

Municipality of South Bruce Tourism Industry Effects Study

Deloitte LLC
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Contents

| | |
|--|----|
| Land Acknowledgement | 1 |
| Study Methodology | 2 |
| 1. Executive Summary | 4 |
| 2. Current Tourism Industry | 7 |
| 3. Potential Changes in Demand | 20 |
| 4. Potential Changes in Tourism Demand Related to NWMO | 29 |
| 5. Addressing Changes in Demand | 44 |
| 6. Strategies to Increase Tourism | 55 |
| 7. Recommendations | 58 |
| Appendix A: Study Charter | 59 |
| Appendix B: Strengths, Opportunities, Aspirations, Risks, Results Assessment | 66 |

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Land Acknowledgement

It is acknowledged that the lands and communities discussed in this report are situated on the Traditional Territory of the Anishinabek Nation:

The People of the Three Fires known as Ojibwe, Odawa, and Pottawatomie Nations. The Chippewas of Saugeen and the Chippewas of Neyaashiinigiing (Nawash), now known as the Saugeen Ojibway Nation, are the traditional keepers of this land and water. It is also recognized that the ancestors of the Historic Saugeen Métis and Georgian Bay Métis communities shared this land and these waters.

Study Methodology

The Municipality of South Bruce undertook a Tourism Industry Effects Study¹ to identify opportunities to expand the tourism sector in a way that complements the unique natural and agricultural character of the community. The study was to identify the potential changes in tourism that will result from the implementation of the Nuclear Waste Management Organization (NWMO) Project as people come to visit the Deep Geological Repository (DGR) and the associated Centre of Expertise. This study was conducted to assess various strategies for expansion of the tourism industry in South Bruce which could meet the change in demand associated with the Project, while also preserving the unique natural and agricultural character of the community. MDB Insight Inc. (which was acquired by Deloitte LLC in April 2022) assisted in the process, throughout the development of research and analysis for the Tourism Industry Effects Study, including all stakeholder engagement aspects of the Study.

Phase 1 (Study Initiation) of the Tourism Industry Effects Study included a project launch meeting, and the preparation and approval of a Study Charter and workplan.

Phase 2 (Tourism Asset Review / Trends and Perceptions / Visitor Market Review and Analysis) included a basic tourism asset inventory, background document review, economic profile, and reviews of tourism expansions, visitor perceptions, and tourism trends. A basic service delivery analysis was performed, along with a Centre of Expertise plan, program review and analysis. Best practices and benchmarking were reviewed from other communities. A summary of inputs was presented to municipal staff.

Phase 3 (Identifying Opportunities for Maximizing Local Employment) included an analysis of strengths, opportunities, aspirations, risks, and results. An incremental opportunity analysis was developed in regard to additional visitors and the Centre of Expertise. A tourism industry vision development workshop was completed. Tourism development options were summarized. The findings to date were reviewed in context to other Project studies.

Phase 4 (Reporting - Tourism Study) included the development of draft tourism study report and recommendations, with feedback from municipal staff. The Tourism Industry Effects Study was finalized, and changes were incorporated based on feedback. The final report was delivered and presented to the Community Liaison Committee.

Peer Review Approach

The Municipality of South Bruce is responsible for the completion of the Tourism Industry Effects Study, including leading the study and determining the scope and spatial boundaries. This study was undertaken by MDB Insight Inc. (acquired by Deloitte LLC) and was reviewed by GHD, as part of the Municipality of South Bruce Consultants Peer Review Protocol.

¹ In the original Study Charter, this report was referred to as the Tourism Study.

Guiding Principles

The Municipality of South Bruce adopted 36 Guiding Principles² which focus on safety for people and the environment, ensuring the NWMO Project brings meaningful benefits to the community, and ensuring the municipality has a voice in decision-making. South Bruce is seeking NWMO commitments on how it would meet or address these 36 expectations and aspirations for the Project. This is a key step in determining whether the Project is right for the community and will help people make an informed decision when a public referendum is held to measure the community's willingness to host the Project.

