inventory within downtown, hindering the capability to attract more business events
- Need for more culturally unique tourism products and experiences in the region (Indigenous, Mennonite, German cultures, etc)
- Limited leisure market offerings year round

Partnership:

- Aligning several municipal bodies with one Strategic Direction for tourism in the region
- Tapping into the local market/citizens to participate in Waterloo Region's tourism story (students, residents). There is still some resident push back on tourism, indicating a lack of awareness of tourism's economic and community benefits. In need of a more welcoming nature in certain parts of the region
- Competing Ontario regions are investing in tourism-related products and initiatives
- Labour force shortages continue to affect the tourism industry



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Gap Analysis

Gap Analysis

The following gap analysis was conducted based on the present product inventory of the region as compared to other competitive destinations in Ontario, as well as stakeholder interviews and feedback (tourism stakeholders and municipal authorities).

Hotels

The region presently has 32 hotels in the region with a total of 2858 bedrooms. There are only 3 hotels in the region that can be considered at the 4-star level (Langdon Hall, the Walper and Delta) which appeal to the business and meeting segment. Within the downtown area (Kitchener, Waterloo) there are only 2 hotels considered 4-star, with a total of 286 rooms. Accordingly, there is a need for more high-end hotel rooms within the region that could host larger business events and offer upgraded services.

Meeting venues

There are 4 business events meeting venues in Waterloo Region: the Delta hotel, the Crowne Plaza hotel, Tapestry Hall and Bingemans Conference Centre. Both the Delta (6337 sq ft) and Crowne Plaza (15,000 sq ft) are limited in their total square footage and breakout capacity. Bingemans (40,000 sq ft) offers the largest meeting space in the region but is better suited for large social events and trade shows and less so for business events seeking an array of breakout rooms. As well, there are no hotels within close proximity of this venue, requiring a 15 minute drive to the downtown area.

Destination	Population	# of Hotels	# of Hotel Rooms
Waterloo Region	571,000	32	2858
London	404,699	39	3504
Hamilton	579,200	22	2000
Kingston	136,685	40	2725

Source: STR – October 2022 report

Gap Analysis

Brand awareness

Although Waterloo Region is well recognized as the centre of innovation in Canada, it is not as well known for its tourism offerings. Although its most recognized tourism event, Oktoberfest, has a well-established history, other events and experiences have not gained the same traction. This has limited the ability of the region to grow its leisure market and in turn to generate a longer length of stay.

Alignment

Although the region's tourism stakeholders understand the contribution of the visitor economy to the region's growth potential, there has been a lack of a common tourism vision for the region. Due in part to the region's diversity, there is an ample array of experiences, both urban and rural, that can be leveraged to create a more complete offering, attract visitation and extend the stay. Municipal authorities generally recognize that tourism can play an important role in the economic prosperity of their individual municipalities, however, a consistent regional approach to tourism has yet to be fully embraced.

Sport hosting

Waterloo Region is well known for its capabilities to host sport tournaments. Nevertheless, it is facing greater competition from other Ontario and Canadian destinations that have also adopted a targeted sports hosting strategy. The recent STAT – Pro assessment has placed Kitchener in 18th place in cities with populations between 150,000-500,000 and 56th overall in Canada. Cambridge was ranked 28th and 112th respectively. Areas of improvement are related to marketing, event attraction strategy and evaluation process, and a need for facilities upgrading.

Resident attitude towards tourism

Leading tourism destinations have enlisted the local resident population to play an active role in not only being a tourist in their own region, but also understanding the impact that a vibrant visitor economy has on the overall prosperity of their city or region... ergo, encouraging residents to play an active role within the local tourism story. Waterloo Region has yet to fully tap into this strategy, leading to a certain degree of resident resentment towards tourism impacting their towns, as has been experienced in St. Jacobs.



