

Niagara-on-the-Lake Tourism Strategy, Master Plan, & Action Plan (2024-2028)

Committee of the Whole
Meeting

March 19, 2024



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Acknowledgements



The Niagara-on-the-Lake (“NOTL”) Tourism Strategy, Masterplan and Action Plan (2024-2028) is the culmination of a strategic process that included research and analysis, public engagement, and plan development.

It was created by the CBRE Team with the support of:

- Town of NOTL Staff
- **NOTL Tourism Strategy Committee** (10 members, inclusive of 2 Town Councillors)

Project Phasing

PHASE 1 	PHASE 2 	PHASE 3 	PHASE 4 	PHASE 5 
Environmental Scan & Destination Analysis	Economic Impact Assessment	Vision and Focus	Draft Strategy, Masterplan & Action Plan	NOTL Tourism Strategy, Masterplan & Action Plan
Key Tasks <ul style="list-style-type: none"> – Literature Review – Stakeholder Consultation – Asset Inventory – Organizational Review – PESTLE & SWOT Deliverables <ul style="list-style-type: none"> – Draft Report Due: Jun 9 – TSC Meeting #1: Aug 15 – TSC Meeting #2: Sep 7 	Key Tasks <ul style="list-style-type: none"> – Benchmarking & Performance Metrics – Economic Impact Assessment Review Deliverables <ul style="list-style-type: none"> – Draft Report Due: Jun 30 – TSC Meeting #1: Aug 15 – TSC Meeting #2: Sep 7 – Council Presentation: Sep 19 	Key Tasks <ul style="list-style-type: none"> – Visioning Session – Draft Vision, Focus, and Strategic Priorities Deliverables <ul style="list-style-type: none"> – Strategic Priorities Memo due: Sep 15 – Visioning Session: Sep 20 – Draft Report Due: Oct 6 – TSC Presentation: Oct 16 	Key Tasks <ul style="list-style-type: none"> – Recommended Draft Strategy Deliverables <ul style="list-style-type: none"> – Draft Report: Nov 30 – TSC Presentation: Dec 18 – Incorporate Edits to Draft Strategy – Draft Final Strategy and Draft Action Plan: Jan 2024 	Key Tasks <ul style="list-style-type: none"> – Final NOTL Tourism Strategy, Masterplan and Action Plan Report – High Quality Publication – Final Presentations Deliverables <ul style="list-style-type: none"> – Final Report (unformatted): Jan 31 – Final Report Presentation to Council (Mar 19)

NOTL's Tourism Positioning

Federal Ministry of Agriculture, Lawrence MacAulay called Niagara "one of the top wine regions in the world and is a player in the \$11 billion injected into the Canadian economy annually."

"Canada's wine sector creates jobs, drives economic growth, and supports so many communities right across the country," MacAulay said.

- Niagara-on-the-Lake ("NOTL") is a well-known Canadian tourist destination
- The Town is made up of 5 distinct neighbourhoods and rural areas
- 22% of all businesses are tourism-related; most are accommodations, culture & retail
- Municipal Accommodation Tax ("MAT") revenue split between Tourism NOTL (marketing) and the Town of NOTL
- Town's portion of MAT has potential to fund tourism infrastructure projects and drive new tourism investment
- New Tourism Strategy sets the course for the sustainable growth of NOTL's visitor economy (2024-2028)



OVERALL TOURISM GOAL:

To enhance sustainable growth of tourism businesses,
overnight visitation and spending in NOTL.

VISION STATEMENT:

Niagara-on-the-Lake is an extraordinary wine country destination, known for its natural beauty and unrivaled cultural experiences.

NOTE: Cultural experiences includes arts, culture, heritage and historic experiences, and theatre

VALUES:

- Authenticity
- Collaboration and Communication (*Engagement and relationships*)
- Community Pride and Responsibility (*Municipality, businesses, residents and visitors*)
- Inclusivity (*Accessibility*)
- Preservation and Regeneration (*of heritage, beauty and infrastructure*)

Tourism
Strategy
Components

4 Priority Areas

4 Priority Objectives

18 Indicators of Success

68 Specific Actions

Strategic Priorities and Objectives

Strategic Priorities provide structure to the Strategy and each Objective is key to fulfilling the Tourism Vision

