



Kitchener-Waterloo Oktoberfest Strategic Plan 2023-2025

June 2022

Background

Given the massive changes in context globally, regionally and as an organization in recent years, Kitchener-Waterloo Oktoberfest Inc. (KWO) engaged Dr. Rebecca Sutherns of Sage Solutions (rebeccasutherns.com) in the fall of 2021 to facilitate a collaborative strategic planning process.

Like most tourism and festival operations, KWO has been deeply impacted by the COVID-19 pandemic. With the anticipation of returning to normal programming in 2022, the time was right to do a substantial rethink to reimagine the future of the festival. The Oktoberfest festival has changed significantly over its first 50 years, and it will continue to adapt to changes in the community, festival patrons' desires, and in its contribution towards the economic vitality of the region.

Rebecca worked with KWO's strategic planning project team, comprised of its Executive Director, President, and representatives from staff and the Board of Directors to develop the resulting strategy that is focused but adaptable, centered around a refreshed vision for the future of the festival.

Methodology

The strategic planning process included:

- Consultation with festival stakeholders through an [online survey](#) (124 responses) and three [focus groups](#) (34 participants) in February 2022. Stakeholder representation included KWO staff, Board members and volunteers, festival participants, sponsors and vendors, community/civic partners, Festhalle operators and representatives from the tourism/ hospitality sector. Feedback was presented to the strategic planning team, along with the [comparator research](#) conducted on similar festivals as identified by KWO.
- A series of facilitated planning workshops in March for the Steering Committee (Board and staff reps) to work through key issues and topics that resulted from the stakeholder feedback. These conversations helped the group make a number of key decisions for the festival and clarify the emerging vision for its future.
- Preparation of a draft strategic plan (Priorities and Goals, rough Objectives) submitted by the consultant to the Executive Director in early April
- Objectives and Expected Results drafted internally and reviewed with consultant in mid-June
- Final draft strategy, with aligned implementation, monitoring and reporting templates, provided to KWO in June for Board input and approval in July.

Vision for the Festival of the Future

For over 50 years Kitchener-Waterloo Oktoberfest has celebrated the region's Bavarian roots through food, music and festivities. It is recognized as Canada's Greatest Bavarian Festival and one of the largest Oktoberfest celebrations in the world. The Festival of the Future will remain true to its Bavarian theme, but also celebrate our local community with a focus on family-friendly activities, and being a truly welcoming, inclusive and accessible event for locals and for visitors alike.

The Festival will provide a wide variety of activities, and local food and beverage options over the course of the event. Festival patrons will feel welcome and safe, finding a diverse range of activities at a few key locations with easy access for transportation between sites, and friendly volunteers and ambassadors to help them along the way.

The Festival of the Future will be strongly supported throughout the community, with visible engagement from local businesses, government and community partners and will help build a strong sense of community. The operation of the Festival will be financially sustainable and explore options for funding and other revenue streams, while also ensuring the Festival itself is financially viable and includes affordable options for participants.

Kitchener-Waterloo Oktoberfest will celebrate a mix of new and nostalgia, creating a unique, memorable and wunderbar experience for all.

This will happen through greater openness – an affirmation that Oktoberfest belongs to the whole community. It will require and update in terms of both mindset and design, while ensuring the festival stays true to its heritage, differentiation and brand. Look at us now!

Strategic Priorities

To deliver proactively on a refreshed vision for the festival that is clear, compelling and successful: a community celebration with a Bavarian theme. The more the merrier!

1. Offer visitors a world class experience
2. Build community engagement
3. Secure long term financial viability of the festival

Strategic Plan Summary

Priorities	Goals	Objectives	Expected Results by 2025
I. Offer visitors a world class experience	I.1 Create a truly inclusive and welcoming festival that reflects the age, gender, ethnic and income diversity of our communities	I.1.1 Build new collaborations with diverse organizations to help a wider range of people feel welcome at the festival	<ul style="list-style-type: none"> • New partnerships established • Marginalized groups in our community are engaged and feel welcome at KWO • Attendance by more diverse patrons has improved
		I.1.2 Enhance festival accessibility	<ul style="list-style-type: none"> • Greater Oktoberfest presence in central, familiar locations routinely accessed by diverse participants • Experiences available at a range of price points • New residents of our region know about the festival and how to get engaged. • People are and feel safe attending the festival
		I.1.3 Ensure festival volunteers and staff are reflective of and equipped to serve a diverse population	<ul style="list-style-type: none"> • Festhallen and KWO volunteers/staff are trained to understand and serve our changing community with sensitivity • Diverse volunteers are recruited and retained to contribute to festival planning and delivery, including at all age levels
	I.2 Provide outstanding customer service	I.2.1 Make Oktoberfest experiences and merchandise easy to buy through digital transformation	<ul style="list-style-type: none"> • Advanced Point of Sale technology in place • Website continuously updated • New technology corporate partners engaged in supporting the festival
		I.2.2 Ensure marketing of festival offerings is consistent and clear	<ul style="list-style-type: none"> • Web-based systems and social media tools are fully leveraged to promote the festival • All festival offerings are similarly branded and marketed in an integrated, consistent way
		I.2.3 Enhance greeting and wayfinding throughout the community	<ul style="list-style-type: none"> • Patrons report greater ease of festival navigation