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Tourism Segment
Growth Opportunities

Tourism Segment Growth Opportunities

Leisure visitation

(GTA, Southern Ontario, rest of Canada)

-
- Weekend and weekday
 - Food and beverage
 - Shopping
 - Soft adventure
 - Family getaways
 - Festivals
 - Arts and culture

Sporting events

-
- Amateur tournaments
 - Provincial and national championships
 - International training camps and competitions
 - Sport business meetings
 - Indoor and outdoor

Business events

-
- Canadian corporate and associations
 - Business meetings
 - Conferences
 - Trade shows



Strategic Direction 2030

Strategic Direction 2030

Identifying a Strategic Direction is the first step in achieving the successful development and implementation of the Tourism Master Plan.

An ambitious Strategic Direction articulates a clear future state and leads to the development of associated Growth Pillars and strategic priorities that make up the essence of the plan. In the case of the Waterloo Region Tourism Master Plan, stakeholder and client input and onsite observations were invaluable in determining the desired future state of the destination, and the subsequent identification of the five Growth Pillars. The Strategic Direction 2030 statement describes a strong, dynamic and competitive destination.



Strategic Direction 2030

By 2030 Waterloo Region will be recognized as one of Ontario's most dynamic and connected destinations for the leisure, business events, and sport hosting markets. The region will offer products and experiences that reflect its unique blend of urban vibrancy and culturally unique rural settings, resulting in long-term growth of the region's visitor economy.

Goal: By 2030, achieve an annual growth rate in visitor spending that exceeds the growth rates of Waterloo Region's competitive set.





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Waterloo Region

Destination Growth Pillars and Strategic Initiatives

Destination Growth Pillars & Strategic Initiatives

Explore Waterloo Region will play a leading role in coordinating the implementation of the Tourism Master Plan.

Nevertheless, as the plan takes a holistic approach to tourism and experience development for the entire region, its success will rely greatly on an active participation of tourism stakeholders as well as municipal and regional partners, economic development agencies, the business and academic community and residents.

Alignment and cooperation from all local parties will help solidify tourism's role as a major economic sector contributing to Waterloo Region's long-term growth and prosperity.

The Destination Growth Pillars identified in this plan act as guideposts to focus the Tourism Master Plan on the areas of greatest need and growth potential within Waterloo Region. The Growth Pillars represent key initiatives that will drive incremental growth of Waterloo Region's visitor economy, and ultimately the achievement of the destination's Strategic Direction 2030.



1. Brand

Grow Waterloo Region's brand in key markets and visitor segments as a dynamic destination to discover.

Explore Waterloo Region has been in the marketplace for several years but has not yet captured what the region has to offer in the way of compelling experiences, or the necessary traction to invoke a top-of-mind response from key target markets and visitor segments. Known more as a day trip destination the region is under-developed in the overnight leisure visitation segment. Waterloo Region needs to re-energize its brand in order to create a strong level of awareness of the region's offerings and an equally strong desire to visit.

Concentrating Explore Waterloo Region's marketing efforts in key markets while evolving the brand to resonate with customers will be a priority of this plan.

Strategic initiatives

- Ensure the Waterloo Region brand clearly resonates with targeted customer segments, creates a positive reaction and moves the customer down the path to purchase (Explore Waterloo Region & Waterloo Region Sport Hosting Office)
- Promote dynamic and market-responsive experience offerings in conjunction with stakeholder partners within the targeted leisure, business events and sport segments
- Focus Explore Waterloo Region's efforts on the GTA and Southwestern Ontario, with expanded investments in the brand narrative
- Promote Waterloo Region business events opportunities on a provincial, national and international basis, aligned with key sectors of excellence*
- Promote recognition of Waterloo Region as a major location for art, culture and festivals**,***
- Develop an ambassador/champions program to encourage development of business events opportunities

* Aligned with Waterloo Region Economic Development Strategy Goal 1

** Aligned with Waterloo Region Economic Development Strategy Goal 4

*** Aligned with RTO4 Business Plan

2. Product

Promote the growth and quality of leisure, business events and sport hosting product offerings and experiences that align with the region's history and reputation, and that reflect the buying potential of primary markets and visitor segments.

