



Operational Review of Tourism Services

A Report from:
GGA • Management Consultants
&
TCI Management Consultants
May 1, 2014

GGA • Management Consultants & TCI Management Consultants

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May 1, 2014

Ms Colleen Clack
General Manager, Culture & Tourism
City of Guelph
City Hall
1 Carden Street
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Dear Ms Clack:

Operational Review of Tourism Services: City of Guelph

We are pleased to submit our final report on the Operational Review of the City of Guelph's Tourism Services. We believe that our recommendations, if implemented, can contribute to an improvement in tourism services delivery and help the City of Guelph to attract visitors and realize the associated economic benefits.

We would like to thank the Supervisor, Tourism Services Stacey Dunnigan and staff for their help and assistance with our review and research. We would also like to thank the many stakeholders in Guelph's tourism sector who provided us with their thoughts and ideas through out interviews and online survey on the City's tourism services and how to best support the tourism sector and visitor attraction. Also, we would like to thank the representatives from Tourism London, Tourism Barrie, Tourism Brantford, the Kingston Economic Development Corporation and Chatham-Kent Tourism for their help with our benchmarking research and their helpful suggestions and observations.

Finally, we would like to thank our Project Oversight Committee of Peter Cartwright, General Manager Economic Development, Derrick Thompson, Executive Director, Community & Social Services, Loretta Alonzo, Internal Auditor and yourself for the constructive review and feedback at key points in the review process.

We appreciated very much the opportunity to be of assistance to the City of Guelph in this important operational review of tourism services.

Yours truly,



Gerald A. Grant
GGA • Management Consultants



Jon Linton
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Guelph Tourism Services Operational Review

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Operational Review of City of Guelph Tourism Services

Executive Summary

The City of Guelph recognizes that tourism is a key sector of its economy and that the City's heritage, educational, recreational and cultural assets can provide visitors with many opportunities for enrichment, entertainment and recreation. The City has been giving consideration to the types of tourism support services and the manner in which these services should be delivered to increase the number of visitors and the length of their stays in the community.

To this end, the City commissioned GGA • Management Consultants and TCI Management Consultants to undertake an Operational Review of the City's Tourism Services. This report summarizes our Assessment and Recommendations.

Operational issues and possible delivery models were considered through the following information-gathering and research:

- a review of previous planning documents, organization charts, job descriptions and budgets
- interviews with Tourism Services supervisor and staff
- interviews and an online survey with external industry partners and stakeholders
- review of Tourism Services organization, management and staff roles, budgets / expenditures, business practices and customer service
- interviews with City of Guelph departmental managers whose departments have involvement with Tourism Services relative to roles, responsibilities and coordination
- benchmarking / best practices research and interviews with 5 comparable municipalities regarding their tourism services delivery: London, Barrie, Brantford, Chatham-Kent and Kingston. (These 'benchmarking communities' were agreed upon with the Steering Committee for the project)

Tourism Sector & its Economic Benefits to Guelph/Wellington

The tourism sector includes business and organizations involved in:

- Accommodation, e.g. hotels, motels, B&Bs
- Food and beverage, e.g. restaurants, bars, breweries, wineries
- Recreation and entertainment, e.g. museums, festivals and events, performing arts centres, sporting events, etc.
- Shopping and services
- Transportation, e.g. local and regional transit – bus, taxi, rail

The tourism sector provides significant economic benefits to the City and the County, as follows:

- 10.7 million person visits annually (2011 stats)
- Visitor spending estimated to be \$171.8 million/year (see Appendix 1 [Economic Impact] for a discussion of the methodology used to develop this estimate)
- This level of expenditure is associated with the creation of \$108.7 million of Gross Domestic Product (GDP - the value of all associated goods and services) generated in the County
- 2,023 jobs and \$67.9 million in wages and salaries in the County; and \$54 million in taxes generated to all levels of government

Guelph's Tourism Services

Guelph Tourism Services provides services which help to attract visitors and provide them with useful information to help them to enjoy their stay within the City. These services include:

- Tourism Marketing and Promotion

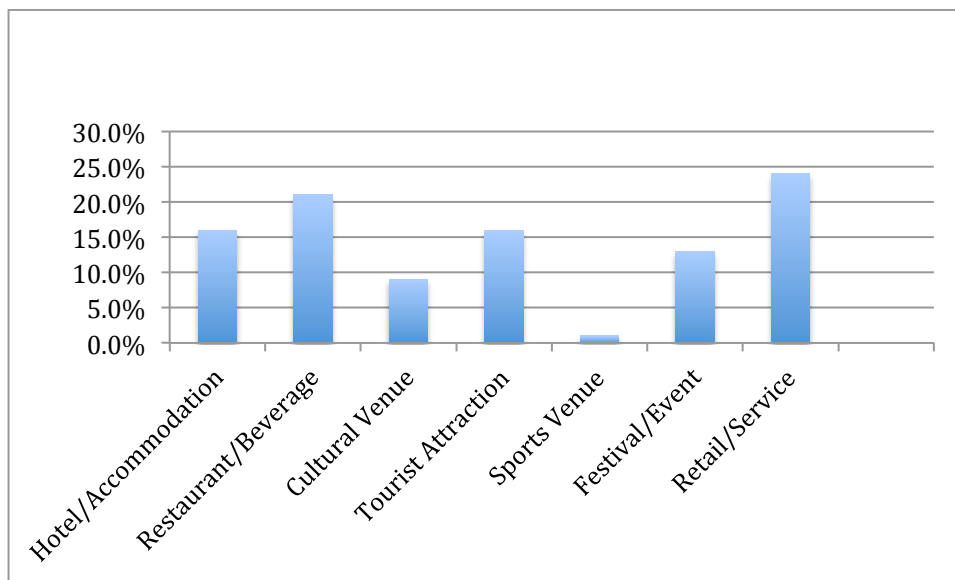
- Tourism Product Development
- Partnerships and Member Services
- Communications, including information services provided by the City Hall Tourist Information Centre, the “Visit Guelph” website, and use of social media to attract and assist visitors

Tourism Stakeholder Perspectives on Guelph Tourism Services

In order to obtain Guelph Tourism Services’ stakeholder views on the services being provided, their effectiveness and the challenges faced by the tourism industry in Guelph, interviews and a survey were conducted with Guelph tourism businesses and organizations. Interviews were held with representatives from the Downtown Guelph Business Association, Chamber of Commerce, individual hotels and B&Bs, Hillside Festival, Guelph Dance Festival, University of Guelph, amongst others. A stakeholder survey was also developed and posted online and an information notice was sent to all Guelph tourism industry partners / members (141) and to the Chamber of Commerce and Downtown Guelph Business Association so their members could complete the survey as well. A total of 55 surveys were completed, of which 39 were completed by respondents who are Guelph Tourism Services members, and the rest were non-members - a good response for an industry survey of this type. The responses to the online survey were similar and complementary to the views as expressed by stakeholders in their interviews.

The respondents to the survey represented a broad cross-section of Guelph businesses and organizations involved in the tourism sector, as can be seen in the chart following:

Chart: Type of Business – Survey Respondents



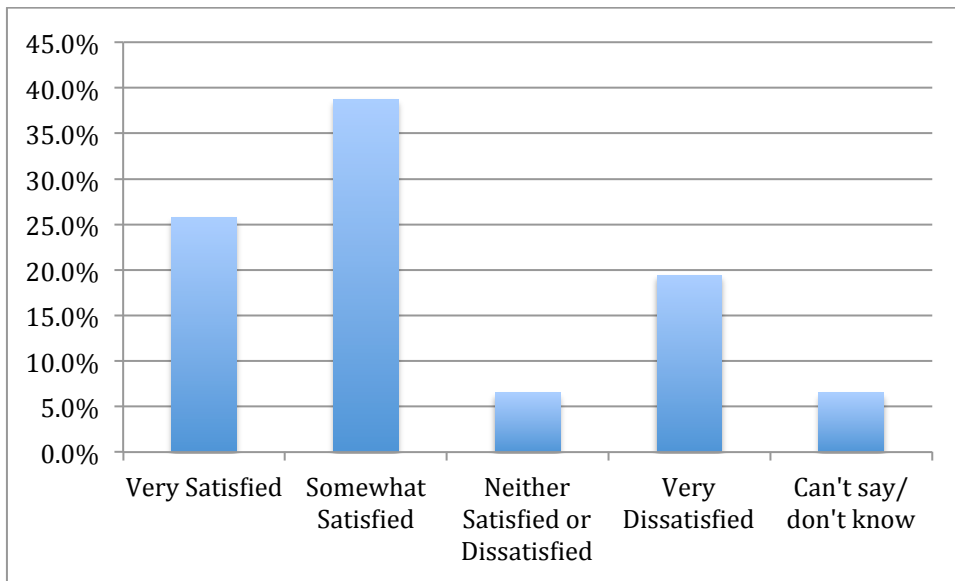
** note that 50 respondents answered this question*

98% of the respondents were located in Guelph and Wellington County. 75% of the industry respondents had under 25 employees and less than \$1m in sales. 23% had 50 – 100 employees or more. 71% were current Guelph Tourism Services members or partners who had paid fees, the remainder were Guelph businesses or organizations which were not. 70% of the respondents reported having made use of or benefited from Guelph Tourism Services in the past.

Majority of Stakeholders Generally Satisfied with Services provided by Guelph Tourism Services

When asked their level of satisfaction with the services provided by Guelph Tourism Services, of those who responded to this question 65% reported that they were very satisfied or somewhat satisfied with the services provided, while 23% were somewhat dissatisfied or very dissatisfied (see following chart).

Satisfaction with the Services Provided by Guelph Tourism Services



* 23 respondents answered this question – but note as per above that only 39 survey respondents were members of Guelph Tourism

Stakeholders Have a Range of Views on the Organization & Governance of Tourism Service Delivery

Tourism stakeholders had a range of views concerning the manner in which tourism services should be organized and delivered. As noted earlier, the majority of the respondents and those interviewed were generally satisfied with the tourism services as currently provided through the current Guelph Tourism Services municipal organization and would like to see these continue. There were some who indicated that they would like to see an independent organization delivering tourism services, e.g. non-profit industry organization, existing community organization or private company. Generally, private for-profit tourism businesses would favour more direct industry involvement in tourism services and decision-making. Non-profit tourism organizations, e.g. festivals and events, on the other hand are concerned that their contributions to tourism revenues are not being recognized by the private sector and would like to see more support from the municipality and recognition by business of their contribution to industry revenues.

Many expressed concerns regarding the location of the Tourist Information Centre in City Hall, its lack of visibility and lack of effectiveness in bringing tourists downtown. They view it as not prominently located and visible, nor is it located at one of the gateways to the City.

Stakeholders Want Funding & Ongoing Municipal Support for Tourism Services

A majority of those interviewed and survey respondents stated that there should be ongoing municipal support for the provision of tourism services. This was the case whether the services were to be provided as they are now by the municipal organization, or if the services were provided by a private non-profit industry-run organization or other organizational arrangement. There was a concern expressed by some that current municipal funding was inadequate and was not assured looking to the future.

Increased Stakeholder Engagement, Communications & Networking Desired

Many stakeholders indicated that they believe that more direct involvement with Tourism Services would be beneficial. This would include involvement in planning and decision-making via a board or committee; participation in networking and information-sharing events, and involvement in the development of new products and services, amongst other activities. They also believe that Tourism Services, working with others in the tourism sector, could be an advocate within the City with other levels of government to address infrastructure and other needs which would be

of benefit to the sector. They also indicated that Guelph Tourism Services needs to expand its community outreach and communications and make use of social media to support these activities.

Priority Tourism Services which are Valued by Stakeholders

Branding, advertising and promotion, product development, market research, support for entrepreneurship and assistance to new and small tourism-oriented businesses were the tourism services which would be most valued by stakeholders. Services to support labour force development, management development, quality assurance, industry investment attraction, and consumer and travel trade show promotional visits, received somewhat less support.

Best Practices & Findings from Municipal Benchmarking Offer Guelph Insights for Improving Services to Attract Tourists

The Benchmarking research and interviews carried out with representatives from London, Barrie, Brantford, Kingston and Chatham-Kent revealed the following factors which have implications for Guelph's future tourism service delivery:

- **Engagement with Industry – a Key to Success:** all benchmarked municipalities have industry engagement in tourism services through an advisory committee or board. Guelph does not have a tourism industry advisory committee or board.
- **Tourism Services Organization, Governance & Funding – No Best Practices Model Predominates; All Tourism Services Supported by Municipal Funding:** some tourism service delivery organizations are municipal departments; some municipalities deliver their tourism services through an organization which is combined with economic development (Brantford and Chatham-Kent), or independently reports to the CAO (London). Others have a separate non-profit tourism corporation (Barrie and Kingston). All tourism services organizations, irrespective of their organization and governance, receive municipal funding which is viewed as essential to the ongoing sustainability of the organizations and the effectiveness of their programs.
- **Tourism Services Focused on Increasing Visitors from Outside the Municipality & Increasing their Overnight Stays & Related Expenditures:** all benchmarked municipal tourism service delivery organizations view their activities as supporting the local economy and, like manufacturing, bring dollars into the community to support economic growth.
- **Tourism Organizations Believe a Tourism Marketing Strategy is an Essential to Decision-making & Resource Allocation:** London, Kingston, Brantford, and Chatham-Kent have an established and documented marketing strategy which guides their decision-making and targets specific markets. Kingston's plan includes provision to monitor key tourism performance measures. Barrie has a Strategic Action Plan which guides its marketing and product development efforts. Guelph does not have a current tourism marketing strategy.
- **Digital Marketing & Communications Via the Internet Seen as Cost Effective:** all benchmarked tourism service delivery organizations are investing in online marketing and promotion through the Internet, especially with the use of social media which is oriented to the consumer tourism market. (More traditional forms of advertising are perceived to be more effective in dealing with the corporate tourism market.) London and Barrie are particularly advanced in with regard to digital marketing.
- **Cities Making Major Investments in Tourist Attractions & Facilities:** London's Budweiser Gardens, Brantford's Gretzky Centre and Kingston's K-Rock Centre are facilities which have been developed in recent years with a view that these facilities could be used to increase visitation to the City through concerts, performances and sports tournaments. London and Kingston have hired professional entertainment promotion and facility management companies to develop programming and manage their facilities. Guelph's Sleeman and River Run Centres, while excellent facilities, do not have the same capacity and technical capabilities of some of these newer and renovated facilities and the Sleeman Centre is used extensively for local recreation and, therefore, its availability for tourism supportive programming is limited. Chatham-Kent has built a new convention centre to address the meeting and convention market.

- **Cities Have Instituted or are Evaluating the Establishment of Destination Marketing Fees:** Kingston and Brantford have destination marketing fees, as does Ottawa, Toronto and St. Catharines, amongst others. Waterloo Regional Tourism Marketing Corporation is currently exploring the idea of establishing a destination marketing fee across the Region which has implications for Guelph.
- **No Direct Involvement in Tourism Investment Attraction:** none of the benchmarked tourism delivery organizations are actively involved in investment attraction to build new hotels, arenas, or other attractions. This is deemed to be primarily an economic development department mandate in their cities.

Assessment & Recommendations

Based on our review of Tourism Services operations, interviews and survey with stakeholders, benchmarking research with other municipalities, the following Assessment and Recommendations have been developed.

Guelph Tourism Services has gone through a period of change and uncertainty over the past 3 years. In 2012 Tourism Services was transferred from Economic Development to Culture & Tourism within the Community & Social Services Department. Subsequently, Council issued a Request for Proposal to consider an alternative service delivery approach. During this period the Tourism Services organization went through changes in its management and staffing and lost momentum. Departmental management did not engage with stakeholders and the membership fee normally paid by partners was waived. The General Manager, supervisors and staff who remained with the organization continue to provide services while dealing with the uncertainty regarding future tourism services delivery, and in our view have been committed, professionals, seeking to continue to support the tourism industry and provide service to the travelling public.

Organization, Governance & Funding

Organization & Governance

It is clear that the current status quo organization and governance model is not adequate and should change to improve tourism services delivery and increase the number of visitors to the City.

Possible models would include:

- **Revitalized Municipal Department With Industry Stakeholder Advisory Committee**

A revitalized municipal department with industry stakeholder advisory committee providing advice and direction with respect to marketing, product development and other priority services. An alternative visitor information services delivery approach would need to be a component of this model. The department could stay within Culture & Tourism, or be located elsewhere organizationally within the municipal administration, e.g. Enterprise Services, with Economic Development, Downtown Renewal & Community Energy Initiative.
- **Independent Non-Profit Corporation with Board of Industry Stakeholders**

The private non-profit corporation could be an independent organization established for the purpose of providing tourism services without any direct relationship to any business or community organization, or the tourism services could be provided ancillary to other services provided by an existing business or community organization, e.g. chamber of commerce, downtown business association. The organization would require municipal funding, as well as industry stakeholder funding. The non-profit corporation would determine the services to be provided and retain its own staff.

Recommendation #1: It is recommended that the City of Guelph support the delivery of tourism services through a revitalized Tourism Services department with a Tourism Industry Stakeholder Advisory Committee (TISAC). Tourism Services should remain with Culture & Tourism, but its service delivery should be enhanced and guided by the Advisory Committee. A new approach to the services and operation of the tourism information centre currently at City Hall needs to be developed (see also Recommendation #21)

The rationale for this recommendation is as follows. The Tourism Services unit is currently providing most of the priority services. While there could be improvements to the service delivery, the industry stakeholders through the interviews and their responses in the online survey indicate a general satisfaction with the quality and effectiveness of these services. The exception to this are the services provided by the information services centre at City Hall. The services are seen to be ineffective and the location and hours of operation are not supportive of serving the travelling public in an effective manner and this was identified by many stakeholders. An alternative approach to the provision of these services needs to be developed.

The City is providing the major financial support for service delivery and would need to continue to do so in the future to ensure long-term sustainability. The City's budgeting and reporting processes provide a more effective means for ensuring appropriate accountability for these taxpayer dollars than would be a contractual arrangement and an arms-length relationship as would be with the independent non-profit corporation model. Industry engagement can be enhanced through the establishment of a tourism advisory committee (8 – 12 members) which represents the full range of stakeholders and their interests. Differing concerns and priorities have been expressed amongst the stakeholders in the interviews and survey. It is less likely that the full range of stakeholders and interests would be addressed through a private board which would determine its own membership policies and representation. In the revitalized municipal model Tourism Services management and staff can act as facilitators of discussions of these differing concerns and priorities and provide opportunities for networking and information sharing.

Tourism Services management and staff have the expertise and experience to continue forward and maintain existing programs. If the independent non-profit corporation model was adopted there would be a further period of disruption and further loss of momentum which would add to the current uncertain environment. Also, it is likely that with the independent non-profit corporation model there would be less certainty for ongoing and increased municipal funding as there would be greater expectations that the industry stakeholders contribute the majority of the funding in the longer term. This could lead to significantly higher membership fees, which would be detrimental to the small and medium-sized businesses and to long-term sustainability. Municipal funding is the predominant source of funding for tourism services in the benchmarked municipalities.

Municipal Funding

Municipal funding is necessary for the long-term sustainability of tourism services and the economic health of Guelph's tourism sector. All of the benchmarked municipalities provide funding for tourism services delivery and at a higher level per capita than the City of Guelph, with the exception of Barrie.

- Recommendation #2: The City of Guelph should reconfirm its ongoing commitment to financially support the delivery of tourism services to increase the number of visitors, in cooperation with industry stakeholders.
- Recommendation #3: The City of Guelph should consider increasing its financial commitment to Guelph Tourism Services. This increased financial commitment would be for tourism marketing, promotion, product development and to increase tourism supportive programming and events at the Sleeman Centre and River Run Centre. It should be based on a plan developed by Guelph Tourism Services in consultation with the Tourism Industry Stakeholder Advisory Committee and approved by Council, incorporating specific targets and performance measures. (See also Recommendation #18 – Sports Tourism).
- Recommendation #4: The City of Guelph should give consideration to the establishment of a destination marketing fee (bed tax), in consultation with its tourism industry, to increase the availability of funds to support visitor attraction, tourism marketing, promotion and product development.
- Recommendation #5: Guelph Tourism Services should seek to develop sponsorships and other private financing vehicles to support the marketing and promotion for tourism-related events in coordination with its industry stakeholders and event organizers.

Recommendation #6: Guelph Tourism Services should seek to reduce its overall costs for print publications by making them increasingly self-financed through participation by its tourism partners and through expanded use of digital media.

Recommendation #7: As part of its annual planning and to increase the availability of financial resources, Tourism Services should actively seek to leverage other sources of government funding from RTO 4, the Ontario Ministry of Tourism, Culture & Sports, and the federal government.

Stakeholder Satisfaction & Engagement

Based on our stakeholder interviews and online survey, in general, stakeholders are satisfied with the services being provided by Guelph Tourism Services. However, Guelph's tourism stakeholders want to have a greater role in the planning, decision-making and delivery of tourism support services.

Recommendation #8: Guelph Tourism Services should establish a Tourism Industry Stakeholder Advisory Committee to better engage with the tourism sector and to increase their involvement in the planning, delivery and decision making with respect to tourism services. The Tourism Industry Stakeholder Advisory Committee should have 8 – 12 members and include a broad range of industry and community representatives, including hotels and other accommodation providers; tourism-related businesses; cultural event organizers; sports organizations; attractions; transportation; the University of Guelph; business associations, e.g. Chamber of Commerce, Guelph Downtown Business Association. It should meet on a regular basis with representatives of Guelph Tourism – e.g. quarterly. With the assistance of the Tourism Industry Stakeholder Advisory Committee, Tourism Services staff should prepare an annual report summarizing the past year's service delivery accomplishments and effectiveness in increasing tourism, as well recommended future priorities for tourism services. Included in this report should be the results of an annual partnership satisfaction survey and performance measures (see also Recommendation 20).

Recommendation #9: An information / planning session(s) or workshop(s) to review this report's recommendations should be undertaken at the first meeting with the new Tourism Industry Stakeholder Advisory Committee. With the Committee's support and advice on an agenda, a one-day workshop to which all tourism partners / members are invited should be held to facilitate implementation of the recommendations.

Recommendation #10: With the Tourism Industry Stakeholder Advisory Committee's support, two sub-committees, one committee to focus on marketing and promotion, and the other on new product development should be established. These committees would meet with Tourism Services staff to assist with future planning in each of these areas.

Recommendation #11: Create a Guelph Ambassador program with tourism partners and others in the community to promote Guelph as a tourism destination. Provide these ambassadors with appropriate marketing and promotional collaterals / kit which they could use to inform people from outside the City with whom they have contact through their business, service club, sports or cultural organization activity.

Tourism Services Which are Valued by Stakeholders & Which Should be Provided Going Forward

The tourism services most valued by stakeholders are:

- marketing, advertising and promotion
- product development
- market research
- branding
- support for entrepreneurship and small business development

Recommendation #12: The City of Guelph's Tourism Services department should ensure that it is providing, at a minimum, the priority services identified by industry stakeholders with available resources - marketing, advertising and promotion; product development; market research; branding, support for entrepreneurship and small business development. These services should be complemented by an effective services program which includes increased opportunity for member networking and information sharing.

Recommendation #13: Investment associated with hotel and accommodation development and attractions should be the mandate of the Enterprise Services department and Economic Development. Where a possible investment is being pursued which would have direct benefit to the tourism sector, Tourism Services could act as an advisor and provide supportive information.

Tourism Branding, Marketing & Product Development

Guelph Tourism Services has given priority to the leisure services market in its branding, marketing and product development efforts. In future, greater priority needs to be given to the visiting friends and relatives (VFR) market and the corporate business market, which are the City's key tourism strengths. Longer term, the City needs to develop one or more themed tourism generators if it is going to fully fulfill its potential as a tourism destination and establish a clear image of itself with the travelling public. Guelph Tourism Services should continue to work with the County, RTO 4 and others in the region on marketing and product development. It should also put in place a performance measurement system in cooperation with its tourism industry partners.

Recommendation #14: Guelph Tourism Services should explore further development of its Visit Guelph brand and develop strategic goals and messages and a tagline to enhance its visibility as a tourism destination in the eyes of the travelling public.

Recommendation #15: Guelph Tourism Services, working with the Tourism Industry Stakeholder Advisory Committee should begin an exploratory planning process to develop a themed approach to establishing Guelph as a tourism destination over time through the creation of one or more major tourism generators. These tourism generators could evolve from one of the following themes:

- Alternative / Folk / Jazz / Music / Avant Garde Performing Arts Tourist Destination
- Agricultural / Food Themed Tourist Destination Centre
- Green Ecological City of the Future

Recommendation #16: Guelph Tourism Services should continue to pursue the leisure market with available resources, particularly visitors from the Greater Toronto Area and central Ontario region as part of an overall strategy to create one or more tourism generators, building on its current assets and events.

Recommendation #17: Guelph Tourism Services should give priority to and focus more of its marketing and product development resources on the visiting friends and relatives and corporate markets, working with the University of Guelph, hotels and local industry, including:

- consult with the University of Guelph in advance with respect to upcoming events for students and alumni and conferences and symposiums involving participants from outside the City, and develop visitor information kits and tourist packages with the participation of hotels, restaurants and retailers
- develop spousal and partner programs featuring Guelph's attractions, current events and retail areas for those accompanying conference attendees
- develop a "Guelph Welcomes You" program for students and families coming to the University:
 - in the spring and fall to complement the University's "open houses" providing information on its curricula, programs and facilities

- in the fall for Frosh Week and Alumni homecoming events and Fall Preview Day when the new student year begins
- develop a visitor information kit which Guelph-based companies could make available to their corporate visitors
- work with Guelph hotels to make visitor information available to their corporate guests by posting “What’s Happening in Guelph Today?” information in their lobbies and in-room entertainment systems
- provide hotel concierges and desk staff with information on current and upcoming events which could be shared with corporate guests and others such that each hotel, B&B and other accommodation providers become “mini tourist information centres”
- provide Guelph information packages to libraries and city recreation facilities to turn these into mini tourist information centres; consider tourism information training for front line staff in these facilities
- encourage Guelph-based agriculture and food associations to hold their annual meetings and other events in the City and provide participants with visitor information packages and spousal programs

Recommendation #18: Guelph Tourism Services should give greater priority to pursuing the sports tourism market, including provincial, national and international sporting events, tournaments and competitions, building on its strengths as a hotel hub in coordination with the University of Guelph and RTO 4’s regional effort involving Waterloo Regional Tourism Marketing Corporation. The City should provide additional resources to Guelph Tourism Services to support the bid process to bring national and provincial sports tournaments to the City. (See also Recommendation #3).