Priorities	Goals	Objectives	Expected Results by 2025
	1.3 Offer a higher density of fun activities featuring unique Bavarian culture in multiple linked locations	1.3.1 Examine the length of the festival with broader program offerings	<ul style="list-style-type: none"> • Ensure broad stakeholder engagement of the appropriate timing and length of festival. • Festival is known as a Thanksgiving weekend event, with Festhallen engaged during a longer period if they wish • Core programs further developed, including Willkommen Platz, official keg tap and parade • More family activities have been included in the festival • New offerings (such as sporting events and culinary programs) have been explored and included if viable
		1.3.2 Ensure daytime, family-friendly animation at clear, central locations	<ul style="list-style-type: none"> • A downtown Kitchener hub of daytime programming animated and recognized • Groundwork laid for future Oktoberfest hubs in Uptown Waterloo, Belmont Village and Cambridge
		1.3.3 Increase Festhallen capacity so more visitors can attend the festival	<ul style="list-style-type: none"> • Festhallen capacity has increased to pre-pandemic numbers (through either increase festhallen or increased patrons in existing) • KWO will develop a Festhallen taskforce to develop a longer-term strategy for Festhallen. This strategy will include (but not limited too) increasing festhallen capacity, engagement, and support to ensure success and sustainability. • The taskforce should include members from board, operations council, festhallen (from large and small). • Establish the taskforce in 2023 with a draft strategy to the board for consideration by 2024.
	1.4 Invest in ease of safe movement,	1.4.1 Build local transit linkages from the Kitchener downtown core to	<ul style="list-style-type: none"> • Kitchener Transit Hub brings festival patrons to the Willkommen Platz and other Festhallen locations • Future expansion to new hubs has been explored

Priorities	Goals	Objectives	Expected Results by 2025
	locally and regionally	Festhallen and other festival hubs	
		1.4.2 Partner with various tourism transit organizations to bring Festhallen patrons from outside the community	<ul style="list-style-type: none"> Partnerships exist with bus tours, train partners and airlines
		1.4.3 Maximize walkable locations for festival activities	<ul style="list-style-type: none"> Number of walkable events has increased
2. Build community engagement	2.1 Bolster a shared vision of a single Bavarian themed festival that belongs to the community	2.1.1 Encourage festival visibility across numerous sectors in the community	<ul style="list-style-type: none"> Stores, restaurants and other businesses in all parts of the region choose to promote Oktoberfest in various creative ways Integrated marketing campaigns unite all Festhallen and events Post-secondary students are frequenting the festival
		2.1.2 Build connections and programming throughout the region, including in Cambridge, Waterloo and the Townships	<ul style="list-style-type: none"> City and Regional staff as well as economic development organizations and Township Councils have developed Oktoberfest themed programming in their facilities and locations
		2.1.3 Make the Oktoberfest Cares initiative viable and robust	<ul style="list-style-type: none"> Oktoberfest Cares is established, and an annual granting process implemented
3. Secure long term financial viability of the festival	3.1 Develop a clearer value proposition to expand support from new partners	3.1.1 Ensure multiple levels of government understand the value of KW Oktoberfest	<ul style="list-style-type: none"> Civic decision makers are aware of KWO's economic impact and make data-driven decisions about the festival with a focus on regular contributions to the festival Aligned civic and public health partner goals are met

Priorities	Goals	Objectives	Expected Results by 2025
		3.1.2 Ensure existing and new corporate partners maximize the value they achieve from festival offerings	<ul style="list-style-type: none"> Provide quantitative ROI for sponsorship expenditures Capture and communicate data to enable effective sponsorship decision making
		3.1.3 Improve financial health of the KWO	<ul style="list-style-type: none"> Budget is balanced Financial reserve fund of \$100,000 has been established Complete a review of sponsorship assets and strategies to maximize financial impact
	3.2 Pilot ideas for revenue expansion	3.2.1 Increase fee-for-service revenue	<ul style="list-style-type: none"> Non-Festhallen hospitality partners engaged Range of services provided by KWO has expanded, including festival expertise consulting and convention services
		3.2.2 Expand the KW Oktoberfest brand to encompass year-round events	<ul style="list-style-type: none"> Women of the Year (WOY) event launched on International Women's Day (March) New programming added to KWO's shoulder seasons Explored financial and branding viability of aligning with other organizations (such as City of Kitchener event operations, other festivals, service clubs, BIA's)
		3.2.3 Expand revenue and cost sharing possibilities	<ul style="list-style-type: none"> Equipment rental revenue has expanded Annual think tank/scrum planning session occurs, with one new initiative implemented annually Work with other festivals and agencies
		3.2.4 Expand connections and sponsorship base to new local businesses and sectors	<ul style="list-style-type: none"> B2B, B2C alliances expanded, resulting in increased revenue "Techtoberfest" is thriving More options available for sponsorship, such as naming rights

Priorities	Goals	Objectives	Expected Results by 2025
	3.3 Explore cost sharing arrangements	3.3.1 Lead a festival network initiative with Regional Economic Development staff	<ul style="list-style-type: none"> Parameters and possibilities of the network are understood. Pilot underway.
	3.4 Ensure KWO has the best staff, volunteers and partners equipped to achieve its strategic priorities	3.4.1 Establish a strategic and sustainable blend of staff and volunteers	<ul style="list-style-type: none"> Volunteer (with the appropriate knowledge and skills) have increased Volunteer hours are appropriate and sufficient to meet strategic priorities Volunteers report a positive experience Staffing is sufficient, effective and aligned with strategic priorities
		3.4.2 Ensure KWO's activities are focused on the services it is best equipped to provide	<ul style="list-style-type: none"> Strategic partnerships established with local event organizations that can organize and physically run events, allowing KWO to focus on marketing and promotions