In order to continue to grow Waterloo Region's year-round visitor economy, the region must continue to add to its inventory of product and experience offerings in order to create demand. In addressing the gaps and needs of the region's tourism industry, municipal partners, economic development agencies, private sector investors and Explore Waterloo Region can all work together to promote and attract potential product development and move to enhance existing products and experiences.

Strategic initiatives – leisure

- Position Waterloo Region as Ontario's most dynamic Festivals & Events destination
- Become known as a hub for entry level soft adventure experiences in Ontario^{**,**}
- Encourage a cooperative environment among tourism stakeholders to address inventory gaps and develop experiences and products that align with targeted market segments
- Encourage a market driven outreach to new Canadians leveraging introductory soft adventure programs
- Promote strategic partnerships amongst the attractions, festivals, accommodation and transportation sectors aimed at developing year-round overnight stay experiences, with primary emphasis on summer months
- Encourage the region as an incubator for outdoor product development around iconic experiences already in place (venues, trails and paths, Grand River, markets)^{**}
- Develop local Indigenous cultural and tourism-related experiences. As well, engage with the Mennonite community on potential experiences^{***,****}
- Identify opportunities to attract new, innovative and high quality tourism businesses to Waterloo Region^{**,**}

* Aligned with Waterloo Region Economic Development Strategy Goal 1
 ** Aligned with RTO4 Business Plan
 *** Alignment with TIAO recommendations 2022 report
 **** Alignment with ITO Strategic Plan

2. Product

Strategic initiatives – business events

- Position Waterloo Region as Ontario’s most dynamic destination for small-to-mid size Ontario provincial associations conferences and corporate business events
- Leverage and align sectors of excellence within universities and the business community C-Suites to help promote and recruit business events**
- Explore a business case for the development of a mid-size state of the art conference and meetings facility in Waterloo Region
- Leverage leisure brand marketing to help attract business events and extend the length of stay

Strategic initiatives – sport hosting

- Position Waterloo Region as Ontario’s leading mid-size sport hosting destination**
- Implement recommendations issued from the STAT Pro report to advance Waterloo Region’s reputation as a sport hosting destination
- Encourage municipal authorities to identify and prioritize existing facilities that require improvements and/or expansions related to targeted sport events
- Continue to enhance the sports event attraction and hosting strategy with recommendations made in the STAT Pro report**

“One of our great strengths as a destination lies in the diversity of our geography and our people, and the unique blend of urban and rural vitality. These assets provide Waterloo Region with a tangible competitive advantage over other destinations.”

Tracy Van Kalsbeek, Executive Director- Uptown Waterloo Business Improvement Area

3. Access

Promote the alignment and connectivity of access and transportation options, in support of destination development and the growth of current and future markets.

Access into Waterloo Region is predominately by automobile. As more and more travelers look to use more sustainable means of transportation, Waterloo Region is well placed to leverage its transportation infrastructure to appeal to these demands.

Working together, transportation stakeholders in Waterloo Region have the potential to create a seamless option for both visitors and locals to travel to-and-from and within the region. The promotion of public transportation will be key to this but regional partners should also look to promote the walkability and cycling potential the region as a means of visiting the area.

* Aligned with Waterloo Region Economic Development Strategy Goal 2
** Alignment with TIAO recommendations report 2022

Strategic initiatives

- Align transportation stakeholders in a common vision (air, rail, LRT) to create the most efficient transportation system to meet the needs of visitors and residents*
- Increase and promote use of LRT to visitors through a sustainability lens
- Promote interconnectivity of primary attractions and facilities within the region**
- Support efforts to increase daily flights into YKF from key feeder markets**
- Encourage efforts to expand Via Rail / GO train service into the region from the GTA and Southwestern Ontario.
- Align partner municipalities to develop a common regional tourism wayfinding strategy (physical and digital)**

4. Sustainability

Grow the regenerative nature of Waterloo Region's tourism offering through the development of product and experiences that reflect sustainability, and the respectful inclusion of the region's history, culture and Indigenous communities.