Priority	Priority Objective
Governance and Destination Management	Develop a sustainable tourism ecosystem with clear organizational roles, responsibilities and dedicated resources
Product and Experience Development	Adopt a strategy to enhance the Town's best assets, define the Experience Corridors, and capitalize on new development to broaden NOTL's market base
Visitor Infrastructure and Investment Attraction	Approach economic and community development through a tourism lens
Destination Marketing	Adopt the Tourism Vision for NOTL as an outward-facing brand, leading with NOTL's best experiences

Governance and Destination Management



Strategic Actions (31 in total)

- Create a dedicated Economic Development and Tourism Director to manage Tourism at the Town and ensure effective strategy implementation
- Establish the Tourism Strategy Committee as an ongoing Committee of Council
- Review and execute on recommended roles and responsibilities with Tourism NOTL
- Develop overall goal for use of MAT revenue: to ensure NOTL is a profitable and sustainable destination for visitors, businesses & residents

Governance and Destination Management



Strategic Actions (continued)

- Develop 2 distinct funds for use of MAT revenue to fund tourism initiatives:
 - I. NOTL Destination Management Fund
 - II. NOTL Destination Development Fund
- Create resources and supports for tourism businesses
- Streamline Tourism NOTL website for visitors and Town’s website for tourism businesses and investors
- Develop a program to track visitation – 3rd party and industry-generated data
- Develop a tourism awareness program for residents and municipal leaders

Product and Experience Development



Strategic Actions (11 in total)

- Define Product and Experience Development Plan for NOTL:
 - I. Enhance what exists today and categorize those offerings into Product Clusters – using Tourism Product Inventory
 - II. Develop NOTL’s Experience Corridors (ECs) and integrate product clusters
 - III. Attract new products and experiences for NOTL that fit within the Experience Corridors
- Allocate Experience Corridor, product cluster development, and itinerary building to Tourism NOTL
- Allocate investment attraction and tourism-related infrastructure projects to Economic Development and Tourism Director

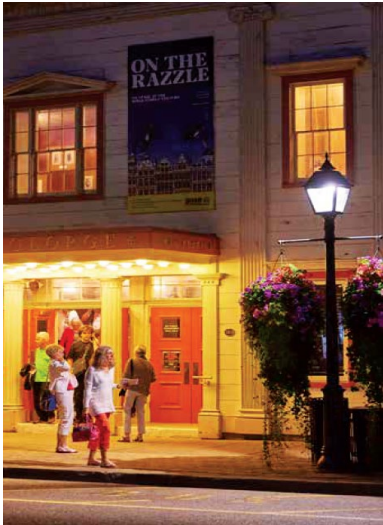
Product and Experience Development



Strategic Actions (continued)

- Develop NOTL’s Product Clusters and define the product offering and visitor appeal within each Cluster:
 - Cultural experiences (including arts, culture, heritage/historic experiences & theatre)
 - Agri-tourism
 - Wineries & related experiences
 - Nature & outdoor activities (including gardens)
 - Culinary experiences & restaurants
 - Major festivals & events
 - Breweries, distilleries & cideries
 - Retail & shopping
 - Recreation & sports
 - Conferences & business events (including sustainable business event initiatives)
 - Spas & wellness

Product and Experience Development



Strategic Actions (continued)

- Identify main travel routes through NOTL and define boundaries for the NOTL ECs, including but not necessarily limited to:
 - Niagara Stone Road (55)
 - York Road (89) connecting Glendale to St. Davids and Queenston
 - Niagara River Parkway
 - Lakeshore Road (87)
 - Queen Street / Historic Old Town
 - Four Mile Creek Road (100)
- Initiate a wayfinding strategy that incorporates both hard assets (signage) and digital navigation (based on digital maps and directions) for each of the ECs.
- Create assessment criteria to help guide new investment within NOTL's ECs

Visitor Infrastructure and Investment Attraction



Strategic Actions (14 in total)

- Ensure financial support for Visitor Infrastructure and Investment Attraction initiatives allocated from Town's portion of MAT funding
- Collaborate and explore opportunities with NOTL's businesses to connect visitors with transit and parking solutions
- Prioritize and plan infrastructure requirements for the Town and using NOTL Destination Development Fund revenue – focusing on parking infrastructure, Hop-on Hop-off Bus, Park and Pedal Plan
- Advocate for enhancements at Niagara Regional Airport
- Develop Experience Corridor Wayfinding strategy, including signage and relevant infrastructure initiatives