Recommendation #19: Guelph Tourism Services should continue to work regionally in a collaborative fashion with Wellington County, RTO 4 and other tourism organizations and attractions, building on its strength as a regional hotel hub and leveraging its resources by joint regional marketing and product development. Guelph Tourism Services should continue to work with Wellington County to support the taste•real culinary tourism product. The RTO 4 collaborative initiative to develop sports tourism should be supported and Guelph Tourism Services should be an active promoter of RTO 4’s hotel reservation system.

Recommendation #20: Guelph Tourism Services should develop a performance measurement system and performance measures to support its tourism marketing and event promotion activities. The performance measurement system should include reporting on performance measures and economic impact analyses of promoted events. This performance measurement system will need the cooperation of the hotel and hospitality industry and event organizers to provide visitor attendance, occupancy and expenditure data. The RTO 4 hotel / accommodation registration can also provide data in these regards.

Communications, Including Visitor Services, Website & Social Media

Effective communication is critical to the success of visitor attraction and the creation of a positive experience when they are in the City. Guelph Tourism Services has been actively developing its website and is using social media to support communications with visitors and industry partners. This should continue and be further developed because of its cost-effectiveness. The current City Hall Tourism Information Centre is not cost effective and another approach is needed to better support the information needs of visitors.

Recommendation #21: The City of Guelph and its Tourism Services should develop a series of options for a new approach to the delivery of tourism information services to replace the current approach involving the Tourist Information Centre located at City Hall, and evaluate these options against the following criteria:

- information service should be available during the day, at night and on weekends
- information service should be accurate and updated daily
- information service should be available to visitors where it is most accessible to them
- information service must be cost-effective
- an opportunity for feedback from visitors relative to their experience should be provided

Recommendation #22: Guelph Tourism Services should continue to develop its website and use of social media. It should develop its website to include additional features, information and tools targeted at different audiences, including meeting planners, sports organizations, media / travel writers, companion visitors, FAM trips, convention suppliers, convention services including information booths at conventions, and, as much as possible, improve the online visit experience through increased inter-activity and the use of photos, videos and graphics. It should continue its support for Facebook, Twitter and Pinterest in a compatible way with providing tourist information with a new approach through its tourism information centre.

Recommendation #23: Guelph Tourism Services should develop a process for timely updating of information on its website regarding current and forthcoming events with the support of its partners and the guidance of the Tourism Industry Stakeholder Advisory Committee.

Recommendation #24: Guelph Tourism Services should consider the development of a “native app” to complement its current app for smart phones, iPads and other tablets which could provide information to a visitor which they can access while travelling around the City. This native app could provide locational and other information on Guelph attraction, restaurants, hotels and other places of interest which is keyed to the GPS locator in the visitor’s smart phone or other digital device.

Recommendation #25: Guelph Tourism Services should actively monitor online usage statistics to improve the website architecture and content and its overall tourism services.

Recommendation #26: Guelph Tourism Services should explore with the City’s hotels the potential to include a daily “What’s Happening in Guelph” webcast which could be distributed through the hotels lobby information and in-room entertainment systems to showcase Guelph and current events which would be of interest to visitors.

City & Region Infrastructure Improvements Would Benefit Tourism

Recommendation #27: The City of Guelph, with the input of Tourism Services and its Transportation department should develop a way-finding signage plan for the City which would provide visitors as well as residents with directional information to the City’s facilities, attractions, parks and unique areas of interest.

Recommendation #28: The City of Guelph, with the support of Guelph Tourism Services and Kitchener/Waterloo, should encourage GO Transit to expand its schedule and increase access for visitors from Toronto and the GTA to Guelph weekdays and on weekends to complement the recently expanded service for commuters from Guelph to Toronto.

Recommendation #29: The City of Guelph should give consideration to upgrading existing City facilities, e.g. Sleeman Centre and River Run Centre to better meet the technical and broadcast requirements of concert promoters and sports organizations as the lack of such technical capacity is an impediment to these centres hosting events which would attract visitors from outside the City. In its planning the City should also evaluate the need for lower cost recreational facilities to meet local needs, freeing up time and space for larger events at its two major facilities.

Implementation

Effective implementation of these recommendations will require leadership and cooperation by Tourism Services management, staff and industry stakeholders, as well as support by other City departments. A draft Implementation Plan Framework has been provided which identifies the key management, staff and industry roles and responsibilities and timeframe for preparing action plans relative to each recommendation, and then carrying forward with implementation over a 3-year timeframe. Progress in fulfilling the Implementation Plan can be monitored and reported on by the Tourism Industry Stakeholder Advisory Committee and Tourism management can report on the progress through the City's annual budgeting process and through the preparation of an annual report (see Section 7.0).

Organizational Review of City of Guelph Tourism Services

1.0 Introduction

The City of Guelph is a growing, diverse and vibrant community with a well-educated population of just over 122,000. Guelph citizens take pride in the City's rich heritage which dates back to the early 1800's. Today, the City of Guelph has a growing economy focused advanced manufacturing, with agriculture and life sciences, and environmental technology sectors contributing to the City's economic development. The City of Guelph recognizes that tourism is another key sector of its economy and that the City's heritage, educational, recreational and cultural assets can provide visitors with many opportunities for enrichment, entertainment and recreation. The City has been giving consideration to the types of tourism support services and the manner in which these services should be delivered to increase the number of visitors and the length of their stays in the community.

To this end, the City commissioned GGA • Management Consultants and TCI Management Consultants to undertake an Operational Review of the City's Tourism Services. This report summarizes our assessment and recommendations. The objectives of this review were as follows:

1.1 Objectives of the Review

To review, assess and make recommendations for service delivery improvement relative to:

- Existing Services, Service Delivery, Business Processes, Customer Service, Effectiveness & Efficiency
- Current Organization, Governance, Management & Operations
- Management & Staff Roles, Responsibilities & Resource Levels
- Budgets & Expenditures Relative to Mandate
- Coordination & Clarification of Roles & Responsibilities vis-a-vis Other City Departments
- Communications & Coordination with Tourism Partners & Other Stakeholders
- Implementation & Performance Measurement

In addressing these objectives a comprehensive research and consultation program was undertaken, including the benchmarking of Guelph's tourism services with 5 other similar municipalities in Ontario.

1.2 Operational Review Methodology

This integrated operational review was carried out in three phases:

- Phase I: Initial Research & Finalize Workplan**
- Phase II: Undertake Services Review & Stakeholder Consultation & Prepare Assessment**
- Phase III: Develop Tourism Delivery Model & Improved Services Recommendations**

Operational issues were considered through the following information-gathering and research. Based on the findings, the Assessment and Recommendations contained in this report were prepared. This information gathering and research included:

- Review of background documents, including:
 - City of Guelph *Tourism Services Annual Marketing Plan, 2008*.
 - Regional Tourism Profiles, 2009 – RTO4, *Wellington County*.
 - City of Guelph: *Prosperity 2020: Economic Development & Tourism Strategy* – March 2010.
 - City of Guelph EDTS Marketing, *Communications, and Branding Strategy and Implementation Plan, 2011*.
 - City of Guelph. *Guelph Tourism Services Workplan, 2011*.
 - Yfactor. *Guelph Brand Manual*. December 6, 2011
 - City of Guelph Economic Development & Tourism Services. *Open for Business. Marketing Communications & Branding Strategy*. February 27, 2012.
 - City of Guelph, Visit Guelph. *Visit Guelph and Wellington County RTO4 Partnership Funding Joint*

Application – Visit Guelph and Wellington Community Futures. May 10, 2013.

- Ontario Ministry of Tourism, Culture & Sport, Tourism Research Unit. *Tourism Statistics, RTO 4. Spring 2012* City of Guelph. *Tourism Services Presentation to CSS Management Group, June 2012*
- Marketing Tactical Plan & Budget 2013 *Visit Guelph & Wellington County.*
- Visit Guelph Wellington.ca. *Visit Guelph Analytics.*

Tourism Services organization charts, job descriptions, budget documents, visitor statistics were also reviewed.

- interviews with Tourism Services supervisor and staff, and preparation, distribution and analysis of staff questionnaires regarding management and administration of tourism services activities
- review of Tourism Services organization, management and staff roles, budgets / expenditures, business practices and customer service
- interviews with City of Guelph departmental managers whose departments have involvement with Tourism Services relative to roles, responsibilities and coordination, including:
 - Manager, Cultural Development
 - Manager Riuver Run Centre,
 - Manager Sleeman Centre
 - Manager, Service Guelph
 - General Manager, Economic Development
 - Downtown Renewal representative
- interviews with external industry partners and stakeholders, including:
 - Downtown Guelph Business Association
 - Guelph Chamber of Commerce
 - Wellington County Economic Development Officer
 - GM Delta Hotels
 - Owner/Operator Norfolk Guest House
 - Director, Guelph Arts Council
 - Directors, Hillside and Guelph Dance Festivals
 - University of Guelph representatives: President's Office, Director of Athletics, School of Hospitality, Food and Tourism
 - CEO RTO 4
 - Ministry of Tourism, Culture & Sports Regional Office representative
- an online stakeholder survey was also prepared and notification was provided to all existing Guelph tourism industry partners and to the Guelph Chamber of Commerce and Guelph Downtown Business Association for their members
- benchmarking / best practices research and interviews with 5 comparable municipalities regarding their tourism services. The selected cities were London, Barrie, Brantford, Chatham-Kent and Kingston
- preparation of Draft Final Report presentation, which included an assessment of tourism services delivery and identification of directions for recommendations
- presentation to the Project Oversight Committee, addressing its comments in the final report and recommendations and
- Preparation and submission of Final Report, including Recommendations and Implementation Plan

In Section 2.0 of this report an overview of the tourism sector and its benefits in Ontario and in Guelph / Wellington is presented to provide a context for the Assessment and Recommendations which follow in subsequent sections of the report.

2.0 Overview of Guelph/Wellington's Tourism Sector & its Economic Benefits

2.1 Tourism Sector in Canada, Ontario & in Guelph/Wellington

The tourism sector includes business and organizations involved in:

- Accommodation, e.g. hotels, motels, B&Bs
- Food and beverage, e.g. restaurants, bars, breweries, wineries
- Recreation and entertainment, e.g. museums, festivals and events, performing arts centres, sporting events, etc.
- Shopping and services
- Transportation, e.g. local and regional transit – bus, taxi, rail

The tourism sector in Canada, Ontario and Guelph/Wellington contributes significantly to economic activity and employment as demonstrated by the following data:

- Canada attracts 16.0 million international visitors annually who spend \$11.9 billion (2012)
 - Average international visitor spends \$743
- Ontario attracts 138 million person-visits annually who spend \$20.8 billion
- Average Ontario visitor spends \$150
- Guelph/Wellington County: 10.7 million person visits annually (2011 stats);
 - Visitor spending estimated to be \$171.8 million/year (see Appendix 1 [Economic Impact] for a discussion of the methodology used to develop this estimate)
 - This level of expenditure is associated with the creation of \$108.7 million of Gross Domestic Product (GDP - the value of all associated goods and services) generated in the County
 - 2,023 jobs and \$67.9 million in wages and salaries in the County; and \$54 million in taxes generated to all levels of government

Guelph's tourism sector brings significant economic benefit to the City and the County, as illustrated by the expenditures made by visitors. The tourism sector brings (imports) dollars from outside the City and County which helps to sustain and grow local businesses and employment. In this way tourism is an export sector like manufacturing. Whereas in manufacturing products are made within the City and County but consumed elsewhere with the profits returning to the local manufacturer, in tourism the products are made within the City and County and the consumers bring their dollars to the City and County and consume the products locally. Export sectors, by bringing new dollars into the City and County economy, are the key to long-term economic growth and sustainability.

Expenditures by visitors to Guelph help to underwrite the costs of City infrastructure, e.g. River Run Centre, Sleeman Centre, Museum, recreation facilities, through patronage and rentals.

Guelph's tourism sector also increases public awareness of the City and its brand which, in turn, supports broader economic development, investment attraction and business confidence.

Guelph's tourism sector includes many small and medium-sized businesses which benefit from visitors and provide employment to a large number of local people. The economic benefits of tourism are, therefore, spread widely in the community.

2.2 Guelph's Strengths & Weaknesses as a Tourism Destination

Guelph has a population of over 122,000, is located near the 401 highway within an hour's drive of the Greater Toronto Area and is home to a major Ontario university. It is an attractive community with an historic downtown, mature tree lined streets and many parks and green spaces. Its major strength as a tourism destination is for visiting friends and relatives particularly given the student population associated with the university. Guelph also has a diversified economy with a number of head offices and major employers e.g. Sleeman Breweries, Linmar. These companies bring corporate visitors to the City. Guelph is an accommodation hub not only for the City but the surrounding region with 8 hotels as well as bed and breakfast and motel establishments.

The City does not have any major natural tourist generators as it is not adjacent to a lake, waterfall, escarpment or mountain which can create recreational opportunities. It also does not have a major tourist attraction e.g. theme park, waterpark, zoo or wildlife conservatory, casino, etc. There are such tourism generators nearby including Elora Gorge and African Lion Safari but they are located in elsewhere in Wellington County or other communities.

Guelph does have a number of festivals and events which bring visitors to the City including Fab 5 events of the Hillside Festival, Eden Mills Writers Festival, the Guelph Jazz Festival, the Festival of Moving Media and the Guelph Contemporary Dance Festival. The University of Guelph hosts many conferences and seminars as well as sports events which attract visitors. While Guelph is not a major host for provincial and national sports tournaments, the recent hosting of Hamilton Tigercats football games in the City has demonstrated the economic benefits that can come with the hosting of sporting events. Guelph's River Run Centre and Sleeman Centre host performing arts and sporting activities which attract visitors but for the most part these facilities are used primarily by local residents. For example, the Sleeman Centre has some of its available ice time used for local recreational hockey and is not available for events which might attract visitors from outside the City and Region. It was reported to us that these facilities lack the most up-to-date electrical and communications systems which limits their attractiveness to private concert and event promoters in contrast to facilities in other Ontario cities e.g. Budweiser Gardens in London, K-Rock Centre in Kingston.

Guelph is in a very competitive tourism market with other cities in south-western Ontario for visitors from the GTA and the US. As it does not have a major tourism generator it will need to focus its tourism promotion, marketing and product development to take advantage of its key strengths and address over time its weaknesses if the city and its economy are to realize fully the benefits which can come from increased numbers of visitors staying for longer periods and their related expenditures.

In Section 3.0 of this report, a description of Guelph Tourism Services, its organization, funding and services is provided.

3.0 Guelph Tourism Services

3.1 Current Tourism Services

Guelph Tourism Services provides services which help to attract visitors and provide them with useful information to help them to enjoy their stay within the City. These services include:

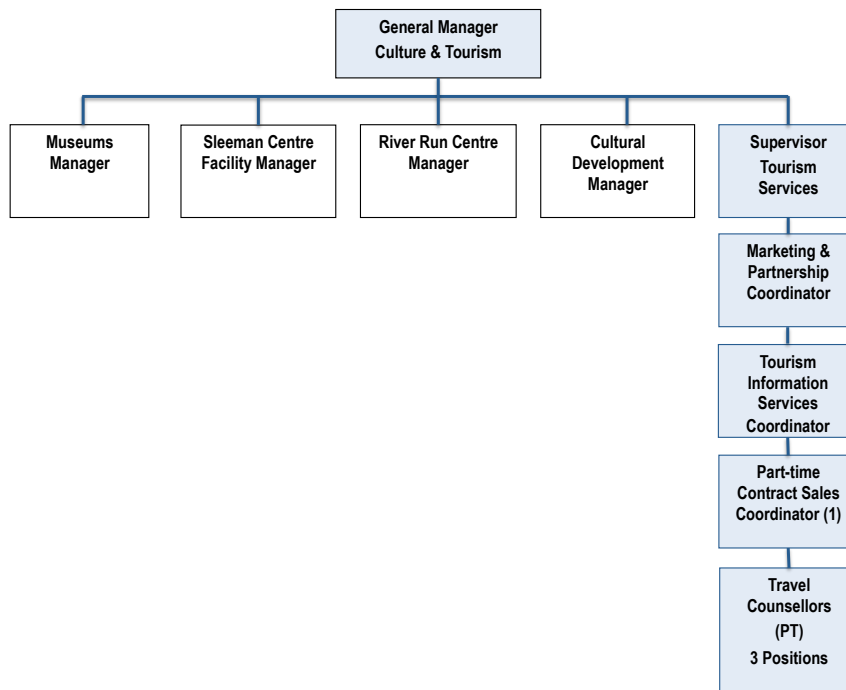
- Tourism Marketing and Promotion, including the development of a tourism brand, messaging and advertising to increase the awareness of the travelling public and to inform them of the benefits of visiting Guelph
- Tourism Product Development, including the creation of visitor experience opportunities involving the packaging of entertainment, hospitality and accommodation services
- Partnerships and Member Services, including the development of shared opportunities for advertising, promotion and information sharing to the travelling public, and the provision of advisory and support services to local tourism businesses to support their growth and expansion
- Communications including:
 - direct one-on-one visitor services through a visitor information centre located on the main floor of City Hall
 - the establishment of a Tourism Services website with information on local events and attractions
 - the development and dissemination of visitor guides, maps, brochures and other printed media
 - the use of social media, including Facebook, Twitter, Pinterest, to inform and communicate with visitors

3.2 Organization & Governance

Guelph Tourism Services is a unit within the Culture & Tourism Division of the Community & Social Services Department of the City of Guelph's municipal administration. Guelph Tourism Services reports to the General Manager, Culture & Tourism. The Culture & Tourism Division includes responsibility for the City's Museums, Sleeman Centre, River Run Centre, Cultural Development and Tourism Services. Tourism Services has 3 full-time and 4 part-time positions reporting to the General Manager, Culture & Tourism. This includes the following positions as illustrated in the organization chart which follows:

- General Manager, Culture & Tourism (management responsibility split between Culture & Tourism)
- Supervisor Tourism Services
- Marketing & Partnership Coordinator
- Tourism Information Services Coordinator
- 3 PT Travel Counsellors
- 1 PT/contract Sales Coordinator

Chart I: Guelph Tourism Services Organization Chart



Tourism Services reports through its General Manager through the Community & Social Services Committee, a committee composed of municipal councilors who oversee the Community & Social Services Department's programs and activities, to Council. There is no separate Committee of Council or advisory committee with specific responsibilities for overseeing the delivery of tourism services.

Guelph Tourism Services has tourism industry partners or members with whom it works to attract and support visitors. Each tourism industry partner pays an annual membership fee of \$250 and partners also contribute financially to information guides and advertising brochures, and participate in packaged visitor experience products where they may provide discounts to visitors. For their fee they receive the following:

- A listing in the visitor guide "Visit Guelph & Area Guide"
- A listing on the Guelph Tourism website which includes company name, 10 word description, and full website address (This includes the option to pay for 10 other website information features - see below)*
- A listing on the Visit Guelph App which includes company name, link to website, direct messaging link to email and Twitter, photo, and mapping
- Use of the on-line Events Calendar to advertise events

*Additional website listing features are available at an increased cost.

The Sales Coordinator consults with members by telephone and in person to encourage them to renew their membership for the coming year and to participate in advertising and promotional opportunities.

The number of partners averaged 132 between 2008 and 2012 as shown in the following chart. No new memberships were registered in 2013 because of the City's decision to issue an RFP to have tourism services

provided by an external organization. Members registered in 2012 continued to have their listing maintained although no fee was collected. After the RFP responses were deemed to be inadequate, Tourism Services in 2014 began to register partners again and to date 78 have paid their fees. Staff report that partner registrations have been slower this year because of uncertainty regarding the City's future role in tourism services delivery.

Chart II: Tourism Partner Membership Trends:


Year	Number of Partner Members
2008	160
2009	150
2010	100 (website launch)
2011	120
2012	141
2013	141 (carried over from 2012)
2014	78 (to date)

Guelph Tourism Services works with RTO 4, the provincially-established regional tourism organization which in addition to Guelph and Wellington County includes Huron, Perth and Waterloo counties, on regional tourism, marketing and development programs. Guelph Tourism Services also works with Wellington County's Economic Development Department, most recently with respect to the development of culinary tourism opportunities across the County. Guelph Tourism Services has also started to work with Waterloo Regional Tourism Marketing Corporation and RTO 4 to develop sports tourism opportunities, including the attraction of provincial and national tournaments, games and other competitions.

3.3 Guelph Tourism Services Operating Budget 2014

Guelph Tourism Services Operating Budget 2014 is presented in Chart III which follows:

Chart III: Guelph Tourism 2014 Operating Budget

City of Guelph 2014 Operating Budget	
	2014 Requested
<hr/>	
Community & Social Services	
43 Culture and Tourism Division	
740-1006 TOURISM	
Revenue	
9256 ADVERTISING REVENUE	(\$53,500)
9313 TICKET SALES SURCHARGE	(1,000)
9509 PROMOTIONAL ITEM SALES	(\$2,000)
8505 PARTNER CONTRIBUTIONS	(\$14,250)
Total Revenue	<u>(70,750)</u>
Expenditure	
Salary, Wage & Benefits	
Salary & Wages	\$233,360
Employee Benefits	\$58,666
2102 OFFICE SUPPLIES	\$2,000
2104 PRINTING & REPRODUCTION	\$600
2415 PROMOTIONAL MATERIALS	\$4,000
3306 COURIER	\$500
3307 ADVERTISING	\$10,500
3311 CELLULAR PHONE CHARGES	\$1,500
3404 MILEAGE	\$1,500
3512 PROMOTION	\$14,800
3518 CONTRACT STAFF	\$5,100
3535 GRAPHIC DESIGN SERVICES	\$26,500
3546.CAMP1 PROMO CAMPAIGN 1	\$25,200
3546.CAMP2 PROMO CAMPAIGN 2	\$50,000
3546.CAMP3 PROMO CAMPAIGN 3	\$12,000
5501 BANK CHARGES	\$150
Total Expenditure	<u>446,376</u>
Total TOURISM	<u><u>375,626</u></u>

3.3.1 Operating Budget 2014 Summary & Comments

It can be noted from the chart above that of the total Guelph Tourism Services expenditure of \$446,376, the municipal contribution is \$375,626. This constitutes approximately 85% of the department's budget and represents a contribution of \$3.08 per capita based on the City's population of 122,000. The salary, wages and benefits component of the total budget is approximately 65%. The contribution being made by industry partners through membership fees and participation in advertising campaigns is \$67,750, representing approximately 15% of the department's budget.

It is clear from an examination of the budget that the municipality is making by far the largest contribution to the promotion and marketing of tourism to attract visitors to the community. The industry contribution is significantly less; a review of past budgets suggests that this relationship has changed little over the past few years. Given that salary, wages and benefits are equivalent to about 65% of the total budget, the actual funds available for marketing, promotion, product development and communications is quite restricted given the costs of advertising, particularly print advertising.

3.4 Guelph Tourism Services' Achievements

Guelph Tourism Services has gone through a significant period of change and uncertainty, including the transfer from Economic Development to Culture & Tourism within the Community & Social Services Department and the decision by Council to explore provision of tourism services by the private sector, as described earlier. The Tourism Services unit has experienced a continuous change in supervision and staffing due to retirement and transfer of staff. Despite the uncertainty the General Manager, the acting Supervisor and current staff have taken action to continue to support the tourism industry and the attraction of visitors.

3.4.1 Development of "Visit Guelph" Brand, Marketing, Tourism Products & Events Support to Attract Visitors

Guelph Tourism Services has acted upon some but not all of the *Prosperity 2020* & Economic Development & Tourism *Open for Business* recommendations, including the development of a new tourism brand to support its marketing efforts:



The development and implementation of this new tourism brand included the creation of new website graphics for inclusion in marketing collaterals and brochures and revisions to some marketing collaterals. The department also has sought to use this new brand to bring renewed vigour to its marketing and promotional efforts. This has been limited by restrictions on the availability of municipal funds and the decision not to charge tourism partners for their memberships in 2013.

Guelph Tourism Services has a limited range of visitor accommodation and experience products, but has had success in developing taste•real, a culinary tourism program involving local restaurants and food producers and which has now become a County-wide program, being led by the Economic Development Department of the County of Wellington. Tourism Services has developed "Art About Town" and other self-guided tours over the recent past which are attractive to visitors. It has also developed a program to encourage cycling within the community to benefit visitors, as well as residents. Most recently, working with the University of Guelph, Tourism Services has developed a tourism product to support visitation related to the University's 50th Anniversary.

Guelph Tourism Services has been actively working with cultural and heritage organizations to support the development and marketing of their events. It has worked closely with the managers and producers of the Hillside Festival, Eden Mills Writers Festival, the Guelph Jazz Festival, the Festival of Moving Media and the Guelph Contemporary Dance Festival and others to create the Fab 5 brand as a means of raising awareness amongst visitors and residents of these performing arts events and encouraging core operative support amongst the arts organizations. Latinofest is another example of an event which has been supported by Guelph Tourism Services,

similarly Doors Open Guelph. One stakeholder suggested that Doors Open could be extended to a 2-day event given the number of historic properties and this could increase overnight stays by visitors.

3.4.2 Communications to Support Visitor Attraction

Guelph Tourism Services has recognized that it needs to reach out to beyond the City's boundaries to other communities in the GTA and south-western Ontario market, and that the most effective way of doing this is through digital media. It has created a new Visit Guelph website which provides information on current and upcoming events and opportunities for dining and shopping. The website also provides information on available accommodations, e.g. hotels, B&Bs, camping and retreats. Guelph Tourism Services has worked with RTO4 which developed an accommodation registration system for booking rooms in Guelph and across the Region. Access to the accommodation registration systems is available through Guelph Tourism Services' website.

An application has been developed by Guelph Tourism Services for use on smart phones and other hand-held digital devices, e.g. tablets. It has also developed a video accessible on the website which provides potential visitors with images showing various attractions and areas of interest in Guelph. To complement the website, staff have established a Guelph presence on Twitter and Facebook, and provide ongoing support to visitors who contact the City through these means. It has been reported that Twitter@visitguelph has over 3,700 followers, demonstrating the effectiveness of this social media tool.