Sustainable tourism practices are no longer a “nice to have” option. Customer sentiment on this subject is now starting to strongly influence travel decisions. Encompassing “whole of the region” tourism offerings as well as the integration of Indigenous and cultural heritage will enhance the region's appeal, disperse visitors regionally and help extend the length of stay.

“Tourism plays a key role in the economic prosperity within our Region, especially within the rural tourism experience. Locally, by promoting farmers markets, eco-tourism activities, and the rural lifestyle we strive to not only attract visitors but to establish long term connections within our local tourism industry.”

Mayor Sandy Shantz, Mayor- Woolwich Township

Strategic initiatives

- Position Waterloo Region as a well-recognized sustainable tourism destination
- Work with the Mennonite and Indigenous communities to increase efforts to advance their tourism experiences and products**
- Promote the growth and vibrancy of Waterloo Region's agribusiness and agri-food farm-to-table sector*
- In cooperation with municipal partners promote alignment of stakeholders and residents alike to support sustainable tourism practices
- Support efforts to expand Via Rail / GO train service into the region from the GTA and Southwest Ontario in order to ease dependency on automobile traffic***
- In conjunction with municipal and industry partners, ensure a practice of viewing tourism development opportunities through a sustainability lens

* Aligned with Waterloo Region Economic Development Strategy Goal 3

** Aligned with ITO Strategic Plan

*** Alignment with TIAO recommendations report 2022

5. Communications & Alignment

Align Waterloo Region's municipal, business and resident communities regarding tourism growth initiatives that serve to improve the quality of life throughout the region, while communicating the importance of the visitor economy as a leading growth sector.

As the Tourism Master Plan will depend on the cooperation and participation of a vast array of stakeholders, it is important to ensure that all parties are aligned on initiatives, and aware of the tourism industry's significant contribution to the region's economic wellbeing and resident lifestyle. All entities will play a role in establishing Waterloo Region as a viable and sought after tourism destination, leading to a strong and vibrant visitor economy and quality of life.

Strategic initiatives

- Work with Municipal and Economic Development entities to build recognition of tourism, amongst municipal governments and the business and resident communities, as a major economic sector that supports a healthy, growing economy*
- Create integrated communications strategies aimed to inform:
 - Tourism stakeholders (data, results, initiatives)
 - Municipal partners (data, results, initiatives, impact)
 - Residents (initiatives, activities, impact)
- Track and report employment gains in Waterloo Region's growing tourism sector**
- Ensure a regional approach to tourism product development and marketing***
- Initiate a tourism data collection process to measure and support the tourism industry's economic and societal contributions***
- Encourage partner municipalities to identify regulations that may hinder tourism development, and address as needed
- Create subcommittees comprised of industry stakeholders and board members (leisure, business events, sport hosting) to guide Explore Waterloo Region on market trends and strategies
- Track and report on the economic value and benefits of sport hosting

* Aligned with Waterloo Region Economic Development Strategy Goal 3

** Aligned with Waterloo Region Economic Development growth target

*** Aligned with RTO4 Strategy



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Waterloo Region

Key Performance Metrics

Key Performance Metrics



Statistical

- Visitor spending increase by segment
- Economic impact targets
- Increase in length of stay and yield
- Marketshare performance versus competitive set
- Partner data collection cooperation and alignment

Financial

- Additional revenue sources
- Deployment of resources

Marketing

- Yearly business plan KPI's
- Partner participation initiatives
- Digital marketing effectiveness
- Partner alignment

Product

- Product development targets
- Customer satisfaction
- Increased access
- Partner cooperation in experience/product development



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Waterloo Region

Appendices

Methodology

In order to create the Tourism Master Plan, the consulting team conducted both desk and field research to determine the present state of tourism in Waterloo Region.

Data on visitation and targeted markets and segments was analyzed, a Gap Analysis was conducted as well as on-site visits to all major tourism products and experiences where owners and operators were met. The consulting team looked at best practices in similar size competitors and established benchmarks which Waterloo Region could look to incorporate in the future.