Destination Marketing



Strategic Actions (12 in total)

- Ensure all marketing and promotion allocated to the Town’s DMO: Tourism NOTL
- Adopt NOTL’s Tourism Vision and undertake a visitor branding exercise for NOTL, along with collateral and brand manual
- Create an awareness marketing plan to showcase the best experiences in wine country and build marketing assets
- Aggressively market Experience Corridors and Product Clusters for wider recognition, promoting the “best of NOTL” first, and then year-round experiences

Implementation Plan



Implementation Process

- Each strategic action item has allocated roles, timelines, priority and budget
 - **Partners:** lead and support organizations
 - **Timeframe:** immediate (<6 months), short-term (<1 year), medium-term (Year 2-3), long-term (>year 3)
 - **Priority level:** critical, high priority or medium priority
 - **Budget:** estimated based on market intelligence (where applicable)
- Performance Metrics link actions to specific outputs and desired outcomes

Implementation Plan

25 Actions to Complete in the Next 6 Months

PRIORITY #1 – Governance and Destination Management

PRIORITY OBJECTIVE – Develop a sustainable tourism ecosystem with clear organizational roles, responsibilities and dedicated resources

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Leadership is established and capacity building enhanced will NOTL's tourism ecosystem	1. Create a dedicated Economic Development and Tourism Director to manage Tourism at the Town of NOTL, potentially within the Community & Development Services or Planning Department; whose role would be to	Town of NOTL , Tourism Strategy Committee	Immediate	Critical	TBD (Incremental \$30,000 to

PRIORITY #2 – Product and Experience Development

PRIORITY OBJECTIVE – Adopt a strategy to enhance the Town's best assets, define the Experience Corridors, and capitalize on new developments to broaden NOTL's market base

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
A Product and Experience Development plan is identified, and responsibilities assigned	1. Define the Product and Experience Development Plan for NOTL: a. Enhance what exists today and categorize those offerings into Product Clusters	Tourism NOTL , Town of NOTL, Chamber of Commerce, Tourism	Immediate	Critical	N/A

PRIORITY #3 – Visitor Infrastructure and Investment Attraction

PRIORITY OBJECTIVE – Approach economic and community development through a tourism lens

Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Municipal roles and responsibilities for tourism investment attraction and visitor infrastructure are established	1. All hosts all Visitor Infrastructure and Investment Attraction related roles 2. Elicit 3. P 4. E 5. C	Town of NOTL , Tourism	Immediate	Critical	N/A

PRIORITY #4 – Destination Marketing

PRIORITY OBJECTIVE – Adopt the Tourism Vision for NOTL as an outward-facing brand, leading with NOTL's best experiences