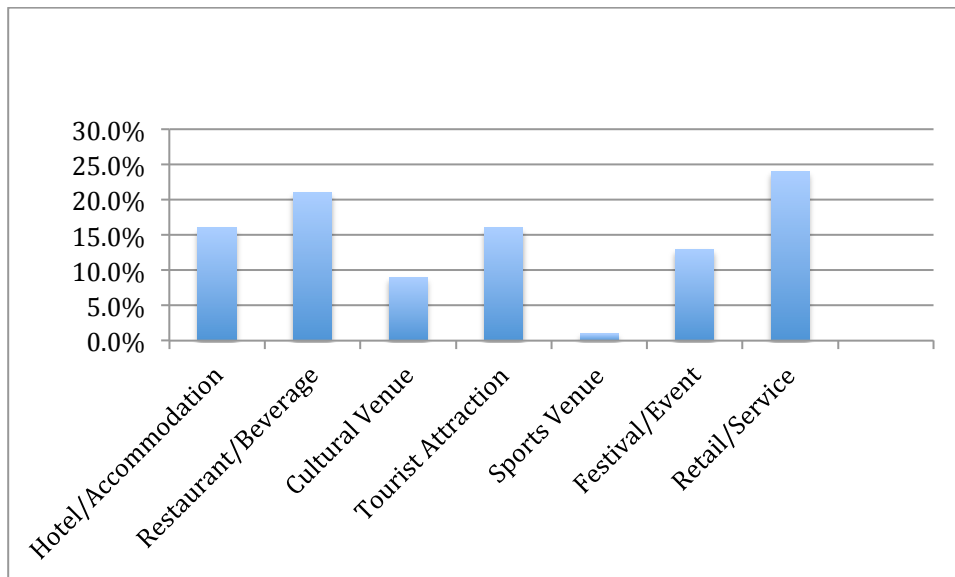
In Section 4.0 of this report stakeholder perspectives relative to the services as provided by Guelph Tourism are described as gained through interviews and an online survey.

4.0 Tourism Stakeholder Perspectives on Guelph Tourism Services

4.1 Tourism Stakeholder Interview & Survey Results

In order to obtain Guelph Tourism Services' stakeholder views on the services being provided, their effectiveness and the challenges faced by the tourism industry in Guelph, interviews and a survey were conducted with Guelph tourism businesses and organizations. Interviews were held with representatives from the Downtown Guelph Business Association, Chamber of Commerce, individual hotels and B&Bs, Hillside Festival, Guelph Dance Festival, University of Guelph, amongst others (see Appendix 2). A stakeholder survey was also developed and posted online and an information notice was sent to all Guelph tourism industry partners / members (141) and to the Chamber of Commerce and Downtown Guelph Business Association so their members could complete the survey as well. A total of 55 surveys were completed, of which 39 were completed by respondents who are Guelph Tourism Services members, and the rest were non-members - a good response for an industry survey of this type. The respondents to the survey represented a broad cross-section of Guelph businesses and organizations involved in the tourism sector, as can be seen by Chart IV.

Chart IV: Type of Business – Survey Respondents



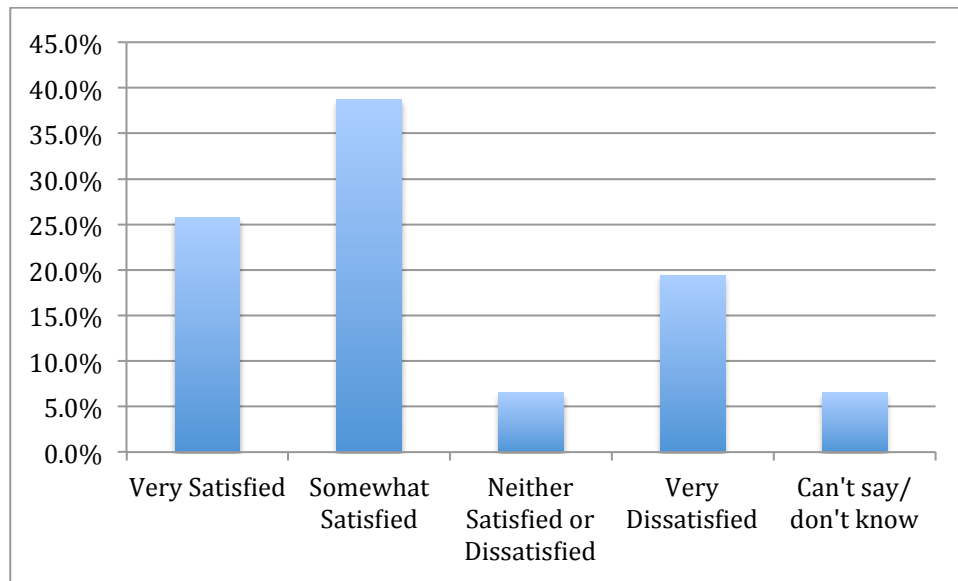
* note that 50 respondents answered this question

98% of the respondents were located in Guelph and Wellington County. 75% of the industry respondents had under 25 employees and less than \$1m in sales. 23% had 50 – 100 employees or more. 71% were current Guelph Tourism Services members or partners who had paid fees, the remainder were Guelph businesses or organizations which were not. 70% of the respondents reported having made use of or benefited from Guelph Tourism Services in the past.

4.2 Satisfaction with Services Provided by Guelph Tourism Services

When asked their level of satisfaction with the services provided by Guelph Tourism Services, of those who responded to this question 65% reported that they were very satisfied or somewhat satisfied with the services provided, while 23% were somewhat dissatisfied or very dissatisfied (see Chart V).

Chart V: Satisfaction with the Services Provided by Guelph Tourism Services



* 23 respondents answered this question – but note as per above that only 39 survey respondents were members of Guelph Tourism

The findings from the survey were complementary to and very consistent with the views expressed by the stakeholders in the interviews. The following provides an overview of stakeholder perspectives on Guelph Tourism Services as gathered through the interviews and the survey.

4.3 Organization & Governance of Tourism Service Delivery

Tourism stakeholders had a range of views concerning the manner in which tourism services should be organized and delivered. As noted earlier, the majority of the respondents and those interviewed were generally satisfied with the tourism services as currently provided through the current Guelph Tourism Services municipal organization and would like to see these continue. There were some who indicated that they would like to see an independent organization delivering tourism services, e.g. non-profit industry organization, existing community organization or private company. Private for-profit tourism businesses would favour more direct industry involvement in tourism services and decision-making. Non-profit tourism organizations, e.g. festivals and events, are concerned that their contributions to tourism revenues are not being recognized by the private sector and would like to see more support from the municipality and recognition by business of their contribution to industry revenues.

Many expressed concerns regarding the location of the Tourist Information Centre in City Hall, its lack of visibility and lack of effectiveness in bringing tourists downtown. They view it as not prominently located and visible, nor is it located at one of the gateways to the City, as indicated by the following comments:

“Guelph Tourism Office is hidden away from tourists at City Hall. It should have an easily accessible location, easier for tourists to find”.

“As for location, in some ways downtown is great but when I think of tourism offices that I have visited they are generally somewhere that you can stop into when you approach the city. There should be free parking available and the office should be open weekend/extended hours. Perhaps the downtown location could be a secondary location for downtown visitors, with a main branch in another location”.

“Unless the Tourism office moves to a prominent site upon entering the City with parking, there is not much point in staying open”.

4.4 Funding & Ongoing Municipal Support for Tourism Services

A majority of those interviewed and survey respondents stated that there should be ongoing municipal support for the provision of tourism services. This was the case whether the services were to be provided as they are now by the municipal organization, or if the services were provided by a private non-profit industry-run organization or other organizational arrangement. There was a concern expressed by some that current municipal funding was inadequate and was not assured looking to the future, as indicated in the following comments expressed by survey respondents:

“Have a budget that supports it properly”.

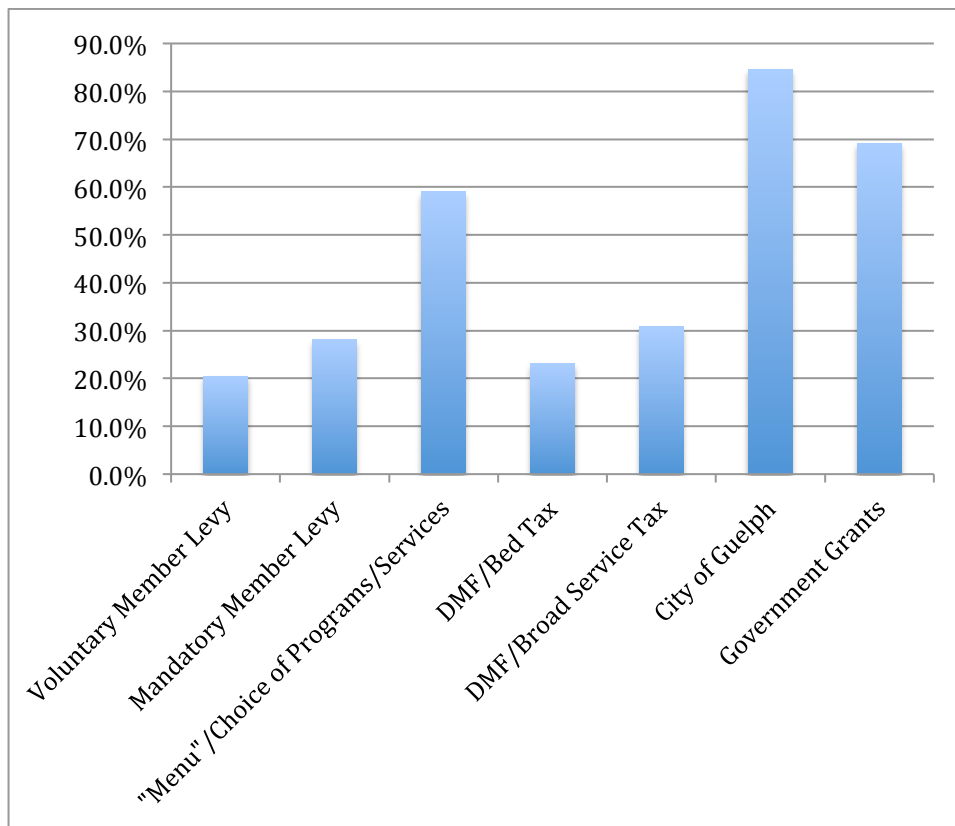
“GTS do a good job with what they have but don’t have enough (money) to do a good job overall”.

“Can’t understand why City is trying to bow out of promoting this area”.

That being said, a majority of stakeholders believe that the funding of tourism services should come from a number of sources, including the industry stakeholders themselves, RTO 4, the Ontario and federal governments.

As can be seen from Chart VI, survey respondents indicated that the three most appropriate sources of funding were funding from the City of Guelph, other government grants, and funding based on a “menu” of programs and services available that businesses could purchase. There was also support for a levy to be paid by businesses in the tourism sector and some support for the consideration of funding through a destination marketing fee (DMF), either a bed tax collected by hotels, or a broader service tax paid by visitors.

Chart VI: Funding Sources for the Delivery of Tourism Support Services



* 31 respondents answered this question

4.5 Stakeholder Engagement, Communications & Networking

Many stakeholders indicated that they believe that more direct involvement with Tourism Services would be beneficial. This would include: involvement in planning and decision-making via a board or committee; participation in networking and information-sharing events, and involvement in the development of new products and services, amongst other activities. They also believe that Tourism Services, working with others in the tourism sector, could be an advocate within the City with other levels of government to address infrastructure and other needs which would be of benefit to the sector. They also indicated that Guelph Tourism Services needs to expand its community outreach and communications and make use of social media to support these activities. This wish for greater engagement, participation and communications with Tourism Services is reflected in the following comments from survey respondents:

“Needs to be more networking and promotion with members”.

“Facilitated discussions with other stakeholders where we could be given the opportunity to say what we need and to see each others perspectives”.

“A round table to share ideas among the stakeholders to provide insight into each others strengths and successes attracting customers. This could help align partnerships within our community if we understood the service each of us provide and enable us to communicate that to people visiting us”.

“Could bring more industry stakeholders to the table to discuss future and what is needed to make Guelph more of a tourism destination”.

“Community outreach and communications – help local organizations understand the efforts of Guelph Tourism so they can support it – conference packages for visitors, possible participation in events that Guelph Tourism is providing, etc”.

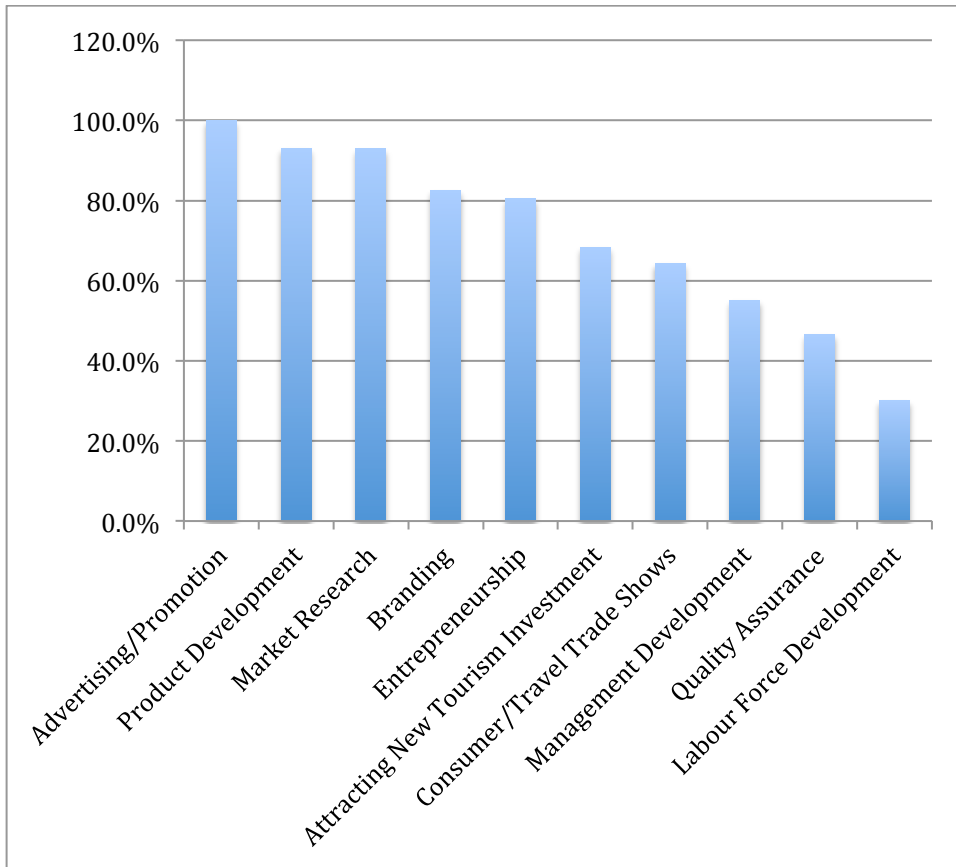
“Social networking, somehow connect visitors and businesses through social network sites. Can use Pinterest to showcase various (tourism) businesses within Guelph, You Tube to do interviews with local business people, Facebook to have discussions about what citizens/tourists want to see or to showcase unique places in Guelph and surrounding area”.

4.6 Tourism Support Services Which Would be of Benefit to Stakeholders & Would Help to Attract Visitors

Some interviewees and survey respondents indicated that they were unclear as to the services which Guelph Tourism Services provided. Others expressed concerns with regard to the cost of membership in Guelph Tourism and participation in advertising and promotional campaigns. Concerns with regard to cost were most evident with small and medium-sized industry stakeholders, including cultural event organizers. Some also expressed concerns with regard to the return on investment to them for their membership and participation in advertising and promotional campaigns and would like to receive more information demonstrating the value. Chart VII illustrates the services that respondents would like to see continued and/or provided in the future.

Branding, advertising and promotion, product development, market research, support for entrepreneurship and assistance to new and small tourism oriented businesses were the tourism services which would be most valued by stakeholders. Services to support labour force development, management development, quality assurance, industry investment attraction, and consumer and travel trade show promotional visits, received somewhat less support.

Chart VII: Tourism Support Services Most Valued by Stakeholders Looking to the Future



* Each of these areas (Advertising/Promotion; product Development; etc.) was asked as a separate question and thus had a slightly different response base. Depending upon the area, this response base varied from 31 to 36 respondents.

In Section 5.0 of this report which follows, the results of a benchmarking and best practices review of tourism services as provided by five other Ontario municipalities is presented as a further input to the overall Assessment of Guelph Tourism Services which is described in Section 6.0.

5.0 Municipal Benchmarking – Tourism Services

5.1 Introduction

As a further source of information to assist in the review of Guelph Tourism Services, and to identify best practices and possible opportunities for improvement, Guelph Tourism Services was benchmarked with the tourism services provided by 5 other comparable municipalities. These municipalities were selected based on an approved list of comparable municipalities established by a resolution of Guelph City Council December 21, 2009 (see Appendix 3). The list of comparable municipalities was further screened based on the following factors:

- Population
- Growth % (past 5 years)
- Single or Two Tier municipal administration
- Presence of a university
- Having rural and urban tourism opportunities

Chart VIII illustrates these factors as applied to 11 Ontario municipalities. In consultation with the Project Oversight Committee and based on our recommendation, the following municipalities were selected for benchmarking:

- London
- Barrie
- Kingston
- Chatham-Kent
- Brantford

Interviews were conducted with representatives who provide tourism services in each of these municipalities (see Appendix 6). In addition, their tourism marketing and promotional websites were reviewed and information on their organization, staffing and budgets as provided by these municipalities was also reviewed (see municipal organization charts and staffing summary Appendix 7).

Kitchener, Waterloo and Cambridge were not included as they are two-tier municipalities, unlike the others which are single tier municipalities that have sole responsibility for their municipal services, including tourism. However, Interviews were conducted with Waterloo Regional Tourism Marketing Corporation, RTO 4, the County of Wellington’s Economic Development Department and the Ontario Ministry of Tourism, Culture & Sports regional office representative to bring a regional perspective to our assessment.

Chart VIII: Municipal Benchmarking Matrix

Municipal Benchmarking Matrix: City of Guelph Tourism Services Review							
Ontario Municipalities Competing for the Southern Ontario Tourism Market							
Municipalities	Population	Growth% (past 5 years)	Single Tier	Two Tier	University	Urban / Rural Tourism Opportunities	Recommended for Benchmarking
Guelph	122,000	5.9	X		X	X	√
Kingston	123,000	5.3	X		X	X	√
Hamilton	520,000	3.1	X		X		
London	366,000	3.9	X		X	X	√
Brantford	94,000	3.8	X		X	X	√
Ottawa	883,000	8.8	X		X		
Barrie	136,000	5.7	X			X	√
Kitchener	219,000	7.1		X		X	
Waterloo	99,000	1.3		X	X	X	
Cambridge	127,000	5.3		X	X	X	
Chatham-Kent	103,000	-4.2	x			X	√
Windsor	210,000	-1.3	X		X	X	

5.2 Key Observations & Best Practices Common to the Benchmarked Municipalities

5.2.1 Engagement with Industry – a Key to Success

All of the tourism services organizations in the 5 municipalities consulted reported that in their experience the most important factor which was contributing to the success of their tourism marketing and promotion, product development and other support initiatives was their engagement with their local tourism industry. All of the organizations consulted have either an industry advisory committee or an independent board which works with and provides advice to the management and staff with regard to the tourism services being provided and related priorities. London, Barrie, Brantford and Kingston all have an advisory committee or board with industry members; Chatham-Kent is in the process of establishing an industry advisory committee. Guelph does not currently have an industry advisory committee or industry board; the engagement with industry occurs primarily through contact by the Marketing & Partnership Coordinator and Supervisor Tourism Services.

5.2.2 Tourism Services Organization, Governance & Funding – No Best Practices Model Predominates; All Tourism Services Supported by Municipal Funding

Tourism services are provided through different organizations in each municipality. Tourism London is a department of the City, reporting to the CAO, and has an industry advisory board which includes 2 Council representatives. Tourism Barrie has an independent private not-for-profit corporation with an industry board; receives municipal funding and has two municipal representatives on its board. Tourism Brantford is a division within the City's Economic Development Department and 3 Council advisory committees: Tourism Advisory Committee, Cultural Advisory Committee and Economic Development Advisory Committee, which provide advice and support. These committees include both Council and industry representatives. Tourism Kingston is part of the Kingston Economic Development Corporation (KEDCO), an independent non-profit corporation with industry representatives, as well as 3 councillors and the mayor. There is also a tourism advisory committee which has industry representatives and acts as a specific advisor to the management and staff which provide tourism services. Chatham-Kent Tourism is a division within the City's Economic Development Department and is currently establishing an industry advisory committee. Guelph Tourism Services, as described previously, is a unit within Culture & Tourism and part of the Community & Social Services Department and reports to City Council through the Community & Social Services Department. All tourism services organizations, irrespective of their organization and governance, receive municipal funding which is viewed as essential to the ongoing sustainability of the organizations and the effectiveness of their programs.

5.2.3 Tourism Services Focused on Increasing Visitors from Outside the Municipality & Increasing Their Overnight Stays & Related Expenditures

The managers delivering tourism services in the benchmark municipalities view their most important goal is to increase visitors from outside the municipality and their overnight stays and related expenditures. They state that their activities are focused on improving the local economy and supporting the tourist industry to grow and prosper. They indicated that increasing overnight stays is particularly important as individuals who stay for multiple days in the municipality incur significantly higher expenditures. While they may provide advisory support to cultural events, performances, they do not provide financial support to cultural organizations unless they are a significant draw for outside visitors with extended stays. This is particularly true for tourism services organizations which are independent and have private sector boards, e.g. Kingston and Barrie. For example, Barrie will only provide support to cultural organizations who draw 30% or more of their patrons from outside 100kms of the City. The City of Guelph's Tourism Services as part of the Culture and Tourism division is focused on increasing visitors but does support local cultural organizations.

5.2.4 Tourism Organizations Believe a Tourism Marketing Strategy is Essential to Decision-making & Resource Allocation

London, Kingston, Brantford, and Chatham-Kent have an established and documented marketing strategy which guides their decision-making and targets specific markets. Kingston's strategy includes monitoring key performance indicators for tourism. Barrie has a Strategic Action Plan which was updated in 2014, and an established marketing

strategy. Each organization's marketing strategy is the basis for discussions with the local tourism industry and helps to set priorities for expenditures on marketing and product development. Guelph does not have a current marketing strategy as it last completed a strategy in 2008.

5.2.5 Digital Marketing & Communications Via the Internet Seen as Cost Effective

All of the benchmarked municipal tourism organizations are making major investments in digital marketing via the Internet. These websites are often targeted at different segments of the travel market, e.g. meeting planners, travel trade, conventions in addition to members of the travelling public.

London has a particularly effective website which provides links to attractions and events directly from its home page. This is the fourth iteration of its website and it has sought to include new features based on an evaluation of tourist requests and past traffic. Barrie has developed a family of separate websites targeted at the GTA's multicultural communities with websites in different languages and with different products. Guelph has established a new website under its new brand "Visit Guelph" and like the other benchmarked organizations is using social media e.g. Facebook, Instagram, Twitter, Pinterest to communicate with potential visitors.

5.2.6 Cities Making Major Investments in Tourist Attractions & Facilities

Several of the benchmarked cities have made major investments over the past few years in attractions and facilities to support and attract an increased number of visitors. London has invested \$48m in Budweiser Gardens and has hired a US entertainment promoter to bring events to the facility. Performances by Elton John, Bon Jovi and other acts with international appeal are packaged with hotel stays and restaurants and are attracting visitors from not only Ontario but also from New York, Michigan, Ohio and Illinois. Brantford has invested in the Gretzky Centre and like London is using the facility to develop sports tourism opportunities e.g. provincial and national tournaments. Kingston has recently built the Rogers K-Rock Centre for performing arts and like London has retained an entertainment promoter to bring events to the facility. Chatham-Kent has built a new convention centre to address the meeting and convention market.

5.2.7 Cities Have Instituted or are Evaluating the Establishment of Destination Marketing Fees

Destination marketing fees (often referred to as a "bed tax") are receiving increased attention by many Ontario cities as a means to increase financial resources available to support tourism marketing and services. Brantford and Kingston have destination marketing fees (as does Toronto, Ottawa and St. Catharines, amongst others); Waterloo Regional Tourism Marketing Corporation is currently discussing with its industry members the implementation of a destination marketing fee.

5.2.8 No Direct Involvement in Tourism Investment Attraction

None of the benchmarked tourism organizations are involved in investment attraction to develop new hotels or attractions. This is seen as an Economic Development responsibility within the City or in the case of Kingston a responsibility of a different area within the KEDCO organization. Some interviewees also mentioned that they saw this as an RTO responsibility.

5.3 Summary Charts of Benchmark Findings & Best Practices

The contributions of the tourism services managers in each of the benchmarked municipalities was essential to the creation of this summary chart and the profiles which follow. Every effort has been made to ensure the accuracy of the information which was provided by follow-up with the municipalities involved. That being said, the consultant team takes responsibility for the information provided and any inadvertent inaccuracies.