In total, 132 stakeholders from Waterloo Region were interviewed and/or took part in sessions. Participants were questioned on their impressions of:

1. Waterloo Region's true DNA. What sets it apart from its competition?
2. The tourism opportunities within the region
3. The challenges within the region that may hinder tourism's advancement and development
4. What does success look like for this plan?

Phase two consisted of one-on-one or small group virtual meetings held from October to December, engaging with the Mayors of each city and township, tourism stakeholders, municipal authorities and economic development agencies. An additional 69 stakeholders were interviewed.

The sport tourism session engaged with 9 stakeholders and the following questions discussed:

1. What is Your Vision for Sport Tourism in Waterloo Region?
2. Why Sport Tourism? (What Impacts Lead to Future Success for the Region?)
3. Who makes up the sport tourism sector in Waterloo Region and what are the roles for each?

Once the stakeholder engagement and research process was completed, the team validated the findings and elaborated an overall Strategic Direction for the plan supported by Growth Pillars and strategic initiatives. Key performance indicators have also been implemented to ensure the continued monitoring and success of the Tourism Master Plan.

Tourism Partner Defined Roles

Waterloo Region Tourism Stakeholders

- Offering and creating new unique tourism products and experiences
- Working with other tourism stakeholders to improve overall offerings appeal of the destination
- Playing an active role in promoting the region as a tourism destination within targeted markets
- Welcoming visitors with warmth and hospitality
- Maintaining their products and experiences to a high standard of market readiness
- Promoting tourism as a major economic sector for the region
- Advocating with Explore Waterloo Region and partners on issues that will increase the regions tourism appeal (better access, tourism development, sustainability, training, additional funding)
- Supporting Explore Waterloo Region in its efforts to increase visitation and the destinations brand recognition

Destination Canada (national tourism marketing organization)

- Promoting Canada in major international feeder markets (sales & marketing)
- Creating marketing opportunities for provincial and city DMO's and tourism partners
- Collecting and distributing business intelligence to tourism stakeholders across Canada
- Working with tourism partners across Canada to develop new tourism products and experiences to market
- Generating opportunities for cities across Canada for business events, major events and media opportunities

Region of Waterloo International Airport

- Local airport servicing both domestic air travel and leisure international air service
- Working with Waterloo Region, Explore Waterloo Region and economic development agencies to attract additional air connections to Waterloo Region

Destination Ontario (provincial tourism marketing organization)

- Promoting Ontario in major international and domestic feeder markets (marketing)
- Creating marketing opportunities for Ontario tourism partners
- Collecting and distributing business intelligence to tourism stakeholders across Ontario
- Working with tourism partners across Ontario to develop new tourism products and experiences to market
- Generating opportunities for cities across Ontario for major events and media opportunities

Tourism Industry Association of Canada

- A national advocacy association for the tourism industry acting at the federal government level
- Collecting and distributing business intelligence to members
- Working with provincial counterparts to educate on the benefits of the visitor economy

Tourism Industry Association Of Ontario

- The provincial advocacy association for the tourism industry acting at the provincial government level
- Collecting and distributing business intelligence to members
- Working with TIAC and other provincial counterparts to educate on the benefits of the visitor economy

Regional Tourism Organization 4 Inc.

- The regional tourism body representing Waterloo Region, Wellington County, Perth County, Huron County
- Creating synergies between the regions on development opportunities, tourism direction, training and networking between tourism stakeholders
- Advocating on behalf of the region at the provincial and municipal level
- Coordinating improved transportation links and schedules into the region

Tourism Partner Defined Roles

Indigenous Tourism Ontario

- Association committed to advancing Indigenous tourism product development and training in Ontario
- Working with regional and municipal DMO's to help integrate Indigenous products into tourism offerings and marketing
- Advocating on behalf of Indigenous tourism businesses in Ontario