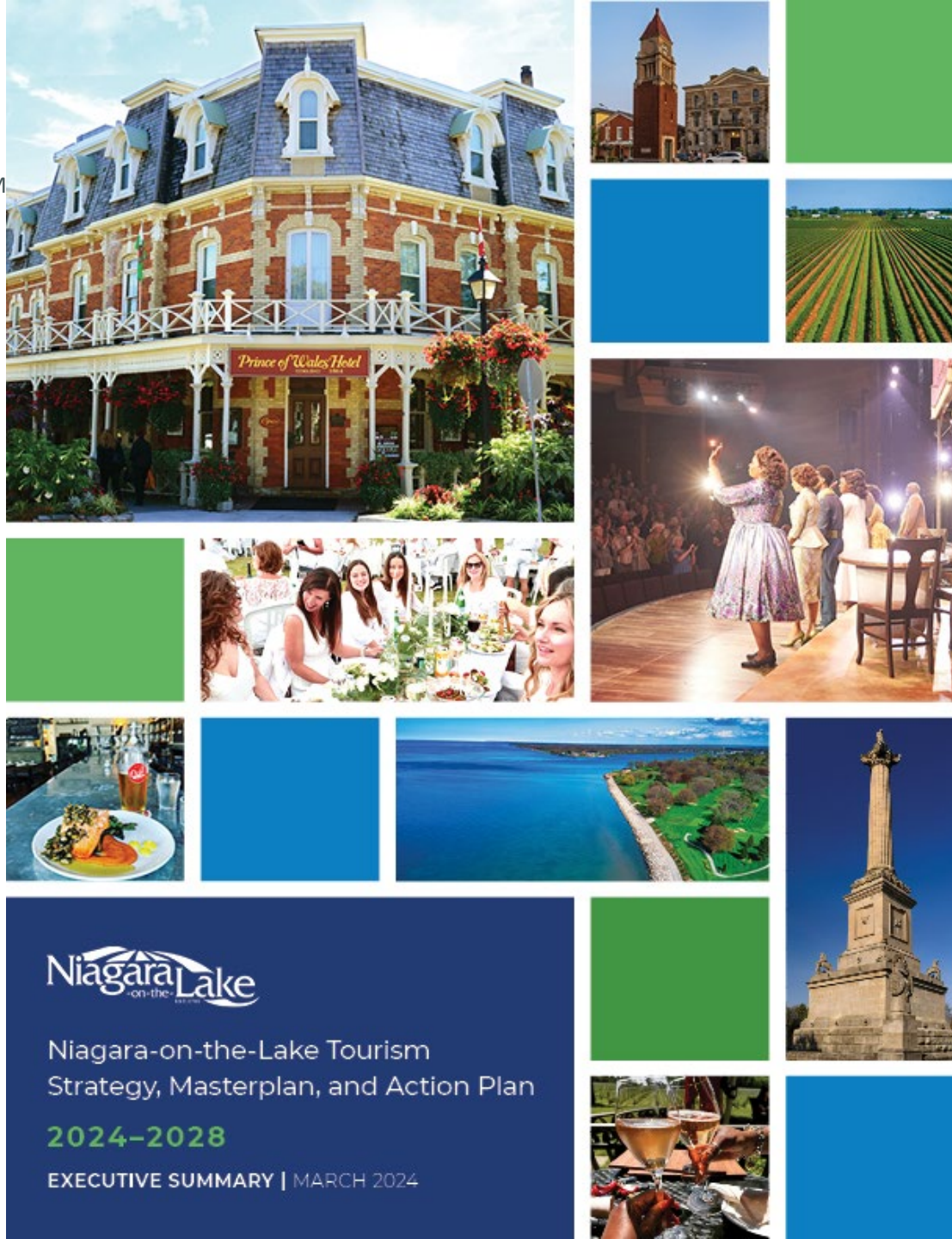
Indicators of Success	Strategic Actions	Partner (Lead in Bold)	Time Frame	Priority	Estimated Budget
Roles and responsibilities for marketing and promotion of the destination are allocated	1. Ensure all marketing and promotion, including building the visitor-facing website, are allocated to the Town's DMO: Tourism Niagara-on-the-Lake ("Tourism NOTL") 2. Adapt Tourism NOTL's existing Marketing Strategy to support NOTL's Tourism Vision and initiate branding efforts 3. Collaborate with regional tourism partners to leverage the regional Niagara experience and position NOTL as a hub for a premium wine country experience in Niagara	Tourism NOTL , Town of NOTL, Tourism Strategy Committee Tourism NOTL , Town of NOTL, Tourism Strategy Committee Tourism NOTL , Tourism Strategy Committee, TPN, regional municipalities	Immediate	Critical	N/A
A visitor-facing brand is developed for NOTL as a destination, distinct from the civic brand identity	4. Undertake a visitor branding exercise for NOTL that aligns with the Tourism Vision and NOTL's civic brand identity. a. Build a dynamic and memorable personality for NOTL's visitor brand—considering NOTL as both a day-trip and overnight destination that is high-quality and appealing b. Create a unique and engaging logo and tagline for the NOTL's visitor brand 5. Develop collateral materials using the new visitor brand	Third-party consultant / Tourism NOTL , Town of NOTL, Tourism Strategy Committee Third-party consultant / Tourism NOTL , Tourism Strategy Committee	Immediate	Critical	\$50,000 (brand strategy) \$10,000 to \$15,000

A responsibility framework is formalized at internal processes are established to maintain a sustainable tourism ecosystem in

A responsibility framework is formalized and internal processes are established to maintain a sustainable tourism ecosystem in NOTL

Executive Summary

Concise summary of the Tourism Strategy to be distributed to key stakeholders, investors and community members



Niagara Lake
on-the-Lake

Niagara-on-the-Lake Tourism
Strategy, Masterplan, and Action Plan

2024-2028

EXECUTIVE SUMMARY | MARCH 2024