Chart IX: Municipal Tourism Organizations & Best Practices

	Guelph Visit Guelph	London Tourism London	Barrie Tourism Barrie	Brantford Tourism Brantford	Kingston Tourism Kingston	Chatham-Kent Chatham-Kent Tourism
Organization & Governance	<ul style="list-style-type: none"> • City Dept. with Culture reporting to GM in Community & Social Services • No industry advisory committee 	<ul style="list-style-type: none"> • City Dept. reporting to CAO • Industry Advisory board – 2 Council Reps. 	<ul style="list-style-type: none"> • Non-profit corp. established 27 years ago • 280 tourism industry members • Official tourism office for the City 	<ul style="list-style-type: none"> • Division of City Econ.Dev. Dept. • 3 Council advisory committees each with 7 members appointed by Council & 3-4 ex-officio liaisons (industry & community representatives) 	<ul style="list-style-type: none"> • Part of Kingston Econ.Dev. Corp (KEDCO) whose mandate is jobs & investment • Board of 13, incl. 3 councillors & mayor • Advisory committee 	<ul style="list-style-type: none"> • Division of City Econ.Dev. Dept. • Establishing an Advisory Committee
Funding - 2014 Operating Budget	\$446,376	\$1.8 million	\$400,000	\$696,275 (exc. public art development/maintenance program (\$55,000))	\$1,101,687	\$400,000
Staffing	4 FT, incl. GM & 3 PT	13 FT, incl. manager & 3 directors	3 FT & 1 PT	5 FT & 6 PT staff	6 FT, 2 PT, 6-7 seasonal (students) at Visitors Centre	3.8 staff
Marketing & Promotion	<ul style="list-style-type: none"> • No current marketing strategy • Focus on leisure & culture • Have developed new brand • Joining with RTO 4 & WRTMC on sports tourism 	<ul style="list-style-type: none"> • Well-developed Marketing Strategy <ul style="list-style-type: none"> - Leisure Travel, Advertising & Travel Media - Sports - Conventions • Aggressively pursue sports tourism using Budweiser Gardens 	<ul style="list-style-type: none"> • 4-year Strat. Action Plan <ul style="list-style-type: none"> - Targets 4-season visitors - Leverages brands of industry partners - Targets ethnic communities & immigrants in GTA • Marketing Services targeted at leisure market with vacation packages 	<ul style="list-style-type: none"> • Tourism Brantford 2013/15 Business / Marketing Plan focuses on 6 key sectors – meetings & conventions, sport tourism, leisure/touring, travel trade, day trips Ont. & US • Corporate planner brochure focused on meetings & conventions • Group package information for group travel organizers & travel trade 	<ul style="list-style-type: none"> • Marketing Plan for Tourism Kingston • 4 key markets – leisure, sport tourism, conferences, travel trade • Highlight Kingston's heritage, culture, culinary & natural resources 	<ul style="list-style-type: none"> • 2014 Tourism Plan • 4 key markets – outdoor adventure, history, festivals and business tourism • Convention centre is new

	Guelph Visit Guelph	London Tourism London	Barrie Tourism Barrie	Brantford Tourism Brantford	Kingston Tourism Kingston	Chatham-Kent Chatham-Kent Tourism
Marketing & Promotion (con'td)			<ul style="list-style-type: none"> Meetings & groups, incl. motor coach operators & event planners with complete support services in each case 			
Product Development	<ul style="list-style-type: none"> Few packages: <ul style="list-style-type: none"> UofG 50th Anniversary taste•real 	<ul style="list-style-type: none"> Has get-away packages targeted at couples (culinary, romance), families, shopping Works with industry partners to identify gaps Develop products to fill gaps Will establish Board sub-committee to focus on particular market to develop needed products, e.g. meetings & conventions Have full range of products targeting families, seniors, sports and culturally interested people 	<ul style="list-style-type: none"> Cooperative marketing with industry partners Targets programs for corp. visitors extending overnight stays Developing sport tourism program Wide range of packages, incl. <ul style="list-style-type: none"> Dining Gaming & Entertainment Romance & Relaxation Shopping Spa Escapes Has discount coupon program with partners 	<ul style="list-style-type: none"> Developed <i>Discover Brantford</i> brand Has Entertainment Play & Stay package; Girls Just Want to Have Fun package, and Grand Outdoors package for adventure travellers, & numerous other group packages Brantford Coupon Book for discounted fees at attractions, accommodations What's On & Discovery Guide listing all current attractions 	<ul style="list-style-type: none"> Decommissioning Kingston Penitentiary as attraction Approached Ripley's, Great Wolf Lodge, Park Entertainment 	<ul style="list-style-type: none"> Develop packages with convention centre First Nations site, long term project Most tourism has a regional focus, don't really have many destination attractions
Tourism Communications & Media	<ul style="list-style-type: none"> Website & using social media Smart phone app Working with RTO 4 to promote registration system 	<ul style="list-style-type: none"> 4th generation website <ul style="list-style-type: none"> Continuously updated Working with partners Early adaptor of digital media for marketing & promotion Insider report supported by blog & links to flickr, YouTube, 	<ul style="list-style-type: none"> Early adaptor of social media, e.g. Facebook, Twitter, YouTube, Instagram, Pinterest Monitored 24/7 8 websites with 5 different 	<ul style="list-style-type: none"> Uses social media to market tourism, e.g. Facebook, Twitter Brantford currently undertaking new branding exercise Has not leveraged technology & social media to 	<ul style="list-style-type: none"> Marketing Communications Dept – uses Facebook, Twitter, newsletters for consumers & industry Core part of communications plan 	<ul style="list-style-type: none"> Print for business market Social media for other markets Establishing a more consumer friendly web site for tourism

	Guelph Visit Guelph	London Tourism London	Barrie Tourism Barrie	Brantford Tourism Brantford	Kingston Tourism Kingston	Chatham-Kent Chatham-Kent Tourism
Tourism Communica- tions & Media (cont'd)		<p>Twitter & Facebook</p> <ul style="list-style-type: none"> • Multiple videos featuring different locales & restaurant sites • Separate webpages for meeting planners, sports tourism, visitors & events • Two information centres, one downtown, one on Wellington Road Gateway 	<p>languages</p> <ul style="list-style-type: none"> • Targets ethnic communities & other countries 	<p>its best advantage</p>		
Best Practices	<ul style="list-style-type: none"> • Commitment to digital media usage • Support for performing arts • Investment in City Hall Square, e.g. skating rink & downtown renewal support tourism 	<ul style="list-style-type: none"> • Works closely with partners • Sector specialists • Highly developed website & use of social media • Focus on travel trade • Stayed in US Market • Positive relationship with Council • Works with members to identify opportunity & make it happen 	<ul style="list-style-type: none"> • Industry-led non-profit org • Committed to social media • Pay to play approach generates commitment & funding from partners • Tourism First policy • Measure impact of events • Leverages stakeholder brands • Does not replicate partners efforts • Provides staff support to partners 	<ul style="list-style-type: none"> • Tourism Business / Marketing Plan • Council Tourism Advisory Committee • Strong community partnerships • No membership fees fosters cooperation rather than accountability • Capacity-building workshops with RTO3 • Collects tourism data & stats for reporting to Council 	<ul style="list-style-type: none"> • Developed Cultural & Heritage Plan • Collect economic indicators & corporate performance measures – sales calls, fam tours, beds for sport, conferences 	

5.4 Profiles of Benchmarked Tourism Organizations – London, Kingston, Barrie, Brantford, Chatham-Kent



5.4.1 Tourism London

5.4.1.1 Organization & Governance

A city department reporting to the CAO with an advisory board of industry representatives. General Manager plus 3 directors; remaining staff union employees, for a total of 12 FT staff. The advisory board has 14 members, with an executive committee of 5 members. Members represent all components of the tourism sector, including airlines, food market, performance theatre, arts council, hotels, university, major facilities (Budweiser Gardens). Board also has 2 municipal councilors. Tourism services are offered through 2 visitor centres, 1 located downtown and 1 on a major gateway into the City (Wellington Street).

5.4.1.2 Funding

Budget in 2014 was \$1.8m. Approximately 90% of funding is provided by the City through the normal budget approval process with Council. The remaining approximate 10% (\$250,000) is raised from membership fees and participation in advertising programs established by Tourism London. Membership fees average \$250/year and are graduated based on size of business.

5.4.1.3 Tourism Marketing & Promotion

Tourism London has a well-developed Marketing Strategy which is focused on 3 areas - Leisure Travel, Advertising and Travel Media; Sports, and Conventions. The Strategy is developed in close coordination with the advisory board and draws on the expertise and experience of specialists in each area. With the support of City Council, Budweiser Gardens was established as a major tourism facility to support sports tourism and the convention markets at a cost of \$48m. The facility can accommodate 10,000 people and was built in 2002. It is located in London's downtown and has helped to generate an increase in retail and service businesses in the downtown core. The facility is leased by Global Spectrum, a Philadelphia US-based media and promotion company which operates approximately 60 other venues around the world. Global Spectrum pays a base fee and share of profits to the City. This is a particularly beneficial, no financial risk arrangement for the City.

Tourism London aggressively promotes sports tourism and is actively seeking to bring major tournaments to London, including the recent World Figure Skating Championships which were estimated to bring in \$17.2m of economic benefits to the City. The City is also hosting the Memorial Cup at Budweiser Gardens in 2014. Global Spectrum brings in major musical entertainment, including such performing artists as Elton John, Cher, Bon Jovi, Pearl Jam, as well as Broadway play touring companies.

Tourism London established an online reservation system to support their marketing and promotional efforts. After several years of operation the system was closed down as the operating requirements of maintaining the room accommodation inventory were high and the hotels preferred to have visitors make direct reservations through each hotel's reservation system.

5.4.1.4 Tourism Product Development

Working with its tourism industry partners, Tourism London has identified gaps in their tourism offerings and have sought to fill them such that they now have a series of festivals and events which run throughout the year, particularly in the May – October period. Tourism London also has 4 – 5 good family attractions, as well as heritage tourism and

performing arts at the Grand Theatre. A recent new addition to the attractions is the Tree Top, a zipline adventure travel experience. Tourism London will strike a board sub-committee to give attention to a particular area. For example, there is currently a board sub-committee which is focused on Meetings & Conventions.

Tourism London places a great deal of emphasis on working closely with the travel trade in pursuit of conventions and meetings, and the development of relationships with motor coach operators has established London as a destination point for visitors from the US. While Tourism London recognizes the importance of the GTA market, it has established relationships with tour operators and motor coach lines in Quebec and in Ohio, Pennsylvania, Michigan and upstate New York. The directors attend major US travel trade association conferences, e.g. US Motor Coach Association, US National Tour Association, and has maintained these relationships even though it recognizes that the US tourism market was being affected by the events of 9/11 and associated cross-border issues. Its persistence when others have left the US market has meant that it continues to receive business which is estimated to be \$5 – 6m a year.

5.4.1.5 Tourism-Related Communications & Media

Tourism London is an early adaptor of the use of the Internet as a means of tourism promotion, marketing and communication. It is now on the fourth generation of its website, which contains information on attractions, festivals, events, hotels, restaurants and other facilities in a colourful, interactive and continuously updated format. It is also active on Facebook, Twitter, flickr and YouTube and has specifically assigned staff who work with their tourism partners to ensure information is kept up to date. They have established a mobile app for use on handheld devices and are launching a “Native” app which will assist visitors to identify local restaurants or recreational activities as they move around the City, with supportive commentary. Tourism London has also produced a range of videos showing their different attractions and has found these to be of significant benefit in attracting visitors to the City. It is tracking the use of its website and the apps so it is aware of what is effective and what is not, and it is able to adapt the content accordingly. An example of a video production is *Discover our Spirit*. This is a 60-second video which was subsidized by the City and received partner support. It has generated 40,000 views in the past year, as well as other videos featuring historical sites, restaurants and other attractions.

5.4.1.6 Tourism Investment Attraction

Tourism London has no involvement in investment attraction, e.g. hotels, waterparks.

5.4.1.7 Best Practices

1. Working closely with Tourism London members:
 - Tourism London works closely with its advisory board and tourism partners in the City to find out their needs and works together to address them. Tourism London takes pride in this working relationship.
2. Sector Specialists:
 - Tourism London has specific sector specialists in Travel Marketing & Media, Sports Tourism, and Conventions. These individuals have extensive experience, knowledge and contacts in each of these sectors which allows them to be creative and innovative in new product development and getting recognition from the travel trade.
3. Highly developed website and use of social media:
 - Tourism London recognized early on the effectiveness of these new tools to communicate with the travel consumer and has made investments which are having significant pay-offs.
4. Focus on the travel trade:
 - Tourism London continues to be involved in a major way with the travel trade and participates in many travel trade association conferences and events. One director is on the board of the Travel Media Association of Canada which provides access to over 300 travel writers. 15 – 20 of these travel writers

visit the City each year and as a result London is receiving free publicity through articles in a variety of magazines and online.

5. Stayed in the US market:

- While many other Ontario municipal tourism service organizations abandoned the US market over the past 10 years, London has continued to have a presence in this market and has benefited from their commitment.

6. A positive relationship with City Council:

- General Manager is an effective communicator and has built good relationships at the political level where councillors and senior managers recognize the importance of the tourism sector and its benefits to the economy.

7. Vision

- Working with their tourism members to identify an opportunity and making it happen, e.g. Skate Canada and the World Figure Skating Championships. Opportunity identification is backed up with sound preparation and the active participation of volunteers. In a similar fashion the City identified the LPGA tour as an opportunity and will be hosting an LPGA tournament this year.



5.4.2 Tourism Kingston

5.4.2.1 Organization & Governance

Tourism Kingston is under the Kingston Economic Development Corporation (KEDCO). KEDCO is organized into four key business units (attraction, growth and retention, tourism marketing and development, community economic development). KEDCO also has small bus entrepreneurship under community economic development. The core mandate of KEDCO is jobs and investment.



KEDCO has a separate board of 13 which reports to Council. 3 Councillors and the Mayor are on the Board which is a policy governance style board. The Board meets every other month. Prior to incorporating tourism in KEDCO, it used to operate more like a Visitor & Convention Bureau as opposed to a Destination Marketing Organization (DMO). Now funding is very different and KEDCO's budget has increased from about \$800,000 in 2004 to just under \$3 million now.

From its web site: The Kingston Economic Development Corporation's (KEDCO's) Board of Directors is a public/private Board that sets the strategic direction for the Corporation. It consists of four appointees from municipal City Council and eight appointees from the community. The Board of Directors is responsible for providing leadership in making Kingston a better place in which to live and to work -- for both existing citizens and new members of the Kingston community. The Board of Directors is appointed annually with staggered one or two-year terms.

Each of the four markets has an advisory committee – committee members are typically at the level of directors of sales and include some owner operators, except visitor services which also has retailers who can provide expertise with regard to the visitor information centre. Kingston Accommodation Partners (KAP) leads the leisure marketing committee. KEDCO leads the other three committees.

KEDCO has 17 staff with 6 full time in tourism, 2 annual part time; and 6 or 7 seasonal employees (students), during high months at visitor centre.

The following is from the 2013 Tourism Strategic Plan.

Strategic Overview

To develop and enhance the tourism sector through the positioning of Kingston as a year-round destination of choice for visitors, sport events, conferences and business travel to realize an increase in visitation and visitor-related spending.

Tourism Kingston, a division of KEDCO, undertakes tourism marketing and development initiatives to ensure that Kingston remains a destination of choice for visitors from all over the world. Tourism marketing and development activities are a key attractor of people and also serve a cross-over function of introducing businesses and potential residents to the city in both professional and leisure capacities.

The tourism sector is a vital economic driver in Kingston, accounting for close to 6,000 jobs and an estimated annual \$300 million in visitor spending. Kingston's location, physical resources, attractions, culture and heritage make it a natural vacation destination.

Tourism marketing activities will be directed towards promoting the competitive advantages the city holds in areas of Leisure, Travel Trade, Meetings & Conferences and Sport Tourism. Tourism development activities include growth and retention initiatives to support Kingston's tourism sector and advance lead generation towards the attraction of potential new products or services to augment Kingston's core tourism assets and support year-round visitor services.

Strategies

- 1. Market leisure activities that highlight Kingston's unique heritage, culture, culinary and natural resources and develop products, services, and activities to keep visitors continually coming back.*
- 2. Increase visitation from the Travel Trade sector and spending.*
- 3. Attract local, national and international meetings and conferences to increase visitation and spending.*
- 4. Attract local, national and international sport events to increase visitation and spending.*
- 5. Ensure each guest to the city has accessible visitor services information and support.*
- 6. Increase the positive travel media coverage referencing Kingston.*
- 7. Enhance services and marketing opportunities to support tourism sector base.*

Each of the above strategies is supported by well-defined tactics and associated budgets.

5.4.2.2 Funding

In 2013, KEDCO's budget was \$2.8 million of which tourism accounted for \$1.1 million. Fully 88% of the tourism revenues were provided by the city with the balance coming from industry and other sources. Kingston has a Destination Marketing Fee Program based on 3% of the room rate. Kingston Accommodation Partners (KAP), collect \$1.5 million annually from the program and KEDCO receives some funding through that source. The money is used to invest in special projects (web site), as well as programming, sports and conferences. These fees have been going

since 2004 with interruptions, including a period of experimentation with different approaches by the RTOs. The system has come full circle and Kingston (KEDCO?) is now going on its own.

KAP leads the leisure initiative for Kingston and KEDCO partners with them. KAP invests the lion's share in the leisure market, with KEDCO supporting KAP. KEDCO sits on the marketing committee and tries to align its markets with what KAP is doing. There is some cross marketing creative that takes place, e.g, \$500,000 ad campaign. Within creative, KEDCO will take KAP's design elements and incorporate it in other marketing initiatives.

5.4.2.3 Tourism Marketing and Promotion

KEDCO develops a marketing plan for Tourism Kingston each year. Strategies are developed for the key markets including leisure, sport tourism, conferences, and the travel trade. KEDCO also develops the visitors' guide and supports visitor services. KEDCO also provides support to partnership development by working with small and medium sized businesses, hotels and restaurants. Partners can buy into different programs. KEDCO also promotes networking, hosts mixers, develops two industry newsletters and all contribute to keep initiatives going. KEDCO also undertakes some media relations in support of the tourism sector.

The Kingston brand is very broad – it's all about the experience, promise and value: everything is wrapped up in the experience of Kingston. There are in effect multiple brands including Canada's first capital, a UNESCO world heritage destination, the Rideau Canal, Fort Henry, the lakeshore and 1000 islands, Bellevue House, Queen's University and RMC.

An ad campaign called the Yellow Door campaign is a KAP led initiative. The tagline is "Always a Good Time". Feeder markets are from Ottawa, Toronto and Montreal and within that there are different experiences that embody what Kingston is. Each market has its own niche. Campaigns are directed to meeting planners for the corporate market. "hosting 300 for 300" is a tagline, referring to ideal size of conference 300 delegates and celebration of 300 years of history. Sport has the tagline, "plan and play" and has developed a sports association plan. They try using visuals to incorporate the threads for the Yellow Door campaign. They've won a couple of marketing awards.

The travel trade is also a key segment of their marketing plan. The main activities include hosting Fam Tours, attending Trade shows and providing online support. They also appear in targeted media. Strategies include: (from web site):

KEDCO has strong representation at key marketplaces for both domestic and international tour operators. Trade shows that Tourism Kingston will be attending on the partners' behalf include:

- Ontario Motor Coach Association (provincial)
- Rendezvous Canada Marketplace (international)

KEDCO's objective is to:

- Sell new products and partnerships to domestic tour operators
- Provide support services to Travel Trade partners who facilitate group tours
- Encourage partners to provide current Group and FIT rates for faster follow up and distribution

5.4.2.4 Tourism Product Development

KEDCO has tried some product development and has done some trade shows and workshops on that. They work with the Investment Development Office (IDO) from time to time from the Ontario Ministry of Tourism, Culture and Sport. There is less focus on investment attraction where lead times are long. They allow the business development side of KEDCO to focus on investment attraction.

Kingston Penitentiary is the biggest product development opportunity right now. KEDCO is waiting to see the direction of Corrections Services Canada with regard to the future of the site. If the product could be developed it could be an anchor for Kingston's tourism product. Rob Carnegie sits on the Board of the Pen museum. Following decommission and audit of the facility, it would be possible to develop it as a tourism attraction and run tours.

Other events in Kingston include festivals, walking tours, theatre production, etc. and particularly require assistance from volunteers. They've invested in quite a few festivals and are seeing some growth. KEDCO typically will support events with sponsorships rather than trying to create events. They are not in the business of running those events. A possible exception would be the sports tourism market where they might help create or bid on an event and would be much more involved with volunteers compared with other festivals.

Festivals include sheep dog trials, big blues festival and a fast emerging Spirit of Kingston whisky festival which has doubled its numbers. There is also a buskers' festival, a winter festival, a Scottish festival, a film festival, and an art fest.

5.4.2.5 Tourism-Related Communications & Media.

In addition to communications activities mentioned, KEDCO manages marketing associated through the visitor information centre and does all the racking for that. They also offer a sales lead program providing leads to their partners for follow up at industry trade shows. Partners can buy into the lead program or web banners from KEDCO. They get about \$20,000 of revenue through that component.

KEDCO has a marketing communications department that does Facebook and Twitter, 2 newsletters, (consumer and industry). KEDCO has a well structured social marketing campaign which includes web based marketing strategies, an online reservation system, mobile web applications, social networking, search engine optimization, and website hosting with local partners.

There is daily maintenance on social media which is a core part of the communications plan.

5.4.2.6 Tourism Investment Attraction

KEDCO has also talked to organizations like Ripley's, and Great Wolf Lodge, and Park Entertainment. Its perspective is that there is not a lot of tourism investment in Ontario right now.

KEDCO lets investment attraction go for now and focus on investment in product and program development invest in quite a bit. Tourism investment is a tough sell. The business development side of KEDCO is more actively engaged in that market.

5.4.2.7 Best Practices

Kingston has a cultural and heritage department, which has just rolled out a sizable cultural and heritage plan. KEDCO supports them on that. KEDCO is a marketing organization. KEDCO incorporates their activities into its leisure plan.

KEDCO has developed a number of key performance metrics. This has included measuring elements of its web and social media strategy as well as producing economic indicators and corporate performance measures. Items measured include sales calls, FAM tours, visitor counts, online booking sales, tour buses, bids for sport, conferences, etc. These are produced in the annual tourism plan. They also monitor economic indicators over which they have no control for example, ADR, occupancy rates, RevPAR, etc. KEDCO watches those and can influence them if it does its job well.

Best Practices

1. Focused tourism plan
 - Tourism is a key sector in Kingston's economy. KEDCO has developed a well thought out and well-resourced strategic tourism plan which focuses on key market segments and builds on strong relationships with its industry partners.
2. Strong relationships with tourism partners
 - KEDCO works closely with the industry and Kingston Accommodation Partners (KAP) who lead the leisure marketing committee. Many programs and products are developed in close collaboration. Through the sales lead program, KEDCO is able to offer leads to its industry partners.

3. Leverage tourism dollars
 - Through the Destination Marketing Levy program, the industry is able to generate \$1.5 million of which KEDCO receives some funds from that program.
4. Social marketing
 - KEDCO has a well structured social marketing campaign which includes web based marketing strategies, an online reservation system, mobile web applications, social networking, search engine optimization, and website hosting with local partners.
5. Performance measures
 - KEDCO monitors on a quarterly basis a number of statistics over which it has direct influence as well as many indicators it indirectly influences.



5.4.3 Tourism Barrie

5.4.3.1 Organization & Governance

Tourism Barrie is a not-for-profit corporation which was established 27 years ago by local ski resorts and at that time was called “Ski Barrie”. Tourism Barrie has continued as an industry supported, non-profit corporation ever since. Tourism Barrie has 3 full-time and 1 part-time staff members. Tourism services are offered at 2 visitor information centres. Tourism Barrie provides a full range of destination marketing and tourism information services through its information services centres. The organization prides itself on its involvement with its tourism partners and its overall goal is: “Tourism Barrie in collaboration with its partners will attract visitors to authentic tourism experiences in the Barrie area, strive to satisfy them when they are here and bring them back for future visits”. Tourism Barrie has over 280 tourism industry members and, while industry driven, is the official tourism office for the City of Barrie. Tourism Barrie is governed by a 13 Board of Directors, which is comprised of 11 industry stakeholders and 2 City of Barrie representatives. Representative of Downtown Barrie – BIA, Greater Barrie Chamber of Commerce, Georgian College, City of Barrie Economic Development and the Tourism Advisor for the Ministry of Tourism Culture and Sport of invited to 4 meeting a years as Liaison Partners to the Board of Directors.

Tourism is seen as one of the key sectors of Barrie’s economy. The City has been bringing together organizationally various City activities which are involved in attracting and supporting investment in all sectors of the economy under an initiative entitled “Invest Barrie”. This initiative has brought together the City’s culture, economic development and city centre redevelopment functions and activities with the Simcoe County Airport and Greater Barrie Enterprise Centre (small business incubator). No decision in these regards has been taken by the City with respect to its relationship with Tourism Barrie.

5.4.3.2 Funding

Tourism Barrie’s budget in 2014 was \$400,000, of which \$200,000 is raised through industry member fees and through industry participation in Tourism Barrie’s marketing programs. The remaining \$200,000 is provided by the City of Barrie as a grant which is increased annually at a rate equivalent to the percentage increase in the overall City of Barrie budget. Tourism Barrie follows a pay-to-play approach to raising funds for its advertising promotional

campaigns and programs. The City also provides free rent for its information centres, which is valued at approximately \$25,000/year. Tourism Barrie is often successful in raising more than the budgeted amounts for its marketing programs because of its industry partners' willingness to commit funds.

5.4.3.3 Tourism Marketing and Promotion

Tourism Barrie has a 4-Year Strategic Action Plan 2008-2012 based on the findings, reporting and recommendations of the Ontario Ministry of Tourism, Culture & Sports Premier-Ranked Tourist Destination Project. This Strategic Action Plan was updated in 2014. Tourism Barrie has an established marketing program which is targeted at bringing visitors to the City and area in all four seasons. Rather than marketing its own Tourism Barrie brand and carrying out its marketing and promotional campaigns, it seeks to promote or leverage the brands of its partners, playing more of a supportive role in the messaging. It has several signature events, including Kempenfest and Beaverfest. Tourism Barrie is targeting the GTA market and is giving particular attention to increasing visits by new immigrants and ethnic communities and is websites in several different languages to provide information.

5.4.3.4 Tourism Product Development

Tourism product development is carried out through a collaborative process involving Tourism Barrie's industry partners. Examples of its products are: Winter Fun Barrie, which is a cooperative marketing program involving 17 regional tourism industry partners that combines outdoor activities with overnight stay packages. Shop Barrie is another program that has been developed through an industry committee and Tourism Barrie is currently exploring the development of a new sports tourism program. Barrie has established vacation packages for dining, gaming and entertainment, romance and relaxation, shopping and spa escapes. Tourism Barrie has also established a discount coupon program for visitors, with the assistance of its partners. It also provides a full range of services to event planners and the travel trade, e.g. motor coach operators.

60% of Barrie's tourism market is visitors who are coming for business purposes and Tourism Barrie works with its partners to create programs that will convert this corporate market into a leisure market by extending overnight stays and encouraging visitors to return to the area for leisure purposes. Tourism Barrie supports organizations wishing to establish and operate festivals and events. However, its support is targeted at those festivals and events where at least 30% of their participants are coming from over 100 kms away. Tourism Barrie believes that its resources should be focused on bringing visitors and their expenditures into the City to benefit the tourism industry. Tourism Barrie focuses on supporting the signature festival and events that have the resources and capacity to increase audience capacity through tourism. Tourism Barrie directs cultural organizations, where the events that they stage are seen primarily by local residents, to the City of Barrie's Culture Department, which offers support through the community and culture grants programs.