Waterloo Region Sport Hosting Office

- Part of Explore Waterloo Region
- Sport hosting bidding and accompaniment
- Venue selection and access and coordination between municipal entities
- Customer sales and host recruitment
- Partner relations and alignment on sport strategy
- Developing volunteer network and communications

Waterloo Region Economic Development

- Economic development agency for the region enticing business development
- Investor attraction in all relevant sectors including tourism
- Investment strategy alignment throughout the region
- Talent recruitment
- Coordinating improved transportation links and schedules into the region

Greater Kitchener-Waterloo Chamber of Commerce

- Encouraging business sector networking
- Encouraging new business development including tourism sector businesses
- Training and education in the business sector
- Recruiting talent
- Community advancement

Cambridge Chamber of Commerce

- Encouraging business sector networking
- Encouraging new business development including tourism sector businesses
- Training and education in the business sector
- Recruiting talent
- Community advancement

Uptown Waterloo/BIA's

- An association of business owners in the downtown Waterloo sector
- Promoting and organizing events and promotional activities in the downtown core to increase visitation and spend from tourists and locals
- Beautification of the area
- Business training

University of Waterloo Wilfred Laurier University Conestoga College

- Encouraging thought leaders to act as possible tourism ambassadors within their sectors to help attract business events
- Availability of campus venues for business events and major events attraction
- Sport hosting

Key Measurement Metrics Dashboard

Statistical

Visitor spending

- Statistics Canada data
- Business events evaluation data
- Events evaluation data
- Sports hosting Sport Tourism Canada evaluation formula

Economic impact

- Statistic Canada data
- Year end reporting impact formula

Length of stay

- Statistics Canada data
- Hotel reporting data
- Geo-location data

Marketing

Yearly plan KPI's

- Visitor growth
- Increase in visitor spend
- Hotel occupancy growth
- Program ROI's

Partner participation initiatives

- Program participation by partners
- ROI on programs
- # of new partners per year

Digital marketing initiatives

- Online statistics
- ROI of initiatives
- Social media views

Key Measurement Metrics Dashboard

Financial

Additional revenues sources

- Partnership opportunities
- Marketing programs
- Sponsorships
- Grants
- In-kind

Deployment of resources

- Program ROI's
- Partner/Waterloo Region investment ratio
- Sales activities ROI

Product

Product development

- Expansion of existing products (new offers, experiences, upgrades)
- New products and experiences in market
- Product pipeline, 10-year forecast

Customer satisfaction

- Yearly survey
- Partner data sharing (events, sports tournaments, attractions, hotels)

Increased access

- Geo-location data
- Improvements in train scheduling
- New flights, schedules and destinations
- Bus and LRT connectivity
- Improvements in inter-regional connectivity
- Ontario Transportation traffic data

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Waterloo Region (population 571,000) considers the following Ontario destinations as primary competitors within the visitor economy, when considering existing and potential feeder markets.

City	Population	Competitive Market Segments
Niagara Falls	94,400	Leisure, Business Events, Festivals
London	405,000	Leisure, Business Events, Sports
Huntsville	20,000	Leisure, Sports
Guelph	135,000	Leisure, Sports
Kingston	137,000	Leisure, Business Events, Sports
Ottawa	1.05 million	Leisure, Business Events, Sports, Festivals
Prince Edward County	25,000	Leisure

Acronyms

ADR	Average Daily Rate (hotels)	KPI	Key Performance Indicator
BIA	Business Improvement Association	LRT	Light Rail Train
CAO	Chief Administrative Officer	MAT	Municipal Accommodation Tax
CDN	Canadian	NAT'L	National
COO	Chief Operating Officer	ROC	Rest of Canada
DMO	Destination Marketing Organization or Destination Management Organization	ROI	Return on Investment
DNA	The unique identity of the region. Its attributes and character as it relates to appeal and competitiveness	STAT	Sports Tourism Assessment Template
GTA	Greater Toronto Area	SW	Southwest or Southwestern
INT'L	International	SWOT	Strengths, Weaknesses, Opportunities, Threats
		VFR	Visiting Friend and Family



EXPLORE
Waterloo Region



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