5.4.3.5 Tourism-Related Communications & Media

Tourism Barrie is an early adopter and made extensive use of social media as a means to encourage visitors to come to Barrie. It has established 8 different websites featuring 5 different languages. Some of the websites are focused on specific activities, e.g. www.golfbarrie.com. Some are focused on a specific program, e.g. www.winterfun.ca, and others are focused on attracting those from ethnic communities or from countries where a language other than English is spoken, e.g. www.tourismobarrie.com, www.tourismebarrie.com. Tourism Barrie is also actively using Facebook, Twitter and YouTube. A major commitment is made to keeping these websites current and up to date. Inquiries or comments received via the social media are monitored 24/7 and the staff are quick to respond to an inquiry or change in events. For example, a Barrie resident who has been successful in the Sochi Winter Olympics trained at one of the winter resorts. This has led to a posting on the website encouraging others to come and practice where this Olympian trained, taking advantage of the publicity which surrounds the Olympics. Tourism Barrie will be increasing its use of social media as it views this as a cost-effective way of attracting visitors. Tourism Barrie believes that as an independent organization it is better able to make effective use of social media than if it were a municipal department because its websites and use of technology are not constrained by a municipality's security and technology requirements.

Tourism Barrie has been investigating the potential for establishing a booking system for accommodation on its

website to promote experiential stay and play packages. This idea has been gaining some traction, despite its cost, as the hotels are increasingly dissatisfied with the fact that they are having to pay up to 40% of the potential revenue from their rooms to OTAs (online travel agencies, e.g. Expedia).

5.4.3.6 Tourism Investment Attraction

Tourism Barrie has no involvement in investment attraction, seeing this as the responsibility of the City's Economic Development Department.

5.4.3.7 Best Practices

1. Industry-led non-profit organization:
 - Organization which has a minimal annual administrative fee (membership) of \$125 which pays for inclusion of the tourism businesses' information on the Tourism Barrie websites and the placement of the tourism businesses' information in Tourism Barrie's visitor information centres and allows the businesses to participate in Tourism Barrie's promotional and marketing efforts.
2. Commitment to social media:
 - Tourism Barrie is committed to the expanding use of use of social media for marketing and promotion.
3. A pay-to-play approach:
 - An approach which generates commitment and funding from industry partners for marketing, promotion and product development. Tourism Barrie established a working committee for each of its major programs, e.g. Winter Fun, and consults with each of its stakeholders, e.g. hotels, resorts, on how they would like to see the program changed or refocused for the coming year. Tourism Barrie then prepares a report describing what the new program will be and why, and by consulting with its partners to ensures that the program will be successful and has "staying power" such that partners are willing to commit year after year to support the program.
4. A Tourism First policy:
 - Tourism First recognizes that Tourism Barrie's responsibilities are to support its industry stakeholders and to support the corporate market first as it represents the largest visitor segment, and to try and leverage the corporate market to build the leisure market.
5. Leveraging stakeholder brands:
 - Hotel and resort logos are featured prominently in advertising campaigns, rather than Tourism Barrie directly.
6. Not replicating the marketing and promotional efforts of its industry partners:
 - Tourism Barrie recognizes that its industry partners often have their own marketing and promotional staff and strategies. Tourism Barrie recognizes this and seeks to do marketing, promotion and program development in areas where others are not active, e.g. shoulder season, ethnic market.
7. Providing staff support so that tourism partners are decision-makers, not doers:
 - Tourism Barrie supports marketing and product development committees, providing staffing, minute taking, meeting rooms and other administrative support such that the time of its tourism partners can be used most effectively in making sound business decisions.



5.4.5 Tourism Brantford

5.4.5.1 Organization & Governance

Tourism Brantford is a destination marketing organization that seeks to effectively market the multitude of unique attractions in Brantford and area to maximize tourism potential. Its overall goal is to increase the number of visitors to Brantford and to maximize their impact to the local economy.

Tourism Brantford is a division of the Economic Development & Tourism Department at the City of Brantford. Tourism has been a part of economic development since 2001. Tourism Brantford is guided by the following 3 Council advisory committees with both councillor and industry/community members:

1. City of Brantford Tourism Advisory Committee
2. City of Brantford Cultural Advisory Committee
3. City of Brantford Economic Development Advisory Committee

Each committee has approximately 7 members who are appointed by Council and 3-4 ex-officio liaisons. The committees serve to provide council with feedback regarding tourism related challenges and opportunities, to bring forward issues of interest and to act as a sounding board for staff in the tourism division. The function and mandate of all City of Brantford advisory committees is presently under review by City Council.

Tourism Brantford also has the Tournament Capital of Ontario which is a board of industry and community representatives who assist in the pursuit of tournaments and sport tourism events in partnership with the city. This Board used to be affiliated with the Parks and Recreation Department but it's advisory affiliation was moved to the Tourism Division in 2013.

Tourism Brantford has three main service areas: Marketing, Communications & Public Relations; Business Retention + Expansion (BR+E), and Visitor Information Services

The Tourism Division at the City of Brantford is made up of 5 full-time and 6 part-time staff. Their positions are as follows: Manager of Tourism and Marketing (FT – presently on long term leave), Visitor Services Coordinator (FT), Arts and Culture Coordinator (FT), Tourism Information Coordinator (FT), Tourism Business Development Officer (FT), Marketing Assistant (PT) and 5 Tourism Counsellors (PT). There are some challenges at present having the Tourism Manager on long-term leave.

5.4.3.2 Funding

Tourism Brantford has no industry membership fee and is funded for the most part by taxpayer dollars. The operating budget in 2014 is \$751,275. This includes \$55,000 for a public art development / maintenance program. Therefore, direct tourism-related funding is \$696,275.

The Brantford Hotel Association includes 4 hotels. Hotels charge a 2.86% hotel/room fee, and collect and manage this money themselves. The City is able to leverage some of this revenue to help support tourism through joint or complementary marketing programs. The following provides a more detailed breakdown of the marketing component of the budget:

TOURISM DIVISION BUDGET

2014 operating budget: \$696,275 excluding public art development / maintenance program of \$55,000 of which \$35,000 is contributed to a reserve fund. Revenues are \$25,125, broken down as follows:

Earned Revenues (sales, rentals, fees, etc.)	\$ 4,700
Advertising / sponsorships	\$14,925
Grants / partnerships	\$ 5,500

Net expenditures in six core markets include:

Sport Tourism (\$10,795)
Leisure (\$9,400)
Meetings & Conventions (\$6,290)
Travel Media (\$4,675)
Cultural Tourism (\$3,385)
Group Travel (\$2,147)

5.4.5.3 Tourism Marketing and Promotion

In 2013, Tourism Brantford created the Tourism Brantford 2013/15 Business/Marketing Plan: "Connecting and Building Together". This is a highly comprehensive document with a focus on marketing activities within six key sectors and corresponding destination management efforts. This plan outlines the individual objectives, strategies and tactics that the division will apply and implement for each marketing activity throughout the coming year, including various 2013-15 marketing opportunities available through Tourism Brantford. Market priorities for Brantford include: meetings and conventions, sport tourism, leisure/touring, travel trade, Ontario, tier 1 U.S. and primary day trips. Brantford has developed marketing brochures and supportive packages relative to each of these target markets, e.g. Group Package Information.

5.4.5.4 Tourism Product Development

Brantford has several packages: Entertainment Play & Stay package; Girls Just Want to Have Fun package, and Grand Outdoors package for adventure travellers aimed at the leisure market.

Brantford is home to the Glenhyrst Art Gallery of Brant located in Glenhyrst Gardens. Named one of the Top 100 Festivals and Events in Ontario, tourists can visit the Brantford International Villages Festival which celebrated their 40th anniversary in 2013. There is also the Canadian Military Heritage Museum or the Bell Homestead National Historic Site. Brantford is recognized as the "Tournament Capital of Ontario" supported by the Tournament Capital of Ontario Committee. Brantford is home to many sporting events throughout the year as well as the newly-renovated Wayne Gretzky Sports Centre. Many local businesses and events take place at Harmony Square. In the downtown area there are performances at the Sanderson Centre for the Performing Arts. Also, Brantford has the OLG Casino Brantford.

Tourism Brantford also produces the annual Brantford, Brant, Six Nations and New Credit Discovery Guide, and coupon book in partnership with other area communities. The official Tourism Brantford website, Discover Brantford (www.discoverbrantford.com) offers a digital version of the guide and other publications. The Brantford Coupon Book for visitors to allow discounted fees at local attractions, accommodations. Tourism Brantford also publishes a guide to Brantford and Area Festivals and Events called "What's On".

5.4.5.5 Tourism-Related Communications & Media

Brantford has created the Discover Brantford brand and has a separate tourism website. Tourism Brantford effectively uses social media to help market tourism. They currently have a Facebook page, twitter account and a Pinterest forum to communicate and post information about tourism events etc. At present there are some branding inconsistencies. The entire corporation of the City of Brantford is currently going through a re-branding exercise

therefore all departments are waiting for the corporate rebranding to take place before they engage further marketing initiatives. Once the corporate re-brand has been adopted the tourism department hope to better formalize branding efforts. The corporation is also looking at issuing an RFP for a communications strategy shortly.

Brantford has communicated that it has challenges with the limitations of IT when it comes to leveraging technology and using social media.

5.4.5.6 Tourism Investment Attraction

There will be a new Palladium opening in Brantford comprising of a “Wacky Wing” restaurant and large interactive video gaming complex. This is more than a municipal attraction and involves private sector involvement and industry support. (This facility opened in March, 2014)

5.4.5.7 Best Practices

1. Having a documented strategy:
 - Tourism Brantford 2013/15 Business/Marketing Plan: “Connecting and Building Together” which articulates, goals, market priorities etc.
2. City of Brantford Tourism Advisory Committee
 - Very supportive and helpful. Acts as ambassadors in the community and helps guide the direction of tourism in Brantford.
4. Strong Community partnerships:
 - Strong community partnerships “good trustworthy relationships” e.g. with the Brantford Hotel Association, Museum and Galleries Association
5. No membership structure:
 - Absence of a membership structure helps to foster an environment of cooperation rather than accountability
6. Hold capacity building workshops with RTO 3:
 - Capacity building workshops with RTO 3 e.g. How to complete a grant application? How to measure event success, etc.
7. Measuring and reporting tourism usage and statistics:
 - Collecting this data is very helpful when it comes to reporting back to Council.



5.4.6 Chatham Kent Tourism

5.4.6.1 Organization & Governance

The Economic Development Services group is a municipal department reporting to the CAO. Tourism has its own manager and is a group within the Chatham Kent Economic Development Department and has been that way since amalgamation in 1998.

There is a Chatham-Kent Economic Development Advisory Committee Council. A Tourism Advisory Committee is just being established with a scheduled meeting March 25th, following a Stakeholder Summit. A member of the TAC will be appointed to the CKEDAC. There are 3.8 FTEs in tourism. A manager has just retired and they will be recruiting for a replacement shortly.

5.4.6.2 Mandate

Economic Development Services' mandate is to work to attract new business, investment and talent to the municipality of Chatham-Kent (CK), support and encourage local business retention and expansion, grow small business, and promote the municipality as a tourism destination. Tourism Development Services provides support to the local tourism sector through tourism destination marketing, develops partnerships with local tourism operations and attractions, and operates seasonal visitor information services.

5.4.6.2 Funding

The tourism budget is \$400,000, which has not changed much in recent years. Fully, 100% of funding is from the municipality. The municipality has periodically talked about a hotel tax in the past, but the industry didn't want to adopt it at that time. The subject has been revisited in the past year.

Activity	Budget
Staff Related 3.8 – wages, labour burden, car allowance and local mileage, cell phones	\$251,714
Conferences/Seminars/Training/Meeting Expenses/Travel	\$10,000
Advertising/Promotional Expenses	\$104,250
Product Development	\$8,000
Tradeshows/Marketplaces	\$15,600
Signage	\$10,000
Miscellaneous	\$1,099
Exhibition Revenue	(\$3,000)
Total	\$397,663

5.4.6.3 Tourism Marketing and Promotion

The municipality has a Tourism Plan which was presented to about 50 industry stakeholders recently. Tourism marketing focuses on four key areas shown below with the municipal tourism budget for each.

- Outdoor Adventure (\$26,000)
- History & Cultural Attractions (\$67,000)
- Summer Fun & Festivals (\$10,000)
- Business Tourism (\$24,000)

A challenge is that the marketing budget is not large and the challenge is to stay focused on the four marketing areas. Discretionary marketing funds are about \$130,000 which are allocated to print, media and social media. Heavier use of print is undertaken to support business tourism, particularly to raise awareness of the new John D. Bradley convention centre. The cost of the Centre was about \$20 million which opened in May 2012. The Centre is operated by Compass and is a cost centre under Economic Development which lost \$265,000 in 2013.

As far as brand development, Council has just approved a brand for Chatham-Kent with the tagline "Cultivating Growth, Shore to Shore".

“Cultivating Fun” is a parallel tagline used for promoting CK’s tourism brand. The primary focus of tourism is on those within a regional market, primarily day trips, up to a 3 hour drive. Apart from black history and perhaps the 1812 parkway, the area lacks compelling tourism attractions generating overnight destination type visits. The black history sites have been successful in the past with attracting US group tours. The area is also known for its birding, fishing and some festivals. There are also several assets in the area including the recently upgraded Capitol Theatre operated by St. Clair College and the Kiwanis theatre in the Chatham Cultural Centre which also has an art gallery and a museum. Milner House, Ridge House, ARTspace as well as several local museums are other important cultural institutions.

CK has also been working through its economic development side to increase awareness of the new convention centre. Conventions can only accommodate 250 to 300 people because of lack of accommodation. The focus therefore is on attracting and hosting smaller regional meetings, for example, companies with dealer organizations (e.g., John Deere) or anyone with dealer or sales meetings. The area also offers recreation such as golf and fishing which can be appealing. The convention centre can be booked for 20% of the cost of a Toronto location.

CK also tries to plug into southwestern Ontario regional programs including SWOTC marketing programs whenever possible. These focus on the area from the GTA to Windsor.

5.4.6.4 Tourism Product Development

CK conceptualizes two ways of looking at product development including (1) conceptual, for example, building packages with the convention centre to attract business tourists; and (2) promoting unique tourism assets in the area. For example, this would include the First Nations’ site Aamjiwnaang as an indigenous tourism product. They have wigwams on the reservation, but the tourism product is nowhere near where it has to be. If it were developed more, it would fit well complementing group tours of black history. The municipality is working with the first nations group to develop and promote its product, for example, through providing help with the basics of signage, promoting a welcome centre, helping with training and marketing.

The area is not well recognized for its festivals. Key festivals include the Wallaceburg Antique Motor Boat & Outing (WAMBO), Retrofest, Country Boothill Jamboree, Bothwell Old Autos Car Show, and Fire Fest. Attendance at festivals is up 46%. There is some funding for festivals, a community partnership fund of \$200,000 which can be applied for based on 50/50 matching of dollars. This is not through the tourism or economic development budget.

5.4.6.5 Tourism-Related Communications & Media.

Marketing efforts are supported through targeted print advertising on “things to do in CK”, as well as a social media campaign. Last year the focus was on outdoor billboards, this year there is more of an effort to balance print advertising with social media as it is easy to burn through their \$130,000 budget very quickly. With social media they have been grappling with Facebook, YouTube, Twitter and Instagram which has been managed internally and are used for leisure rather than business tourism. The social media campaign budget is \$35,000.

There are also two web sites devoted to tourism including (1) the municipality has a tourism page or two; and (2) they are just going to launch a stand-alone site with operators dedicated to tourism. They will also be redirecting social media to that site. The municipality funded the site and the stakeholders have put it together. They are looking into using it for accommodation bookings, but a special TICO license is required to book online.

5.4.6.6 Tourism Investment Attraction

CK doesn’t go searching out investment attraction. The mayor does this in a fairly aggressive way. Investment attraction is supported by Economic Development which is currently trying to assist in the development of a new major regional attraction, a Kalahari Water Park. There are a number of groups within Economic Development that can assist with tourism investment including a small business unit, investment attraction, investment retention and expansion.

Other municipal departments include a recreation department which focuses on the quality of life of residents, including the culture and heritage department under community services. Together they have small marketing budgets (\$13,000). Economic development coordinates with them as much as possible.

5.4.6.7 Best Practices

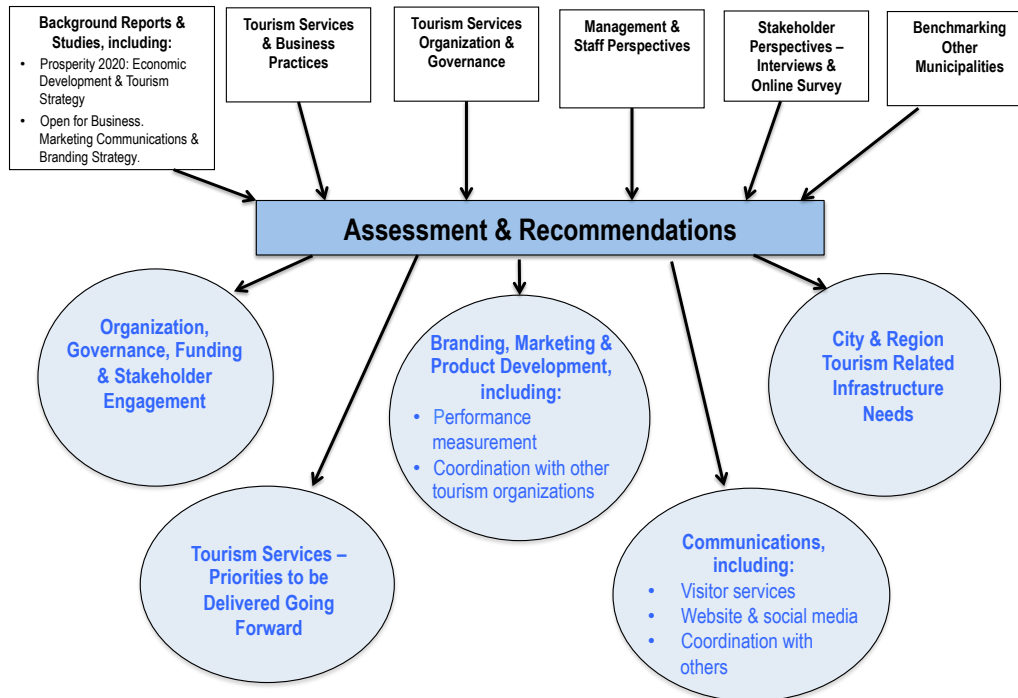
1. Focused tourism plan
 - CK does not have a large budget for tourism, but has recently developed a thoughtful targeted marketing plan which seeks to optimize tourism expenditures in four market segments.
2. Balance of print and social media
 - CK is using its print media to market to and communicate with the business tourism and convention centre market. It is using its in house staff to promote various social media to market primarily to the leisure markets.
3. Leverage other tourism organizations.
 - CK is using other regional tourism organizations to the extent possible to maximize its tourism promotion expenditures.
4. Value for money
 - It has developed a thoughtful and cost effective approach to market its tourism assets.
5. Building stakeholder relations
 - CK is in the process of establishing a Tourism Advisory Committee to promote the area's tourism assets more efficiently and effectively.

In Section 6.0 of this report we present our Assessment of Guelph's Tourism Services and the implications of this Assessment for the Recommendations which can be found in Section 7.0.

6.0 Overall Assessment of Guelph Tourism Services & Recommendations

This Assessment brings together the findings from our review of previous reports and strategies; our review of the department’s tourism services and business practices, its organization, funding and governance; City management and staff perspectives; the views of stakeholders as expressed through interviews and the online survey; the benchmarking with tourism services as delivered in other benchmarked municipalities, as illustrated in the accompanying Chart.

Chart X: Basis for Assessment & Recommendations



6.1 Guelph Tourism Services has Experienced Significant Change & Uncertainty

Tourism Services has gone through a period of change and uncertainty over the past 3 years. Prior to 2013 Tourism Services was part of the Economic Development Department. In March 2010 the Economic Development, with the assistance of a consultant, prepared the *Prosperity 2020: Economic Development & Tourism Strategy* and pursuant to this the Economic Development Department prepared the *Open for Business. Marketing Communications & Branding Strategy* which established a new brand for economic development and tourism as captured in the “Invest Guelph” and “Visit Guelph” logos and imaging.

In 2012 a corporate reorganization brought the Economic Development Department together with Downtown Renewal and Community Energy Initiative into a new division called Enterprise Services. At this time Tourism Services was transferred from Economic Development to Culture, a division within Community & Social Services Department. The rationale for the linkage of tourism services with Culture was that the City manages several facilities, i.e. Sleeman Centre, River Run Centre, and that there could be synergies in the management and coordination of events and performances which could support tourism objectives. Shortly thereafter in February 2013 Guelph City Council made

the decision that they wished to provide an opportunity for the tourism industry in Guelph to assume responsibility for the delivery of tourism services with the financial assistance of the municipality.

To this end, Tourism Services began the preparation of a request for proposal (RFP) document and, as part of the process, undertook a consultation with the tourism industry in March 2013. The input from the industry was used to finalize the RFP document and the RFP process was initiated in June of 2013. The City received two submissions and after a thorough review, including input from an independent third party, the CEO RTO 4, the City determined that neither of the submissions fully met the requirements of the RFP and a decision was then taken to undertake this Operational Review to determine the best service delivery model and range of services which should be provided with the objective of increasing tourism in Guelph.

All of these activities created uncertainty and concerns amongst Tourism Services staff. Tourism Services staff were further impacted by the resignation of the Supervisor, Tourism Services. The transfer of staff into and out of the Tourism Services department to other City departments also affected staff morale and service delivery. The uncertainty and concerns also extended to external stakeholders in the community, including hotel and hospitality, cultural event organizers, and other tourism businesses. The changing management and staffing was also disruptive to the delivery of tourism services. The delivery of tourism services was also constrained by a lack of funding both from the municipality and the industry. Constraints were put on Tourism Services' expenditures and no commitments were made with respect to future funding as the municipality went through the RFP process. Also, because of this and recognizing that it could not provide a full range of services to industry, the department decided that it should not ask its industry partners to pay a membership fee for 2013.

6.2 Tourism Services Organization, Governance, Funding & Stakeholder Engagement

6.2.1 Organization & Governance

Guelph Tourism Services is a unit within the Culture & Tourism division of the Community & Social Services Department of the City of Guelph's municipal administration. Guelph Tourism Services reports to the General Manager, Culture & Tourism. The Culture & Tourism Division includes responsibility for the City's Museums, Sleeman Centre, River Run Centre, Cultural Development and Tourism Services. Guelph Tourism Services reports to Council through the Community & Social Services Committee of Council. As part of the Community & Social Services Department, Tourism Services participates in the decision-making and budgeting processes which are shared with other units that have as a common goal social and community development. This presents a challenge to Guelph Tourism Services as its programs are economic and business focused, although many of the City's cultural organizations have events which attract visitors. Reporting and funding approvals through the Community & Social Services Committee have tourism services weighed against social and health programs and related funding. Some tourism industry members view the organizational linkage with Community & Social Services and Culture as not recognizing that tourism is a business focused economic sector. That being said, the City of Guelph is making a significant financial contribution to supporting Guelph Tourism Services economic sector support activities, and accountability for these expenditures to the taxpayer cannot be lost in any change to its organization or governance.

Tourism Services has had difficulty carrying forward on the strategic directions as put forward in *Prosperity 2020: Economic Development & Tourism Strategy* and the *Open for Business. Marketing Communications & Branding Strategy*. It has implemented some but not all of the recommendations. To do so requires that tourism support services have a clear vision and mandate for the future so that municipal and industry resources can be brought together in the most effective manner towards a common purpose or goal. There has been a loss in forward momentum in tourism services development and delivery over the past two years. Whether tourism services were to remain in the municipality or delivered through an alternative arrangement, municipal commitment and financial support, which is currently in question by both staff and industry stakeholders, needs to be clarified going forward.

While one of the reasons for bringing Tourism Services and linking it organizationally to the management of City facilities in the Culture & Tourism division was expected synergies, but these have not been realized as yet. Both Culture and Tourism Services management and staff recognized this but indicated that this was due in part over the uncertainty as to how and by whom tourism services would be delivered in future. The Manager of Cultural

Development and the facilities managers see potential in working more closely with Tourism Services staff to bring activities to the City's facilities which would draw tourists. However, it was noted by the staff in both areas that these facilities are often unavailable for events which would attract tourists because they are currently being booked for local community and recreational activities, e.g. local hockey leagues. More effective planning and coordination could make these facilities more available for sports competitions, trade shows, and other events which could attract tourists.

Based on our staff interviews and surveys, we believe the Tourism Services Supervisor and staff to be committed professionals who are desirous of providing the best possible services to support the increase of tourism in the City. Likewise, based on our industry stakeholder interviews and survey, we believe that the tourism industry in Guelph wishes to work together with the City and amongst themselves to increase tourism in the City.

Moving forward, the delivery of tourism services must meet the expectations of City Council if municipal funding is to be continued. The tourism industry will need to be fully engaged and make a financial commitment as well. A clear vision and mandate for the future of tourism support services in Guelph is needed. An organization, governance and service delivery model which better supports tourism, involves industry stakeholders and ensures accountability for the expenditure of any taxpayer dollars is needed.

In considering possible organization, governance and service delivery models which Guelph could establish to optimize tourism service delivery and increase the number of visitors to the City, the following key success criteria were used as a guide to the development and consideration of options:

- Continuity with existing services and programs and programs should be maintained
- Industry engagement must be enhanced; industry direction should be encouraged
- Need for perception of stability and reliability within the industry required
- Must be capable of delivering, at a minimum, the tourism services seen to be a priority by stakeholders - marketing, advertising and promotion; product development; market research; branding, and support for entrepreneurship and small business development, as well as effective member services which support engagement and provide opportunities for networking and information sharing
- Must make the best use of available resources and expertise
- Must provide assurance and appropriate accountability for taxpayer dollars associated with municipal funding
- Must represent the full range of stakeholder interests – hotels and other accommodation providers; tourism-related businesses; cultural event organizers; sports organizations; attractions; transportation; the University of Guelph; business associations, e.g. Chamber of Commerce, Guelph Downtown Business Association
- Must provide efficiency and effectiveness of service delivery
- Must ensure sustainability over the long term

It is clear that the current status quo organization and governance model does not fulfill these criteria adequately.

Possible models would include:

- Revitalized Municipal Department With Industry Stakeholder Advisory Committee
A revitalized municipal department with industry stakeholder advisory committee providing guidance and direction with respect to marketing, product development and other priority services. An alternative visitor information services delivery approach would need to be a component of this model. The department could stay within Culture & Tourism, or be located elsewhere organizationally within the municipal administration, e.g. Enterprise Services, with Economic Development, Downtown Renewal & Community Energy Initiative.

➤ Independent Non-Profit Corporation with Board of Industry Stakeholders

The private non-profit corporation could be an independent organization established for the purpose of providing tourism services without any direct relationship to any business or community organization, or the tourism services could be provided ancillary to other services provided by an existing business or community organization, e.g. chamber of commerce, downtown business association. The organization would require municipal funding, as well as industry stakeholder funding. The non-profit corporation would determine the services to be provided and retain its own staff.

Recommendation #1: It is recommended that the City of Guelph support the delivery of tourism services through a revitalized Tourism Services department with a Tourism Industry Stakeholder Advisory Committee (TISAC). Tourism Services should remain with Culture & Tourism, but its service delivery should be guided by the Advisory Committee. A new approach to the services and operation of the tourism information centre at City Hall needs to be developed (see also Recommendation #21)

The rationale for this recommendation is as follows. The Tourism Services unit is currently providing most of the priority services. While there could be improvements to the service delivery, the industry stakeholders through the interviews and their responses in the online survey indicate a general satisfaction with the quality and effectiveness of these services. The exception to this are the services provided by the information services centre at City Hall. The services are seen to be ineffective and the location and hours of operation are not supportive of serving the travelling public in an effective manner and this was identified by many stakeholders. An alternative approach to the provision of these services needs to be developed.

The City is providing the major financial support for service delivery and would need to continue to do so in the future to ensure long-term sustainability. The City's budgeting and reporting processes provide a more effective means for ensuring appropriate accountability for these taxpayer dollars than would be a contractual arrangement and an arms-length relationship as would be the case with the independent non-profit corporation model. Industry engagement can be enhanced through the establishment of a tourism advisory committee (8 – 12 members) which represents the full range of stakeholders and their interests. Differing concerns and priorities have been expressed amongst the stakeholders in the interviews and survey. It is less likely that the full range of stakeholders and interests would be addressed through a private board which would determine its own membership policies and representation. In the revitalized municipal model Tourism Services management and staff can act as facilitators of discussions of these differing concerns and priorities and provide opportunities for networking and information sharing.

Tourism Services management and staff have the expertise and experience to continue forward and maintain existing programs. If the independent on-profit corporation model was adopted there would be a further period of disruption and further loss of momentum which would add to the current uncertain environment. Also, it is likely that with the independent non-profit corporation model there would be less certainty for ongoing and increased municipal funding as there would be greater expectations that the industry stakeholders contribute the majority of the funding in the longer term. Municipal funding is the predominant source of funding for tourism services in the benchmarked municipalities (see Section 6.2.2 which follows). This could lead to significantly higher membership fees, which would be detrimental to the small and medium-sized businesses and to long-term sustainability.

6.2.2 Municipal Funding

All of the benchmarked municipalities provide funding to support tourism services, marketing, promotion and product development. In most cases they also provide rent-free space (not included in their budgets) to support the provision of tourism services with much of this space used for their tourism information centre. Municipal support for tourism services is prevalent because municipalities recognize that tourism brings economic benefits that are wide ranging in the community, support many small and medium-sized businesses that lack the resources to attract tourists on their own, and provide employment for many residents. As stated earlier, because tourism dollars are brought into the City from outside like manufacturing where product sales also bring dollars into the City from outside, these dollars contribute to economic growth. (This is not the case for dollars spent in retail and services by residents which only circulates existing dollars within the community). Using Ontario Ministry of Tourism, Culture & Sports and 2011

Statistics Canada data, visitor spending in Guelph/Wellington was \$171.8m/year, contributing to the creation of over 2,000 jobs and \$68m in wages and salaries.

The funds available to tourism services organizations has a major impact on their ability to be innovative and provide a full range of marketing and product development services Chart summarizes the funds available to these organizations and their sources. As can be seen from Chart XI below, Kingston, Brantford and London have significantly higher budgets than Guelph. Kingston and Brantford have more than double the per capita municipal contribution of Guelph and Chatham-Kent. London has a 25% higher municipal per capita contribution than Guelph and, because of its large population, has the largest available budget of all the municipalities, followed by Kingston.

It should be noted that in all municipalities the financial contribution of industry stakeholders is far less than is the municipal contribution, with the exception of Barrie. Based on the interviews and online survey Guelph industry stakeholders indicated that they believe the City should be the major contributor to tourism services but most state that their industry should also contribute. Small to medium-sized businesses are most concerned about cost and would support a more graduated fee structure. About 25% - 30% of industry stakeholders would see a destination marketing or service fee as a possible source of funding. Kingston, Brantford, St. Catharines, Ottawa, Toronto, amongst others, have a destination marketing fee. Waterloo Regional Tourism Marketing Corporation is considering the establishment of a fee. Kingston and Brantford, while not receiving these funds directly, are able to leverage these funds with their own budgets, which means that overall available dollars are increased to support tourism marketing and product development.

Chart XI: Tourism Services Funding – Comparative Benchmarking

	Guelph Visit Guelph	London Tourism London	Barrie Tourism Barrie	Brantford Tourism Brantford	Kingston Tourism Kingston	Chatham-Kent Chatham-Kent Tourism
Budget 2014	\$446,376	\$1.8m	\$400,000	\$696,275*	\$1,101,687	\$399,887
Municipal Contribution	\$375,676	\$1.6m	\$200,000	\$671,150	\$966,644	\$399,887
Industry Contribution (paid for advertising, membership fees, sponsorships etc.) (excluding DMF)	\$ 70,750	\$210,000	\$200,000	\$14,925**	\$135,043	\$0
Per Capita Municipal Contribution	\$3.08	\$4.37	\$1.47	\$7.14	\$7.84	\$3.69
Industry Contribution as a % of Total Budget	15%	12%	50%	3%	8%	0%

Brantford: *excludes public art development / maintenance program; ** excludes grant (\$5,500)

Recommendation #2: The City of Guelph should reconfirm its ongoing commitment to financially support the delivery of tourism services to increase the number of visitors, in cooperation with industry stakeholders.

- Recommendation #3: The City of Guelph should consider increasing its financial commitment to Guelph Tourism Services. This increased financial commitment would be for tourism marketing, promotion, product development and to increase tourism supportive programming and events at the Sleeman Centre and River Run Centre. It should be based on a plan developed by Guelph Tourism Services in consultation with the Tourism Industry Stakeholder Advisory Committee and approved by Council, incorporating specific targets and performance measures. (See also Recommendation #18 – Sports Tourism).
- Recommendation #4: The City of Guelph should give consideration to the establishment of a destination marketing fee (bed tax), in consultation with its tourism industry, to increase the availability of funds to support visitor attraction, tourism marketing, promotion and product development.
- Recommendation #5: Guelph Tourism Services should seek to develop sponsorships and other private financing vehicles to support the marketing and promotion for tourism-related events in coordination with its industry stakeholders and event organizers.
- Recommendation #6: Guelph Tourism Services should seek to reduce its overall costs for print publications by making them increasingly self-financed through participation by its tourism partners and through expanded use of digital media.
- Recommendation #7: As part of its annual planning and to increase the availability of financial resources, Tourism Services should actively seek to leverage other sources of government funding from RTO 4, the Ontario Ministry of Tourism, Culture & Sports, and the federal government.

6.2.3 Stakeholder Satisfaction & Engagement

Based on our stakeholder interviews and online survey, in general, stakeholders are satisfied with the services being provided by Guelph Tourism Services. However, Guelph's tourism stakeholders want to have a greater role in the planning, decision-making and delivery of tourism support services. In many cases stakeholders are unclear of the services being provided by Guelph Tourism Services and their effectiveness, e.g. tourism information centre. Becoming a member and paying the annual fee provides stakeholders with advertising-related benefits, but, for the most part, this is the extent of their involvement. In other municipalities, e.g. Barrie, London, Kingston, Brantford stakeholders, through advisory committees and boards, participate in the planning for tourism services and the development of new products. This builds support for marketing campaigns and for launching and sustaining new products as stakeholders see their ideas reflected in the packaged product and they become "ambassadors", encouraging other stakeholders to join in and participate, e.g. providing a discount on meals at their restaurants to visitors attending a particular event in the city.

While Guelph Tourism Services has had some success with the development of its partnerships, gaining their support for basic tourism listings, marketing and promotion, it has had some challenges in establishing relationships with some of the larger industry participants, e.g. some of the major hotels, GO Transit and VIA Rail. This is an area which will need further attention in the future.

More opportunities for industry stakeholders to participate in tourism services planning, decision-making and delivery going forward is needed. They would also like to have more opportunities to network with other industry stakeholders and believe that Guelph Tourism Services should be doing more outreach and communications.

The lack of an industry advisory committee or board means that Guelph Tourism Services does not have advocates for their product marketing and development with other tourism-related businesses in the City which are not members. The tourism partners would like more information demonstrating the value of tourism marketing and the products which have been promoted and there is no formal partnership feedback program to gauge partner satisfaction.

- Recommendation #8: Guelph Tourism Services should establish a Tourism Industry Stakeholder Advisory Committee to better engage with the tourism sector and to increase their involvement in the planning, delivery and decision making with respect to tourism services. The Tourism

Industry Stakeholder Advisory Committee should have 8 – 12 members and include a broad range of industry and community representatives, including hotels and other accommodation providers; tourism-related businesses; cultural event organizers; sports organizations; attractions; transportation; the University of Guelph; business associations, e.g. Chamber of Commerce, Guelph Downtown Business Association. With the assistance of the Tourism Industry Stakeholder Advisory Committee, Tourism Services staff should prepare an annual report summarizing the past year's service delivery accomplishments and effectiveness in increasing tourism, as well recommended future priorities for tourism services. Included in this report should be the results of an annual partnership satisfaction survey and performance measures (see also Recommendation 20).

- Recommendation #9: An information / planning session(s) to review this report's recommendations should be undertaken first with the new Tourism Industry Stakeholder Advisory Committee. With the Committee's support and advice on an agenda, a one-day workshop to which all tourism partners / members are invited should be held to facilitate implementation of the recommendations.
- Recommendation #10: With the Tourism Industry Stakeholder Advisory Committee's support, two sub-committees, one committee to focus on marketing and promotion, and the other on new product development should be established. These committees would meet with Tourism Services staff to assist with future planning in each of these areas.
- Recommendation #11: Create a Guelph Ambassador program with tourism partners and others in the community to promote Guelph as a tourism destination. Provide these ambassadors with appropriate marketing and promotional collaterals / kit which they could use to inform people from outside the City with whom they have contact through their business, service club, sports or cultural organization activity.

6.3 Tourism Services Which are Valued by Stakeholders & Which Should be Priorities Going Forward

The tourism services most valued by stakeholders are:

- marketing, advertising and promotion
- product development
- market research
- branding
- support for entrepreneurship and small business development.

Support for assistance with management development, labour force development and training was deemed to be of lesser need by stakeholders. Stakeholders also viewed that development of a quality assurance program and the organization and participation in consumer and travel trade shows as not priorities. Attracting new tourism investment was seen as a somewhat lesser but still important service. It is noteworthy in this regard that in the benchmarked municipalities tourism-related investment attraction is provided by their economic development departments separate from the delivery of tourism services or, as in the case of Kingston, by a separate economic development corporation.

Given the industry's desire for greater engagement in priority-setting with regard to tourism services delivery, its support marketing, advertising and promotion; product development; market research; branding, and for entrepreneurship and small business development, should be respected. It should be noted that these services are provided by a majority of the benchmarked municipalities with which Guelph competes.

- Recommendation #12: The City of Guelph's Tourism Services department should ensure that it is providing, at a minimum, the priority services identified by industry stakeholders with available resources - marketing, advertising and promotion; product development; market research; branding,

support for entrepreneurship and small business development. These services should be complemented by an effective services program which includes increased opportunity for member networking and information sharing.

Recommendation #13: Investment associated with hotel and accommodation development and attractions should be the mandate of the Enterprise Services department and Economic Development. Where a possible investment is being pursued which would have direct benefit to the tourism sector, Tourism Services could act as an advisor and provide supportive information.

6.4 Tourism Branding, Marketing & Product Development Including Performance Measurement & Coordination with Other Tourism Organizations

6.4.1 Guelph's Tourism Brand & Pursuit of the Leisure Market

Based on the *Open for Business: Marketing, Communications & Branding Strategy* a new brand, "Visit Guelph" was developed, complementary to the "Invest Guelph" branding by the Economic Development Department as a whole. The branding research and development was carried out with very limited involvement of tourism industry partners. This was a missed opportunity to increase engagement with partners through a process of consultation and feedback, gain benefit from their ideas and build support for cooperative promotional efforts to advertise the new brand. The brand "Visit Guelph" had the benefit of bringing greater consistency to print and digital communications. However, the branding exercise created a logo but did not develop a set of messages targeted at specific tourism goals and markets, which could have been an ongoing guide to the development of marketing collaterals, e.g. visitor guides, or new product development. The "Visit Guelph" brand itself is satisfactory but not particularly inspiring. It does not create any visual image of the City, which is unfortunate given that the City's name and identity are not reinforced by proximity to any prominent, natural or man-made feature or historic fact, e.g. Niagara Falls, Wasaga Beach, Kingston Penitentiary. Nor does it have a compelling tag line, e.g. London Ontario – Can't Wait to See You; Austin Texas – Live Music Capital of the World; Portland is Happening Now, and Find What You Love in Boston.

Recommendation #14: Guelph Tourism Services should explore further development of its Visit Guelph brand and develop strategic goals and messages and a tagline to enhance its visibility as a tourism destination in the eyes of the travelling public.

6.4.2 Guelph Lacks Major Tourism Generators Which Impacts Brand Recognition & Its Success in the Leisure Market

Guelph Tourism Services and the City's tourism sector have a major challenge in that the City lacks major tourism generators. The City, while picturesque with an attractive downtown core and heritage area, including a cathedral, many parks and natural areas, does not have major natural features which can act as attractions to visitors. Guelph is not located on a lake or mountain offering 4-season recreational opportunities and visual identification, e.g. Collingwood, Barrie, Wasaga Beach. Nor does it have an iconic man-made structure, e.g. Kingston Penitentiary, Windsor's Ambassador Bridge and Detroit skyline, Toronto's CN Tower, Ottawa's Parliament buildings, or tourism attraction or theme parks, e.g. Canada's Wonderland, African Lion Safari, Ste. Marie Among the Hurons. Also, Guelph is not a "gateway" to a major tourism generator or recreational opportunity in the way Huntsville is to Muskoka or Peterborough to the Trent-Severn Waterway.

Other Ontario cities in similar circumstances have sought to create tourism generation by establishing a major multi-week themed festival or signature event. Stratford, once just a railway junction and furniture manufacturing centre, has transformed itself with the Stratford Festival. Niagara on the Lake and Blyth have pursued similar strategies, as has Kitchener-Waterloo with its 9-day Oktoberfest event, and St. Jacob's with its Farmers Market. Other examples include:

- Austin Texas's South by South-West music festival which has grown into the largest music event for popular music and emerging singers, musicians and bands, drawing music producers, advertising agencies, digital content producers and the general public, as well as
- Branson Missouri's country western themed event and performing centres.

- Albany, New York's Tanglewood Music Festival in conjunction with the Boston Symphony, which offers classical music concerts through the summer and has become an educational centre for young musicians.
- Hay-on-Wye, Wales has established itself as a destination for book lovers by encouraging the establishment of over twenty second-hand and antiquarian bookshops and a series of festivals throughout the year.
- Glyndebourne, East Sussex, England has created a 4-month opera music festival which is now world-renown for its opera performances featuring international artists.

If Guelph is to develop a mature tourism sector and have sustainable success in the leisure market it will need to be creative in establishing one or more major tourism generators and build a brand and image related to them which raises the profile of the City in the mind of the travelling public. This will require a concentrated effort by the City and its industry partners beginning now and looking ahead 10 – 15 years. The following are examples of possible themed approaches to creating a unique tourism destination. The activities presented are illustrative purposes only. Guelph Tourism Services and its industry stakeholders should determine the theme and events to be pursued and developed.

Guelph has some unique strengths and attributes upon which tourism generators could be developed over time.

1. Alternative / Folk Music / Avant Garde Performing Arts Tourist Destination

The Hillside Music Festival and its Fab 5 partners offer a base from which to develop a more comprehensive and longer-term cultural tourism generator which could include:

- Multiple music and performing arts events
- Summer education program for musicians
- Antique furniture and vintage clothing flea market
- Classic/custom car rally and showcase

2. Agricultural / Food Themed Tourist Destination

Developed with the University of Guelph's Agricultural and food programs, OMAFRA's Head Office and many Ontario agriculture and food associations situated in the City. Guelph is already identified as a centre of the agriculture and food industry but has not taken advantage of it for tourism generation. Initiatives which could be pursued collectively to create a tourism draw could include:

- Expand taste•real to include "barn dinners" and food-to-table culinary events
- Establish the largest organic farmers market in Ontario
- Given that the University of Guelph has a Hospitality, Food and Tourism program, create an event where student chefs from other Ontario university and college programs can compete in a food cook-off with the prize being an internship with a major restaurant or hotel in the City
- Develop a food-related cable television program for the Food Network featuring Guelph chefs, restaurants and/or culinary events
- Create a competition for antique farm tractors and equipment and trucks
- Establish an incubator for the creation of new food products and have a retail centre for locally produced food products
- Beer festival with the support of Sleeman and other brewers

3. Green Ecological City of the Future

Guelph has made a major commitment to becoming a sustainable city through its Community Energy Initiative, its advanced waste treatment system and its planning practices to protect its natural areas and river systems. The City is promoting itself as a centre for innovation in green technology and has over 45 companies and associations in its environmental sector.

The City could develop a tourism generator themed on *Green Ecological City of the Future* by such activities as:

- host energy conservation and innovation in green technology symposiums and conferences with provincial, national and international invitees. The *Quality of Urban Energy Systems of Tomorrow Symposium* held in Guelph is an example of one such initiative
- host an *Environmental Home of the Future Showcase* event to which Guelph and other Ontario companies could demonstrate the latest products which homeowners, home renovators and new home buildings could use to conserve energy and reduce waste
- host an *Organic Landscaping & Gardening Event* which would demonstrate techniques for organic gardening without the use of pesticides and with water conservation
- establish an event similar to *Dragon's Den* where entrepreneurs and investors in new green technology companies could network, and broadcast the event online

Recommendation #15: Guelph Tourism Services, working with the Tourism Industry Stakeholder Advisory Committee should begin an exploratory planning process to develop a themed approach to establishing Guelph as a tourism destination over time through the creation of one or more major tourism generators. These tourism generators could evolve from one of the following themes:

- Alternative / Folk / Jazz Music / Avant Garde Performing Arts Tourist Destination
- Agricultural / Food Themed Tourist Destination Centre
- Green Ecological City of the Future

Recommendation #16: Guelph Tourism Services should continue to pursue the leisure market with available resources, particularly visitors from the Greater Toronto Area and central Ontario region as part of an overall strategy to create one or more tourism generators, building on its current assets and events.

6.4.3 Visiting Friends & Relatives & Corporate Business Travel Markets Need to be Given Greater Priority in Marketing & Product Development

Guelph is primarily a visiting friends and relatives (VFR) and corporate business travel destination, but the focus of Tourism Services marketing, promotion and product development has been primarily on the leisure market, seeking to bring visitors from the GTA and elsewhere to Guelph. While the department has been successful working with others in developing *taste•real*, a culinary experience working with the County and others, and branding the Fab 5 events of the Hillside Festival, Eden Mills Writers Festival, the Guelph Jazz Festival, the Festival of Moving Media and the Guelph Contemporary Dance Festival, it has not give sufficient attention and resources to the VFR and corporate business markets. Guelph, with the presence of its university, the Ontario Ministry of Agriculture & Food's head office, the head offices of many agriculture and food-related associations, and a diversified industrial base with significant corporate head offices and operations, e.g. Sleemans, Cargill, Canadian Solar Solutions, Linamar Corporation, Polycon Industries, brings many business and academic people to the City. Further, with its large student population, the family and friends of these students are attending events on campus throughout the year. Further, Guelph is a hotel hub for the broader region and will have VFR and business people staying in the City who came for purposes outside the City proper. Both the VFR and corporate markets should be receiving more attention in the delivery of tourism services in the future.

In general, there has been little product development involving the packaging of accommodation, restaurant and events within the City. *Taste•real* has been a successful tourism product and, more recently, Tourism Services has been working with the University of Guelph to develop a package of experiences to support the University's 50th anniversary. The University of Guelph hosts conferences and events scheduled throughout the year. In 2014 up to October 18 there are 19 conferences or other meetings which have an expected 300 or more attendees. The Annual Organic Agriculture Conference has an expected attendance of 3,000. (See Appendix 4). Marketing and product development to encourage multi-day visits by these attendees (and their family members) is needed. Greater

attention needs to be given to developing tourism event, accommodation and hospitality packages in coordination with industry stakeholders to attract visitors, to encourage them to stay longer (over-night stays), and to bring their friends and families with them.

Recommendation #17: Guelph Tourism Services should give priority to and focus more of its marketing and product development resources on the visiting friends and relatives and corporate markets, working with the University of Guelph, hotels and local industry, including:

- consult with the University of Guelph in advance with respect to upcoming events for students and alumni and conferences and symposiums involving participants from outside the City, and develop visitor information kits and tourist packages with the participation of hotels, restaurants and retailers
- develop spousal programs featuring Guelph's attractions, current events and retail areas for those accompanying conference attendees
- develop a "Guelph Welcomes You" program for students and families coming to the University:
 - in the spring and fall to complement the University's "open houses" providing information on its curricula, programs and facilities
 - in the fall for Frosh Week and Alumni homecoming events and Fall Preview Day when the new student year begins
- develop a visitor information kit which Guelph-based companies could make available to their corporate visitors
- work with Guelph hotels to make visitor information available to their corporate guests by posting "What's Happening in Guelph Today?" information in their lobbies and in-room entertainment systems
- provide hotel concierges and desk staff with information on current and upcoming events which could be shared with corporate guests and others such that each hotel, B&B and other accommodation providers become "mini tourist information centres"
- provide Guelph information packages to libraries and city recreation facilities to turn these into mini tourist information centres; consider tourism information training for front line staff in these facilities
- encourage Guelph-based agriculture and food associations to hold their annual meetings and other events in the City and provide participants with visitor information packages and spousal programs

6.4.4 Sports Tourism Has Potential but City a Late Entrant

The University participates in a number of national and provincial sporting activities and sees the potential of attracting additional visitors through a focus on sports tourism. While this has been a matter of discussion between the University and Guelph Tourism Services, it is only recently that the department has joined a regional sports tourism marketing and promotion effort which has been launched by the CEO of RTO 4. The potential of sports tourism has been demonstrated in the City recently with the hosting of Hamilton Tiger Cats games. London, Brantford and Kingston have all targeted the sports tourism market and London, in particular, has been successful in bringing provincial and national tournaments to the City, e.g. 2013 World Figure Skating Championships, which brought an estimated \$17.2m to the London economy, as well as significant employment benefits, as described in the following:

2013 ISU World Figure Skating Championship - Economic Impact Assessment

"The spending of spectators, participants, members of the media and the event organizers in hosting the event made as part of the 2013 World Figure Skating Championships totalled \$20.7 million, generating an estimated net economic activity (GDP) of \$23.2 million in the Province of Ontario, of which \$17.2 million occurred in London. These expenditures supported \$12.6 million in wages and salaries in the Province and an estimated

261 jobs, of which 213 jobs and \$9.6 million in wages and salaries was in (industry output) generated by the event was \$42.6 million in the Province, with \$32.1 million occurring in London.

The total tax revenues supported by the 2013 World Figure Skating Championships reached \$8.1 million. Of this total, \$3.7 million was attributable to the federal government while provincial tax revenues reached \$2.9 million and municipal taxes were \$1.5 million, of which \$1.2 million was in London.“

Source: Canadian Sport Tourism Alliance, May 2013

http://canadiansporttourism.com/sites/default/files/docs/2013_isu_wfs_london_-_ei_assessment_-_final.pdf

Recommendation #18: Guelph Tourism Services should give greater priority to pursuing the sports tourism market, including provincial, national and international sporting events, tournaments and competitions, building on its strengths as a hotel hub in coordination with the University of Guelph and RTO 4's regional effort involving Waterloo Regional Tourism Marketing Corporation. The City should provide additional resources to Guelph Tourism Services to support the bid process to bring national and provincial sports tournaments to the City. (See also Recommendation #3).

6.4.5 Guelph Tourism Services Working Well with County, RTO 4 & Others

Guelph Tourism Services is working well with the County Economic Development Office with respect to the marketing and promotion of regional events and attractions which can bring visitors to stay in Guelph hotels, e.g. Eden Mills Writers Festival, Elora Gorge, taste•real. Tourism Services is also working well with RTO 4 on regional tourism marketing and promotion and is promoting the use of a room registration system which has been established by RTO 4.

Recommendation #19: Guelph Tourism Services should continue to work regionally in a collaborative fashion with Wellington County, RTO 4 and other tourism organizations and attractions, building on its strength as a regional hotel hub and leveraging its resources by joint regional marketing and product development. Guelph Tourism Services should continue to work with Wellington County to support the taste•real culinary tourism product. The RTO 4 collaborative initiative to develop sports tourism should be supported and Guelph Tourism Services should be an active promoter of RTO 4's hotel reservation system.

6.4.6 Need for Performance, ROI Measurement

There is a lack of visitor tracking and performance measures in place to evaluate the success of market campaigns and products. The hotel registration system offers the potential of providing performance-related information if it becomes fully established and used by Guelph Tourism Services, other municipal tourism services providers in the Region, and by event organizers. Other data will need to be gathered through visitor surveys, and discount coupon programs associated with event advertising and package products. It should be noted in this regard that Guelph Tourism Services' efforts are only one contributor to a positive or negative change in these performance measures. Hotel customer service, event organization or lack thereof, an improvement or downturn in the overall Ontario economy, even bad weather, could affect performance results.

The following are examples of performance measures which could be used to provide information on the success of marketing and product promotion:

Visitors:

- number of visitors relative to historical trends
- number and duration of overnight stays reported
- hotel and B&B occupancy rates
- hotel and B&B revPAR
- attendance and revenues at major festivals and events

- participation in spousal / partner programs
- attendance and revenues from visitors to the City's museum and other facilities
- online booking sales through hotel registration system
- number of tour buses and passengers
- number of sport tourism bids and success rates

Website & Social Media:

- total visits
- unique visitors
- average time on website
- page views

Mobile App:

- number of downloads

Social Media:

- new likes on Facebook
- number of tweets and followers on Twitter

Guelph Tourism Services could also prepare or commission economic impact studies related to specific events to demonstrate the benefits to the City using Ontario Ministry of Tourism, Culture & Sports Tourism Regional Economic Impact Model (TRIEM) – www.mtc.gov.on.ca/en/research/triem/triem.shtml.

Recommendation #20: Guelph Tourism Services should develop a performance measurement system and performance measures to support its tourism marketing and event promotion activities. The performance measurement system should include reporting on performance measures and economic impact analyses of promoted events. This performance measurement system will need the cooperation of the hotel and hospitality industry and event organizers to provide visitor attendance, occupancy and expenditure data. The RTO 4 hotel / accommodation registration can also provide data in these regards.

6.5 Communications, Including Visitor Services, Website & Social Media

6.5.1 City Hall Tourist Information Centre Ineffective

Tourism Services operates an information centre on the main floor of City Hall. This centre is ineffective and lacks visibility with the travelling public. This centre is only open 9:00 to 4:30 Monday through Friday and only recently has opened from 10:00 to 3:00 on Saturdays. The information centre is adjacent to Service Guelph, which provides other municipal services to the public. There is lack of coordination and communication with Service Guelph both in terms of communications and referrals amongst staff on the main floor, and also with respect to other services. Guelph Business Services books sports competitions on many of the City's sports fields and recreation areas. While it provides this information to Tourism Services, it has been reported that there is very little follow-up or attempt to use this information for marketing and promotional purposes to attract visitors to the events by Tourism Services.

The ineffectiveness of the City Hall tourism information centre was identified by many stakeholders in interviews and in the online survey, and is a source of dissatisfaction. As can be seen from Chart XII, the average number of contacts per day in 2013 was 12, which included in-person, by phone and online contacts. A majority of those who contacted the centre were local residents (75%-85%). The majority of the contacts were in person with the rest being by telephone or digital media. The centre is not primarily providing information to visitors except indirectly. Residents may be obtaining the information for visiting friends and relatives. However, given the proximity of the tourism

information services centre to Service Guelph, it may be that some of these visits are serendipitous because of the proximity, e.g. curiosity / casual interest.

Cost vs. service demands suggests that a different model of information services provision should be considered.

Chart XII: City Hall Visitor Information Services Centre Statistics

Mode of Communication %							
2013	# of People Contacts/Month	Avg # Visitors/Day	In Person	On Phone	Online	Resident %	Visitor %
Jan	232	11	85.5%	9.0%	4.5%	86.5%	14.4%
Feb	190	9	85.9%	9.4%	4.7%	86.5%	13.5%
March	216	10	82.0%	12.7%	5.3%	81.6%	18.4%
April	229	10	79.7%	10.4%	10.0%	81.0%	19.0%
May	315	14	90.1%	8.0%	1.9%	81.5%	18.5%
June	289	13	94.1%	5.2%	0.7%	86.2%	13.8%
July	371	17	94.9%	3.8%	1.3%	80.8%	19.2%
Aug	442	20	94.3%	4.6%	1.1%	72.6%	27.4%
Sept	227	10	88.7%	5.5%	5.9%	72.8%	27.2%
Oct	168	8	90.5%	8.9%	0.6%	73.5%	26.5%
Nov	119	5	86.6%	11.8%	1.7%	75.4%	24.6%
Dec	135	9	95.6%	3.0%	1.5%	87.4%	12.6%
TOTAL # of Contacts 2013	2933						
Average/day annually	12	12					

It is clear from the chart and as recognized by industry stakeholders that the location of the tourism information centre at City Hall is ineffective and a new approach to providing information to visitors is needed. There are a wide range of possible approaches which could be taken in the provision of tourism information to visitors. These could include relocation of the information centre, combining tourism information services with the services provided by Service Guelph; contracting tourism information centres out to other providers, e.g. chamber of commerce, downtown business association, private firm; expanding the provision of information through digital media; replacing in-person service with the provision of information online and / or through digital kiosks throughout the City, or other approach.

Recommendation #21: The City of Guelph and its Tourism Services should develop a series of options for a new approach to the delivery of tourism information services to replace the current approach

involving the Tourist Information Centre located at City Hall, and evaluate these options against the following criteria:

- information service should be available during the day, at night and on weekends
- information service should be accurate and updated daily
- information service should be available to visitors where it is most accessible to them
- information service must be cost-effective
- an opportunity for feedback from visitors relative to their experience should be provided

6.5.2 Digital Media: the Future of City Tourism Information-Sharing with the Public

Guelph Tourism Services has established a website which has been updated with the new Visit Guelph brand and imaging. The website provides information on:

- Meetings, Conferences & Events:
 - events calendar, assistance with planning meetings and conferences, accommodation, technology and catering requirements, assistance with selecting a venue for sporting events
- Accommodations – hotels, B&Bs, retreats, camping
- Dining - bistros & cafes, casual dining, ethnic favourites, fine dining, pubs
- Activities - night life, family fun, outdoor & sport, relaxation, culture
- Shopping – antiques, breweries & wineries, fashion, markets, shopping centre, specialty shopping, sports & golf
- Services – catering, education, information centres, moving services, real estate, technology, transportation, travel services
- Packages – current Packages listed include: Welcome Back Package for UofG's 50th Anniversary, includes a \$50 Downtown Guelph Dining Certificate; Fearless at the 50th Package, includes a Downtown Guelph Dining Certificate; Guelph Gastronomy Package, includes local food gift basket and a \$50 Downtown Guelph Dining Certificate

However, the Guelph Tourism website is less sophisticated in the way it presents information as some of its competitors, e.g. London's websites targeted at specific markets; Barrie's multiple websites in different languages targeting the multi-cultural population of the GTA. London and Brantford have particularly effective information for meeting planners and sports organizers, with sets of web pages and hot links to assist meeting planners and sports organizers to understand the facilities available in the community. London provides a specific set of tools which event planners can use to request a proposal from Tourism London for the hosting of their event. Brantford has a media kit and a City tourism profile on line which can be copied and used by travel writers to promote the City.

Guelph Tourism Services is making effective use of social media, e.g. Facebook and Twitter and has developed a video showing some of Guelph's features and attractions to the travelling public. Use of websites and social media is a very cost-effective way of providing tourism-related information and should receive continued support going forward. Further, the content which is developed for the website(s) could be made available to others, e.g. hotels for use in their in-room entertainment systems, kiosks located around the City.

Recommendation #22: Guelph Tourism Services should continue to develop its online website and use of social media. It should develop its website to include additional features, information and tools targeted at different audiences, including meeting planners, sports organizations, media / travel writers, companion visitors, FAM trips, convention suppliers, convention services including information booths at conventions, and, as much as possible, improve the online visit experience through increased inter-activity and the use of photos, videos and graphics. It should continue its support for Facebook and Twitter in a compatible way with providing tourist information with a new approach through its tourism information centre.

Recommendation #23: Guelph Tourism Services should develop a process for timely updating of information regarding current and forthcoming events with the support of its partners and the guidance of the Tourism Industry Stakeholder Advisory Committee.

Recommendation #24: Guelph Tourism Services should consider the development of a “native app” to complement its current app for smart phones, iPads and other tablets which could provide information to a visitor which they can access while travelling around the City. This native app could provide locational and other information on Guelph attraction, restaurants, hotels and other places of interest which is keyed to the GPS locator in the visitor’s smart phone or other digital device.

Recommendation #25: Guelph Tourism Services should actively monitor online usage statistics to improve the website architecture and content and its overall tourism services.

Recommendation #26: Guelph Tourism Services should explore with the City’s hotels the potential to include a daily “What’s Happening in Guelph” webcast which could be distributed through the hotels lobby information and in-room entertainment systems to showcase Guelph and current events which would be of interest to visitors.

6.6 City & Region Infrastructure Improvements Would Benefit Tourism

6.6.1 Way-finding Signage

A significant impediment for tourists seeking and finding information on the location of various City attractions and institutions is a lack of way-finding signage. This was identified in the *Open for Business. Marketing Communications & Branding Strategy* (2012) and was mentioned by stakeholders in the online survey. Given that the City has made significant investment in the City Hall and surround area and has made a commitment to downtown renewal, it would be helpful if way-finding signage was included in the plans for further development of the downtown and other areas of the City. This signage can help to reinforce the Visit Guelph brand and imaging.

Recommendation #27: The City of Guelph, with the input of Tourism Services and its Transportation department should develop a way-finding signage plan for the City which would provide visitors as well as residents with directional information to the City’s facilities, attractions, parks and unique areas of interest.

6.6.2 GO Transit

The redevelopment of the Guelph VIA station and the recent scheduling of GO trains between Guelph and downtown Toronto has been of significant benefit to the City. However, the current GO Train schedules are focused on commuters from Guelph who are going to Burlington, Oakville and downtown Toronto for work and returning in the evening. A schedule which would include opportunities for visitors to come to Guelph in the morning and leave in the evening and where the schedule could be expanded to include not only travel during the week but on weekends would be of benefit not only to business visitors but to non-business leisure visitors as well, e.g. individuals and families.

Recommendation #28: The City of Guelph, with the support of Guelph Tourism Services, should encourage GO Transit to expand its schedule and increase access by visitors from Toronto and the GTA to Guelph weekdays and on weekends to complement the recently expanded service for commuters from Guelph to Toronto.

6.6.3 Upgrades to City Facilities

Guelph is competing for tourism with other municipalities in the southwestern Ontario market. Some of these cities have made investments in new facilities, e.g. performing arts centres and arenas, which are benefitting tourism attraction in their cities. London’s Budweiser Gardens, Kingston’s K-Rock Centre, Brantford’s Gretzky Centre, Kitchener-Waterloo’s Conrad Centre, Chatham-Kent’s new convention centre, as reported to us by Guelph facility managers and others, have more up-to-date electronic and technical capabilities to support and broadcast concerts,

sporting and other events. Also, Guelph would benefit if further investment was made in recreational facilities which could be operated at lower costs to meet local needs rather than using existing major facilities, e.g. Sleeman Centre, to support local recreational needs at higher cost.

Recommendation #29: The City of Guelph should give consideration to upgrading existing City facilities, e.g. Sleeman Centre and River Run Centre to better meet the technical and broadcast requirements of concert promoters and sports organizations as the lack of such technical capacity is an impediment to these centres hosting events which would attract visitors from outside the City. In its planning the City should also evaluate the need for lower cost recreational facilities to meet local needs, freeing up time and space for larger events at its two major facilities.

7.0 Implementation Plan

Guelph Tourism Services should review this report and within three months develop a plan of action to implement the recommendations. The first overall priority should be to confirm Recommendation #1 Revitalized Tourism Services department with Industry Stakeholder Advisory Committee and Recommendation # 2 City of Guelph Commitment to Continue Municipal Funding Support. Once these recommendations have been confirmed the implementation plan should be developed to guide implementation of the remaining recommendations. This will require leadership from the General Manager, Culture and Tourism and Supervisor, Tourism Services and should be a collaborative process involving staff and the Tourism Services Industry Stakeholder Advisory Committee. The development of the implementation plan should be seen as an opportunity for team development and an opportunity for staff to bring forward their ideas for the future in an environment of optimism and certainty.

A key component of the implementation plan will be establishment of the new Tourism Services Industry Stakeholder Advisory Committee. Terms of reference for the Committee will need to be developed and a process for inviting stakeholders to participate established. Once Committee members have been selected, they can become involved in the implementation plan development process. Tourism Services management and staff will need to develop opportunities for the Committee to meeting and contribute to the planning process.

With the support of the Committee, Tourism Services should organize a one-day workshop to which all tourism partners are invited in order that they can be consulted with respect to the department's plans going forward.

An action plan should be developed for each Recommendation. In some cases, an action plan can be developed which addresses more than one Recommendation. Each action plan should describe the objective being pursued, the process and activities involved, the roles and responsibilities of key management, staff and others, the timeframe and expected result or "deliverable".

To guide Tourism Services management and staff in the development of the implementation plan the following chart provides an overview of the recommendations and the priorities and timeframe which could be followed. This chart should be seen as a guide to discussion, management and staff should feel free to change the suggested priorities and timeframes in the eventual final implementation plan based on their own deliberations and the input they receive from the Tourism Services Industry Stakeholder Advisory Committee and others.

Once completed the Implementation Plan should be presented to the Executive Director, Community and Social Services for approval and any further approvals which may be required.

Tourism Services should prepare an annual report which describes progress on the implementation plan, achievements during the year and include a report on performance once the performance measurement system has been put in place. The annual report can be included as part of the department's budget submission in the annual city budgeting process.

Appendix 1: Economic Impact of Tourism Sector on Guelph & Wellington County

X.i Summary of the Economic Impact of Tourism in Guelph / Wellington County

Guelph's Tourism Services have contributed to the economic impact of the tourism sector in Guelph and Wellington County. The following describes the economic impact that the tourism sector has had on Wellington County based on the TREIM economic impact model which has been developed and promoted by the Ontario Ministry of Tourism. In 2012 data was available from Tourism Guelph that stated there were 2.2 million visitors to Wellington County in 2009, who spent \$155 million in the County in that year¹. This Appendix updates this figure to 2011 (based upon the most recent data available) and then calculates the economic impact of this expenditure upon the County and province.

Methodology to Update Tourism Figures

- Most recent tourist data available for the RTOs is for 2011
- However because of methodological changes in the way Stats Canada conducts the Canadian Travel Survey, 2011 data is not directly comparable to previous years
- But, the Ontario Ministry of Tourism, Culture and Sport (MCTS) has developed a methodology to adjust tourism data in previous years to the new 2011 base figures – this data is available at the provincial level, not at the level of RTOs or smaller units of geography
- So, applying the index of growth in provincial tourism expenditure to the expenditure figure for Wellington County would provide reasonable proxy for expenditure growth overall (growth in expenditure, rather than tourist visits, is the most appropriate measure as it captures both changes in tourist visits and well as changes in expenditure patterns)
- The changes in expenditure patterns over this period for the province as calculated by MTCS is shown below:

Year	Total Tourist Expenditure in Ontario (\$ millions)	Change from Previous Year
2009	\$18,765.9	-
2010	\$19,898.6	6.04%
2011	\$20,802.5	4.54%
Change from 2009 - 2011		10.85%

- As mentioned, the 2009 data is available from Tourism Guelph shows that 2.2 million visitors to Wellington County in 2009 spent \$155 million in that year
- Updating this expenditure figure to 2011 using the methodology above would imply an expenditure estimate for 2011 of **\$171.8 million** (i.e. the previous expenditure figure of \$155 million increase by the index calculated above – i.e. 10.85%)
- So estimate of tourism expenditure in Wellington in 2011 is **\$171.8 million**

Economic Impact (using TREIM – Economic Impact Model)

\$171.8 million in visitor expenditure in Wellington County in 2011 is associated with:

	In Wellington County	In Rest of Ontario	Total in Ontario
Direct Expenditure	\$171,800,000	\$0	\$171,800,000
Gross Domestic Product (GDP)	\$108,717,053	\$41,274,494	\$153,297,298
Jobs	2,023	553	2,576
Wages and Salaries	\$67,925,135	\$27,458,014	\$95,383,149
Direct Taxes	\$54,039,934	\$14,709,987	\$68,749,921

Interpretation

- These results show that tourism activity is a major economic activity in Wellington County

¹ Source: *Tourism Services Presentation to CSS Management Group*, June 21, 2012.

- However these benefits cannot necessarily be attributed to the result of destination marketing activities: as with any other area, much of this tourist activity would have happened anyway (people coming to visit friends and family, business meetings, etc.)
- as well, Guelph Tourism is not the only destination marketing organization operating in the County: we also have Centre Wellington actively promoting Fergus and Elora , and the RTO, etc.

X.ii The Economic Impact of Wellington County Tourist Spending Economic Impact in Wellington County in 2010

This report was generated by the Ontario Ministry of Tourism, Culture & Sports’ TREIM model.

Note: The Ministry of Tourism, Culture & Sports does not take any responsibility for inputs that the user has provided, nor for the interpretation of the results.

1. Introduction

This report provides an estimate of the economic impact that Wellington County Tourist Spending Economic Impact is expected to have on Ontario’s economy, in terms of Gross Domestic Product, employment and taxes generated. The analysis is based on the following information the user has provided to the MTC’s Tourism Regional Economic Impact Model:

Total Spending of \$171,800,000 by origin visitors for Activity (or Event) of Type Any Entertainment

Given that the detailed breakdown of the spending on category, such as transportation, accommodation, etc. is not available from the user, the TREIM utilized the average expenditure of visitors in Wellington County with characteristics closest to those provided by the user from Statistics Canada’s 2009 Travel Survey of Residents of Canada and the International Travel Survey to generate the detailed spending as follows (in dollars):

Visitors’ Origin	Spending %
Ontario	80.00%
Rest of Canada	12.00%
USA	6.00%
Overseas	2.00%
Total	100.00%
Travel Services	\$0
Public Transportation	\$8,562,806
Private Transportation - Rental	\$2,155,335
Private Transportation - Operation	\$29,742,221
Local Transportation	\$973,221
Accommodation	\$29,654,957
Food & Beverage - At Stores	\$13,863,338
Food & Beverage - At Restaurants/Bars	\$41,770,567
Recreation & Entertainment	\$27,415,719
Retail - Clothing	\$11,774,086
Retail - Other	\$5,887,749
Total	\$171,800,000

The user also has selected the following parameters:

- The visits take place in Wellington County in 2011
- The impact is to be shown for Wellington County and for Rest of Ontario
- Induced impacts of household spending are included
- Induced impacts of business investment are included
- The economic environment is as follows:

Baseline	2006	2007	2008	2009	2010
Ontario Real GDP (%change)	2.44%	1.95%	-0.86%	-3.63%	3.20%
Ontario CPI (%change)	1.76%	1.83%	2.27%	0.37%	2.43%
Ontario Population (%change)	1.09%	1.00%	1.08%	1.02%	1.11%
Ontario Unemployment Rate	6.27%	6.38%	6.53%	9.04%	8.72%
Government of Canada 3 month T- Bill Rate	4.03%	4.15%	2.39%	0.35%	0.60%

2. Summary of Findings

Table 1. Economic Impacts of Wellington County Tourist Spending Economic Impact in Wellington County in 2010 (in dollars)

	Wellington County	Rest of Ontario
Total Visitors' Spending	\$ 171,800,000	-
Gross Domestic Product (GDP)		
Direct	\$72,847,371	\$0
Indirect	\$19,493,640	\$25,943,670
Induced	\$16,376,042	\$15,330,824
Total	\$108,717,053	\$41,274,494
Labour Income		
Direct	\$45,211,668	\$0
Indirect	\$12,938,580	\$17,499,570
Induced	\$9,774,887	\$9,958,444
Total	\$67,925,135	\$27,458,014
Employment (Jobs)		
Direct	1,590	0
Indirect	253	355
Induced	180	198
Total	2,023	553
Direct Taxes		
Federal	\$17,305,293	\$0
Provincial	\$18,810,501	\$0
Municipal	\$106,334	\$0
Total	\$36,222,129	\$0
Total Taxes		
Federal	\$28,619,099	\$7,685,837
Provincial	\$25,121,446	\$6,903,288
Municipal	\$299,389	\$120,860
Total	\$54,039,934	\$14,709,987

Table 2. Economic Impacts of Wellington County Tourist Spending Economic Impact in Wellington County on GDP by industry (in dollars)

Industry	Impact on Wellington County		Impact on Rest of Ontario	
	Direct GDP	Total GDP	Direct GDP	Total GDP
Crop and Animal Production	\$0	\$445,228	\$0	\$552,670
Forestry, Fishing and Hunting	\$0	\$47,335	\$0	\$112,762
Mining and Oil and Gas Extraction	\$0	\$54,035	\$0	\$221,582
Utilities	\$0	\$980,434	\$0	\$812,475
Construction	\$0	\$2,698,349	\$0	\$1,083,102
Manufacturing	\$0	\$2,599,462	\$0	\$8,292,025
Wholesale Trade	\$0	\$3,372,247	\$0	\$3,772,149
Retail Trade	\$6,227,477	\$9,203,064	\$0	\$2,345,273
Other Transportation and Warehousing	\$5,072,767	\$6,444,788	\$0	\$2,846,905
Ground Passenger Transportation (excl. Rail)	\$984,916	\$1,152,726	\$0	\$204,722
Information and Cultural Industries	\$553,438	\$2,191,754	\$0	\$2,378,851
Other Finance, Insurance, Real Estate and Renting and Leasing	\$0	\$6,804,437	\$0	\$6,337,076
Car Renting and Leasing	\$1,183,906	\$1,297,194	\$0	\$202,955
Owner Occupied Housing	\$0	\$3,100,896	\$0	\$963,750
Professional, Scientific and Technical Services	\$0	\$2,443,226	\$0	\$3,219,964
Other Administrative and Other Support Services	\$0	\$1,290,785	\$0	\$1,495,047
Travel Agencies	\$0	\$0	\$0	\$0
Education Services	\$0	\$141,812	\$0	\$61,870
Health Care and Social Assistance	\$0	\$697,496	\$0	\$478,868
Arts, Entertainment and Recreation	\$10,413,938	\$10,857,688	\$0	\$618,943
Accommodation Services	\$20,598,102	\$20,728,410	\$0	\$941,097
Food & Beverage Services	\$12,191,792	\$12,700,701	\$0	\$1,732,183
Other Services (Except Public Administration)	\$62,157	\$1,033,468	\$0	\$858,482
Operating, Office, Cafeteria, and Laboratory Supplies	\$0	\$0	\$0	\$0
Travel & Entertainment, Advertising & Promotion	\$0	\$0	\$0	\$0
Transportation Margins	\$0	\$0	\$0	\$0
Non-Profit Institutions Serving Households	\$774,556	\$1,569,210	\$0	\$365,779
Government Sector	\$916,661	\$1,820,345	\$0	\$817,815
Net Indirect Taxes on Production	\$0	\$134,746	\$0	\$52,505
Total	\$72,847,371	\$108,717,053	\$0	\$41,274,494

The Economic Impact of Visits in Wellington County and other Ontario regions: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in Wellington County will spill over to other Ontario regions, such as the one you have selected as "additional". If the second column of Table 1 contains only zeros, then that means that Wellington County does not trade with that region.

Gross Domestic Product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers

to the GDP generated in those businesses that directly produce or provide goods and services for travelers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travelers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Direct impact on GDP, employment and tax revenues is also called tourism GDP, tourism employment and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors directly produce or provide goods and services to travelers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travelers directly and indirectly.

Employment: refers to number of jobs, include full-time, part-time, seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

Appendix 2: List of Stakeholder Interviewees

Marty Williams	Executive Director, Downtown Guelph Business Association
Jana Reichert	Economic Development Officer, County of Wellington
Marie Zimmerman	Executive Director, Hillside Festival
Catrina von Radecki	Co-Artistic Director, Guelph Dance Festival
Alan Boivin	General Manager, Delta Hotel and Conference Centre
Janet Perry	Owner / Operator, Norfolk Guest House
Tom Kendall	Director of Athletics, University of Guelph
David Peacock	CEO, Regional Tourism Organization 4
Susan Bennett	University of Guelph
Minto Schneider	Waterloo Regional Tourism Marketing Corporation
Paul Samson	Ontario Ministry of Tourism
Lloyd Longfield	Chamber of Commerce

Appendix 3: Guelph City Council Approved Comparable Municipalities



December 22, 2009

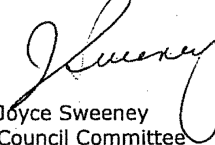
Mrs. L.A. Giles
Director of Information Services/
City Clerk

Dear Mrs. Giles:

At a meeting of Guelph City Council held December 21, 2009,
the following resolution was adopted:

"THAT when producing comparative statistics, only
municipalities from the attached Schedule "2" be used; and
that when only selected municipalities from this list are to be
used, a full explanation be provided as to why others have
been excluded."

Yours truly,



Joyce Sweeney
Council Committee
Coordinator

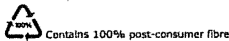
cc. Senior Management Team

JS:db

City Hall
1 Carden St
Guelph, ON
Canada
N1H 3A1

T 519-822-1260
TTY 519-826-9771

guelph.ca



Schedule "2"

Niagara Falls
Wellington County
Pickering
Ajax
Brantford
Waterloo
Chatham-Kent
Thunder Bay
Whitby
Guelph
Kingston
Cambridge
Barrie
St. Catharines
Oshawa
Greater Sudbury
Richmond Hill
Burlington
Oakville
Kitchener
Windsor
Vaughan
Markham
London
Brampton
Halton Region
Waterloo Region
Hamilton
Mississauga
Ottawa
Peel Region

Appendix 4: List of University of Guelph Conferences, Symposiums & Other Events, 2014

2014 Conference Listing

Updated
February 21, 2014

	Proposed 2014 Dates	Confirmed by client	Status	Svc Type	Conference/Group Name	Customer Estimate on Campus	Customer Estimate in Residence	Customer Estimated Bednights (Actual #'s from 2013)	Manager	Housing Location
1	Jan. 11	Yes	Aff	Basic	HHNS Symposium	175	0	0	Elyse	
2	Jan. 18	Yes	Aff	Basic	Farmsmart	300	0	0	Marg	N/A
3	Jan. 24		Ext	Basic	Mitacs	24	0	0	Marg	N/A
4	Jan. 24-27	Yes/NEW	Aff	Basic	JDCC (Je de Commerce Competition)	750	Hotels Only		Elyse	N/A
5	Jan.30-Feb.2	Yes	Acc	Basic	Annual Organic Agriculture Conference	3000	0	0	Marg	N/A
6	Feb. 1		Aff	Basic	Environmental Science Symposium	250	0	0	Marg	N/A
7	Feb. 17	Yes			FAMILY DAY				N/A	
8	Feb. 17 - 21	Yes			READING WEEK				N/A	
9	21-Feb		Int	Basic	OAC Case Competition	200	0	0	Marg	
10	Feb 18 - 20	Yes	Int		Winter Convocation	N/A	0	0	Marg	
11	Feb. 19-20	Yes	Aff.	Basic	Ontario Turfgrass Symposium	300	0	0	Marg	
12	Mar. 1-2	Yes	Aff	Full	CCUFSA Winter Workshop	N/A	off-site	off-site	Elyse - Reg only	Off-site
13	March 25 - 27		Ext	Basic	OHE Wildlife Focal Point Work Shop	40	0	0	TBD	Hotels Only
14	Apr. 18	Yes			GOOD FRIDAY				N/A	
15	April 18-19	Yes	Ext	Basic	Red/Blak Football Weekend	300	0	0	TBD	
16	Apr. 18-20		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
17	April 19 - 20		Int	FULL	Equine Guelph		0	0	Elyse	N/A
18	Apr. 21	Yes			EASTER MONDAY				N/A	
19	Apr. 21	Yes			EXAMS CONCLUDE				N/A	
20	Apr. 22		Int	Basic	Internal Risk to Policy	300			Marg	
21	Apr. 23	Yes	Int	Basic	Interaction #1	500	0	0	Marg	N/A
22	Apr. 24	Yes	Int	Basic	Interaction #2	500	0	0	Marg	N/A

2014 Conference Listing

Updated
February 21, 2014

	Proposed 2014 Dates	Confirmed by client	Status	Svc Type	Conference/Group Name	Customer Estimate on Campus	Customer Estimate in Residence	Customer Estimated Bednights (Actual #'s from 2013)	Manager	Housing Location
23	Apr. 25		Aff	Basic	GWC 2				Marg	
24	25-Apr		Int	Basic	OAC Careers in Agriculture and Beyond					
25	Apr. 25	Yes	Int	Basic	WindENG	300	0	0	Elyse	R25
26	Apr. 25-27		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
27	Apr. 26th	Yes	N/A	N/A	ELECTRICAL SHUTDOWN	N/A	N/A	N/A	N/A	N/A
28	Apr. 27-May 2	Yes	Int	Basic	Ontario Recreation Managers	600	0	0	Marg	
29	28-Apr		Int	Basic	CBS Grad Student Symposium	100	0	0	Marg	
30	28-Apr		Ext	Basic	URISA Ontario	220	0	0	Marg	N/A
31	29-Apr		Int	Basic	OAC Environmental Science Fair					
32	Apr. 30	Yes	Int	Basic	TLI Conference	150	5	5	Marg	East
33	May 1-3		Aff	Basic	4H Ontario Dairy Business School	50	50	50	Elyse	East
34	May. 2		Aff	Full	RISE 2013	300	0	0	Elyse	N/A
35	May-02	Yes	Aff	Basic	Southern Ontario Behavioural Decision Research Conference (SOBDR)	150	0	0	Marg	N/A
36	May 2-4		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
37	May 4 - 7		Ext.	Basic	Ontario Good Roads	600	260	515	Elyse	Levack & East (lowerlow only)
38	May 4-7	Yes	Aff	Basic	Global Development 2014	150		50	Elyse	N/A
39	May 5 - 12		Ext	Basic	NLDC2014 (AIESEC)	400	300	2400	Marg	Levack Addington
40	May 6-8		Aff	Basic	OUPMA	30	0	0	TBD	Hotels Only
41	May. 8	Yes	Int	Basic	Science Olympics	400	0	0	Elyse	
42	May 8-11		Ext	Basic	Spring Elite Soccer	22	22	22	TBD	East
43	May 9 - 11		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
44	May 11 - 15		Ext	Basic	About Face	12	48		Marg	TBD
45	May. 12	Yes	Int	Basic	Spring Academic Open House	500	0	0	Marg	East
46	May. 13	Yes	Int	Basic	Spring Academic Open House	500	0	0	Marg	East
47	May. 14	Yes	Int	Basic	Spring Academic Open House	500	0	0	Marg	East
48	May. 15	Yes	Int	Basic	Spring Academic Open House	500	0	0	Marg	East
49	May 16-18		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
50	May. 19	Yes			Victoria Day				N/A	
51	May 19 - 24		Aff	?	ISBBB (13th International Symposium on Bioplastics, Biosecurity, and Bioeconomy)	100	0	0	TBD	Hotels Only
52	May 20 - 21		Int	Basic	Graduate Math & Stats Conference	60	0	0	TBD	N/A
53	May 21 -23		Int	Basic	Eagle	55	55	68	Elyse	Levack/Add
54	May 22 - 24	New	Aff	Accom	Women in French Conference	100	10	20	Elyse	East

2014 Conference Listing

Updated
February 21, 2014

	Proposed 2014 Dates	Confirmed by client	Status	Svc Type	Conference/Group Name	Customer Estimate on Campus	Customer Estimate in Residence	Customer Estimated Bednights (Actual #'s from 2013)	Manager	Housing Location
55	May 23 - 25		Est	Accom.	RTI Rider Training	30	0	0	Elyse	East
56	May 23 - 26	Yes	Est		IMPACT 2014 (Co-Operates Sustainability Conf)	300	170	340	Marg	L/A
57	May 24 - 25	Yes	Est	Basic	FABA	200	0	0	Marg	
58	May 26 - 28	Yes	Int.	Accom.	Accessibility Conference	150	0	0 (22)	Marg	East/ Townhouses
59	May 26 - 30		Acc	Accom.	Retail Floral Shop Practices 101	20	5	0	Elyse	East
60	May 26 - Aug 22		Est	Basic	Rainbow Programmes for Children	700		0	Marg	Townhouse 29 May 26 August 22 Townhall June 12 - August 22
61	May 30 - Jun 1		Est	Accom.	RTI Rider Training	30	0	0	Elyse	East
62	June 2-4		Aff	Accom	University Consortium	150	0	0	Elyse	
63	June 2 - 6		Acc	Accom.	Introduction to Floral Design	30	TBD	0	Elyse	East
64	June 4 - 7		Aff	Full	PanAmerican BioEnergy 2014	250		0	Marg	
65	June 4-7		Aff	Full	Tourism Education Futures Initiative	80	60	180	Elyse	
66	June 6 - 8		Est	Basic	Agile Coach Camp Canada	100	TBD	TBD	TBD	
67	June 6 - 8		Est	Accom.	RTI Rider Training	30	0	0	Elyse	East
68	June 9 - 13		Acc	Accom.	Flowers- Creative Intermediate Floral Design	20	0	0	Elyse	East
69	June 9-13		N/A	N/A	CONVOCAATION	0	0	0	Marg	N/A
70	June 11-13	Yes/NEW	Aff	FULL	5th American Conference on Human Vibration	70-100			Elyse	Best Western
71	13/June		Aff	Basic	SETAC	75	TBD	TBD	TBD	
72	June 13 - 14	Yes	Est	Basic	Guelph Public Health Baseball Tournament	TBD	TBD	TBD	Marg	East
73	June 13 - 15		Est	Accom.	RTI Rider Training	30	0	0	Elyse	East
74	June 15 - 20		Est	Basic	Karate Camp	140	130	650	Elyse	Mac (Some TBD), Lennox (Instructor), Johnton
75	June 16 - 20		Acc	Accom.	Flowers - Weddings	30	TBD	TBD	Elyse	East
76	June 16 - 20		Int	Basic	Canadian Quantum Information Summer School	100	60	60	Marg	LA - double rooms
77	June 16 - 18		Aff	Accom	ORF / Groundswell Innovations Conference	200	0	0	Elyse	
78	June 19 - 20	Yes	Int	Accom	Sexuality	100	5	10	Marg	East
79	June 20 - 22	Yes	Int	Accom.	Alumni Weekend	4,000	25	10	Marg	East
80	June 20 - 22		Est	Accom.	RTI Rider Training	30	0	0	Elyse	East
81	June 23 - 25		Acc	Accom.	Flowers - Creative Advanced Floral Design	20	TBD	TBD	Elyse	East

2014 Conference Listing

Updated
February 21, 2014

	Proposed 2014 Dates	Confirmed by client	Status	Svc Type	Conference/Group Name	Customer Estimate on Campus	Customer Estimate in Residence	Customer Estimated Bednights (Actual #'s from 2013)	Manager	Housing Location
82	Jun23 - July 25		Ext	Basic	Canada Linc	25	0	0	Marg	N/A
83	June 23 - 26	Yes	Aff	Accomm/Full	Aquitards III Groundwater	300	0	0	Elyse	N/A
84	June 23 - 27		Int	Basic	Canadian Quantum Information Summer School	100	60	60	Marg	LA - double rooms
85	July 24-26	Yes	Ext	Basic	4-H Sheep & Goat Sense	25	25	50	Elyse	East
86	Jun 27 - July 1		Aff	Full	CCUFSA National	N/A	off-site	off-site	Kathy- Reg	N/A
87	Jun. 27 - 29		Ext	Accom.	RTI Rider Training	30	0	0 (4 total for the month)	Elyse	East
88	Jun29 - July 5		Int.	Basic	Pre-Flight	20	20	135	Marg	Lennox/Add
89	July 4 - 6		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
90	July 6-11	New	Aff	Full	ISPL 2014 (International Symposium on Plant Lipids)	250	5 TBD		Elyse	Delta & East
91	July 7 - 11	Yes	Int	Basic	OASBO	50	0	0	Marg	
92	July 11 - 13		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
93	July 14 - 18	Yes	Int	Basic	OASBO	50	0	0	Marg	
94	July 16 - 18		Int	Basic	PAGES (Week 1)	35	35	40	Marg	Lennox/Add
95	July 16 - 18		Aff	Full	AIRG (Avian Immunology Research Group Meeting)	200	TBC	TBC	TBD	Hotels & TBD on campus
96	July 16 - 19		Ext	Basic	Careermania	30	30	95	Elyse	East
97	July 18 - 20		Ext	Accom.	RTI Rider Training	30	0	0	Elyse	East
98	July 21 - 25	Yes	Int	Basic	OASBO	50	0	0	Marg	
99	July 25 - 27		Ext	Accom	RTI Rider Training	30	0	0	Elyse	East
100	July 25 - 27		Ext	Basic	Church of Latterday Saints	300	300	600	Marg	East
101	Aug. 4				Civic Holiday				N/A	
102	Aug 1 - 3		Ext	Accom	RTI Rider Training	30	0	0	Elyse	East
103	August 8 - 10		Ext	Accom	RTI Rider Training	30	0	0	Elyse	East
104	Aug. 13 - 15		Int	Basic	PAGES (Week 2)	35	35	50	Marg	Lennox/Add
105	Aug 15 - 17		Ext	Accom	RTI Rider Training	30	0	0	Elyse	East
106	August 18 - 19		Ext	Basic	Wellington Catholic District High School	40	0	0	Marg	N/A
107	Sept. 1				Labour Day				N/A	
108	Sept. 23		Ext	Basic	VWR	300	0	0	Elyse	
109	Sept. 27 or Oct 4		Int	Basic	Scottish Studies	50			Elyse	n/a
110	Oct. 13				Thanksgiving Monday					
111	Oct. 18		Int	Basic	Fall Convocation				Marg	

	Proposed 2014 Dates	Confirmed by client	Status	Svc Type	Conference/Group Name	Customer Estimate on Campus	Customer Estimate in Residence	Customer Estimated Bednights (Actual #'s from 2013)	Manager	Housing Location
					TOTAL	21523	1710	3410		

Appendix 5: Bibliography

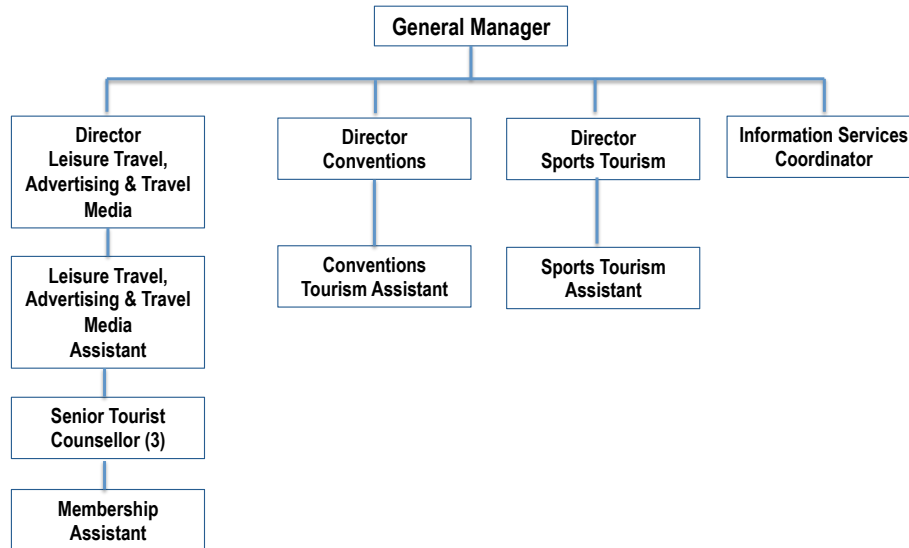
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Appendix 6: List of Municipal Benchmark Interviewees

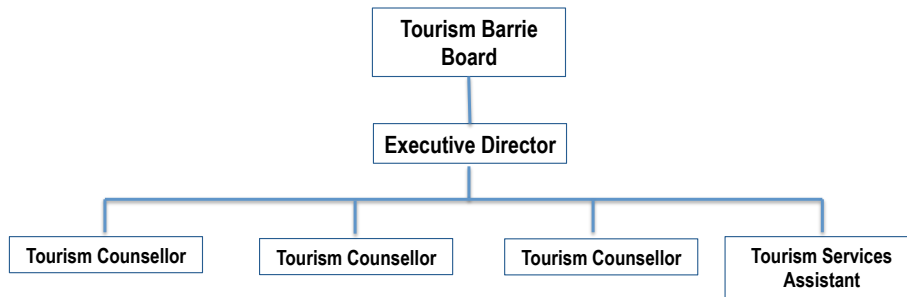
Tourism Kingston	Tourism London	Tourism Barrie	Tourism Brantford	Chatham-Kent Tourism
Rob Carnegie Director	Marty Rice Director of Advertising and Leisure Brian Ohl Global Spectrum	Kathleen Trainor Executive Director Rudi Quammie Williams Director of Culture City of Barrie	John Frabotta Director, Economic Development & Tourism Nicole Drake Arts & Culture Coordinator	Mike Burton , Director, Economic Development Services Darlene De Beck , Administrative Assistant

Appendix 7: Benchmark Municipalities Organization Charts & Staffing Summary

Tourism London

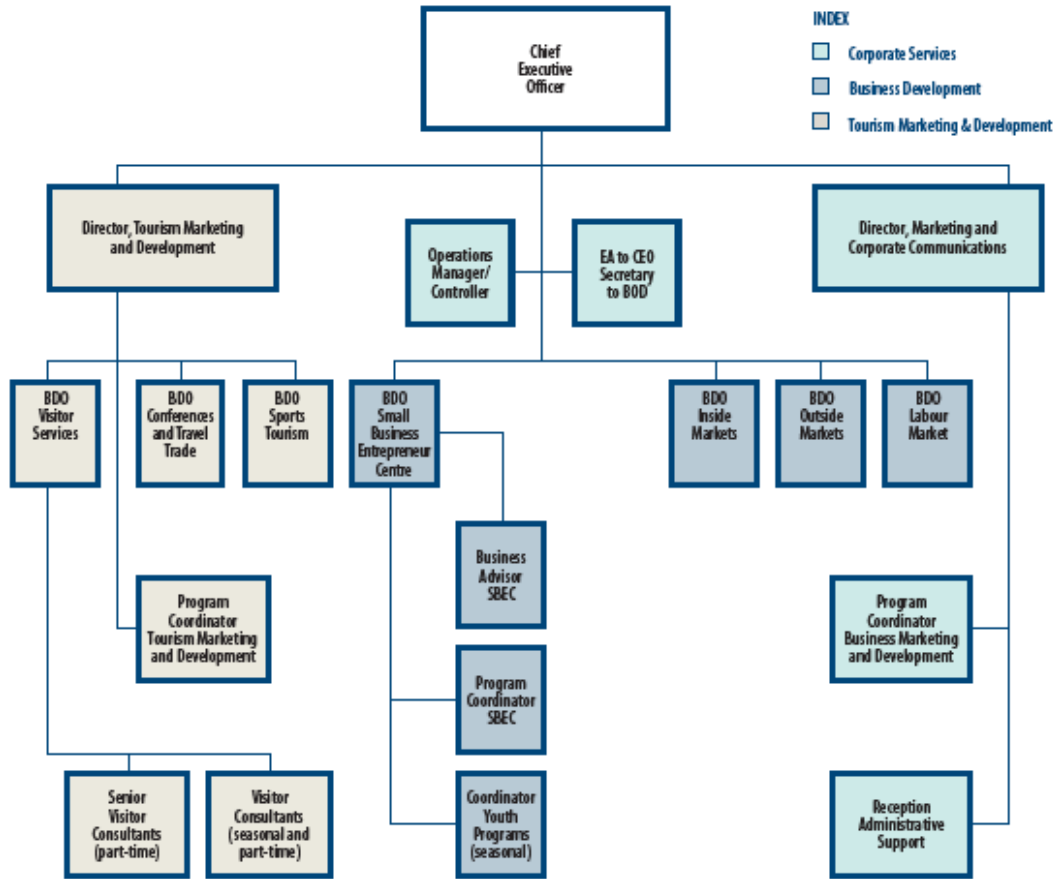


Tourism Barrie

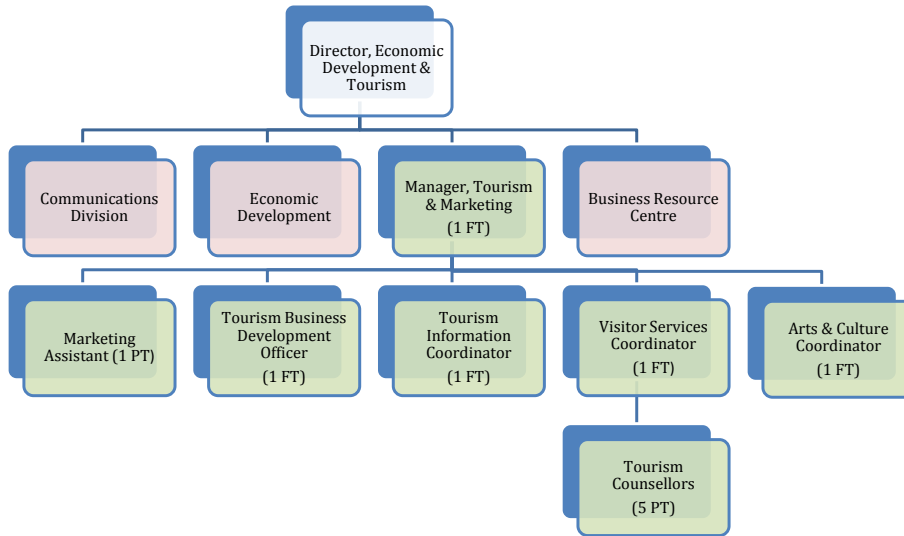


KEDCO - City of Kingston

KEDCO ORGANIZATIONAL CHART



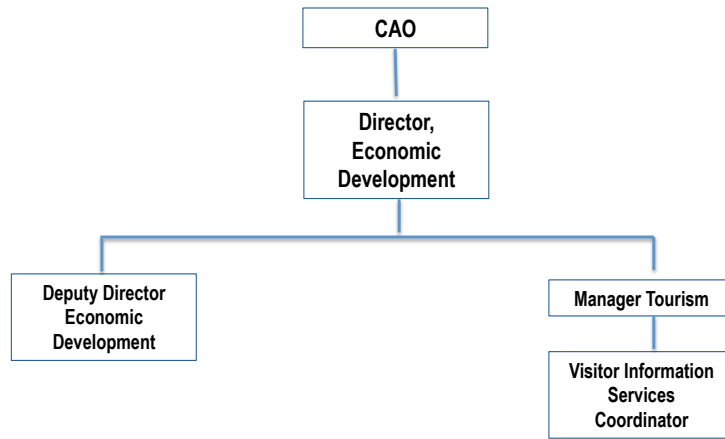
City of Brantford – Economic Development & Tourism Department – Tourism Division
Organizational Chart



Total Tourism Division Staff: 5 Full Time, 6 Part Time

Tourism Brantford Organizational Chart (2014)

Chatham-Kent Tourism



Tourism Services Staffing Summary

Guelph	London	Kingston	Barrie	Brantford	Chatham-Kent
4 FT, incl. GM & 4 PT	13 FT, incl. manager & 3 directors	6 FT, 2 PT, 6-7 seasonal (students) at Visitors Centre	3 FT & 1 PT	5 FT & 6 PT staff	3.8 staff
<ul style="list-style-type: none"> • General Manager • Supervisor Tourism Services • Marketing & Partnership Coordinator • Tourism Information Services Coordinator • 3 PT Travel Counsellors • 1 PT/contract Sales Coordinator 	<ul style="list-style-type: none"> • General Manager • Director, Leisure Travel, Advertising & Travel Media • Assistant, Leisure Travel, Advertising & Travel Media • Senior Tourist Counsellors (3) • Membership Assistance • Director, Conventions • Assistant Conventions Tourism • Director, Sports Tourism • Assistant, Sports Tourism • Information Services Coordinator 	<ul style="list-style-type: none"> • Director, Tourism Marketing & Development • BDO Visitor Services • BDO Conferences & Travel Trade • BDO Sports Tourism • Program Coordinator, Tourism Marketing & Development • Senior Visitor Consultants (PT) • Visitor Consultants (seasonal & PT) 	<ul style="list-style-type: none"> • Executive Director • Tourism Counsellors (3) • Tourism Services Assistant 	<ul style="list-style-type: none"> • Director, Economic Development & Tourism • Manager, Tourism & Marketing • Marketing Assistant (PT) • Tourism Business Development Officer (FT) • Tourism Information Coordinator (FT) • Visitor Services Coordinator (FT) • Tourism Counsellors (5 PT) 	<ul style="list-style-type: none"> • Director, Economic Development • Deputy Director, Economic Development • Manager, Tourism • Visitor Information Services Coordinator

Chart XIII: Draft Implementation Framework

Key:

Plan	
Implement	
Ongoing	

TISAC - Tourism Industry Stakeholder Advisory Committee

Recommendations	Priority	Lead & Principal Support Departments / Managers	Timing											
			2014		2015			2016			2017			
Organization & Governance														
1. Establish revitalized Tourism Services dept. with Tourism Industry Stakeholder Advisory Committee	H	General Manager, Culture & Tourism (GM) Supervisor, Tourism				-	-	-	-	-	-	-	-	-
Municipal Funding														
2. City should reconfirm ongoing financial support for tourism services	H	GM, Exec.Dir. Community & Social Services CAO, Council			-	-	-	-	-	-	-	-	-	-
3. City should increase financial commitment for tourism marketing & product development, & supportive programming & events at Sleeman & River Run Centres	H	GM; Exec. Dir. Manager Culture Development Managers – Facilities						-	-	-	-	-	-	-
4. City should consider a destination marketing fee	M	Supervisor, Tourism Coordinator,										-	-	-

Recommendations	Priority	Lead & Principal Support Departments / Managers	Timing													
			2014		2015			2016			2017					
5. Tourism Services should develop sponsorships & private financing to support marketing & promotion	L	Supervisor, Tourism; TISAC											-	-	-	-
6. Tourism Services should reduce costs for print publications through self-financing by tourism partners & use of digital media	M	Supervisor, Tourism Tourism Services Staff														
7. Tourism Services should leverage financial resources through other levels of government	H	Supervisor Tourism														
Stakeholder Satisfaction & Engagement																
8. Establish Tourism Industry Stakeholder Advisory Committee	H	GM, Supervisor Tourism														
9. Hold information/planning session with Committee to review report's recommendations																
10. Establish 2 sub-committees – 1. Marketing & Promotion 2. New Product Development																
11. Create Guelph Ambassador program																
Tourism Services Valued by Stakeholders																
12. Tourism Services to ensure the provision of stakeholder priority services	H	GM, Supervisor Tourism														
13. Tourism investment attraction – Enterprise/Econ.Dev. supported by Tourism Services	L	GM, Exec. Dir. Enterprise Services														

Recommendations	Priority	Lead & Principal Support Departments / Managers	Timing															
			2014			2015			2016			2017						
		GM, Econ. Dev.																
Tourism Branding, Marketing & Product Development																		
14. Tourism Services should explore further development of Visit Guelph brand	M	Supervisor Tourism & Staff																
Guelph Lacks Major Tourism Generators																		
15. Tourism Services & Stakeholder Advisory Committee to explore creation of a major tourism generator	M	GM, Supervisor Tourism TISAC																
16. Tourism Services should pursue leisure market with available resources	M	Supervisor Tourism & Staff																
Visiting Friends & Relatives & Corporate Business Travel to be Given Greater Priority																		
17. Tourism Services to focus more on VFR and corporate markets	H	Supervisor Tourism & Staff																
Sports Tourism Has Potential but City a Late Entrant																		
18. Tourism Services should give greater priority to pursuing sports tourism		Supervisor Tourism & Staff																
Tourism Services Working Well with County, RTO 4 & Others																		
19. Tourism Services should continue to work collaboratively with County, RTO 4 & other tourism organizations & attractions	M	Supervisor Tourism & Staff																
Need for Performance, ROI Measurement																		

Recommendations	Priority	Lead & Principal Support Departments / Managers	Timing														
			2014		2015			2016			2017						
20. Tourism Services should develop performance measurement system & performance measures	M – H	Supervisor Tourism & Staff with industry support	■	■	■	■	■	■	■	■	■	■	■	-	-	-	-
Communications, Visitor Services, Website & Social Media																	
21. City & Tourism Services should reconsider how Tourism Information Centre provides services	H	GM, Supervisor Tourism	■	■	■	■	■	■	-	-	-	-	-	-	-	-	-
22. Tourism Services should continue to develop website & use of social media	M	Supervisor Tourism & Staff			■	■	■	■	■	■	■	■	■	-	-	-	-
23. Tourism Services should develop a process for updating information	M	Supervisor Tourism & Staff			■	■	■	■	■	■	■	■	■	-	-	-	-
24. Tourism Services should develop a “native app” for smart phones, tablets	L	Supervisor Tourism & Staff						■	■	■	■	■	■	-	-	-	-
25. Tourism Services should actively monitor online usage statistics	M	Supervisor Tourism & Staff						■	■	■	■	■	■	-	-	-	-
26. Tourism Services should explore with City hotels a daily webcast of “What’s Happening in Guelph”	M	Supervisor Tourism & Staff & hotels					■	■	■	■	■	■	■	-	-	-	-
City & Region Infrastructure Improvements Could Benefit Tourism																	
27. City, Tourism Services, Transportation should develop way-finding signage plan	M	GM, Supervisor Tourism, Exec. Dir. Transportation					■	■	■	■	■	■	■	■	-	-	-
Go Transit																	
28. City & Tourism Services should encourage GO Transit to expand schedule	M	GM, Exec. Dir. Transportation		■	■	■	■	■	■	■	■	■	■	-	-	-	-

Recommendations	Priority	Lead & Principal Support Departments / Managers	Timing													
			2014		2015				2016				2017			
Upgrades to City Facilities																
29. City should consider upgrading existing facilities, Sleeman & River Run Centres to meet technical & broadcast requirements	M	GM, Manager Culture Development Managers Facilities											-	-	-	-