The Municipality of South Bruce Tourism Industry Effects Study informs the following Guiding Principles:³

- **10.** The NWMO will identify the potential for any positive and negative socio-economic impacts of the Project on South Bruce and surrounding communities and what community benefits it will contribute to mitigate any potential risks.
- **12.** The NWMO, in consultation with the Municipality, will establish a program to mitigate losses to business owners in the event that their business is adversely affected by the NWMO's site selection process and the development, construction and/or operation of the Project.
- **14.** The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote tourism in South Bruce and the surrounding communities.
- **19.** The NWMO will, in consultation with the Municipality, establish a Centre of Expertise at a location within South Bruce to be developed in conjunction with the Project.
- **23.** The NWMO will enter into an agreement with the Municipality providing for community benefit payments to the Municipality.

² Guiding Principles, southbruce.ca

³ Tourism Industry Effects Study and Strategy Principles, southbruce.ca

1. Executive Summary

The Tourism Industry Effects Study was commissioned by the Municipality of South Bruce to address specific objectives outlined in the Study Charter (Appendix A). The key deliverable of the study was to identify opportunities to expand the tourism sector in South Bruce in a manner that is consistent with the unique natural and agricultural character of the community. Specific objectives of the study included:

- Describing the attributes of South Bruce that support tourism.
- Identifying the potential changes in tourism that will result from the NWMO Project.
- Identifying strategies for expansion of the tourism industry to meet the changes in demand that would also preserve the unique natural and agricultural character of the community.

Considerations of the Project included documenting and describing:

- Any planned expansions that contribute to tourism.
- Any unique natural or agricultural features in the community that could benefit from additional tourism.
- Expected increases or decreases in tourism that will occur with the development of the NWMO Project.
- Initiatives put in place in other communities to increase tourism, especially those associated with industrial activities.
- Strategies that could increase visitation resulting from the NWMO Project to the benefit of the local tourism industry.

The Project methodology included reviews of tourism assets, tourism trends, visitor markets, and visitor perceptions related to the South Bruce tourism industry. The potential Centre of Excellence was reviewed from the perspective of economic opportunities. Best practices in other communities were reviewed. Options were considered to maximize local employment, and incremental opportunities were analyzed to attract additional visitors to the area. Feedback was sought from the South Bruce Tourism Committee, key tourism operators, business organizations, and County tourism staff. An interim report was prepared, and feedback was sought from representatives of the Municipality of South Bruce.



Research uncovered that any planned expansions related to tourism are only occurring in municipalities along Lake Huron, where much of the region's tourism strategy is focused. There are some existing features that could benefit from additional tourism marketing, such as specialty farms, cycling trails, and community downtowns. However, current travel patterns by visitors between major tourism nodes and urban areas in Southern Ontario mostly skirt the boundaries of South Bruce. Major intervention would be needed, through expensive marketing or wayfinding signage, to divert the traffic away from established patterns. Even then, South Bruce does not currently have a "core attractor" – a tourist destination capable of attracting visitors in a significant way.

South Bruce lacks a "core attractor" – a tourist destination capable of attracting visitors in a significant way.

When considering potential changes in tourism demand associated with the NWMO's proposed Deep Geological Repository (DGR) and Centre of Expertise, the full spectrum of potential change was considered - from the positive to the negative. From a worst-case perspective, given the small size of the current tourism industry and the lack of a South Bruce presence in regional tourism strategies, it is unlikely that the construction of the DGR could diminish the existing industry.

From the best-case perspective, the development of the Centre of Expertise could potentially generate enormous benefits. The more dynamic the programming at the Centre of Expertise, the more likely increased visitation and economic impact. The economy of South Bruce will benefit the most if programming at the Centre of Expertise focuses on acting as an international host, with world-class research and development facilities, frequent hosting and training of overseas professionals, and research and development (R&D) partnerships with international universities and start-ups.

On its own, the Centre of Expertise in South Bruce could generate \$7.5 million in annual visitor spending, and create 60 jobs, not including the potential spin-off benefits. However, local opposition to the Project could dampen enthusiasm for the Centre of Expertise. The major hinderance to future potential will be ambivalence or a lack of willingness on the part of local leaders and businesses to take advantage of opportunities arriving with more visitors and tourists.

The proposed Centre of Expertise could attract tens of thousands of visitors, generate \$7.5 million in annual visitor spending, and create 60 jobs, not including the potential spin-off benefits.

The report recommends that the Municipality of South Bruce pursue a proactive tourism investment model for the NWMO opportunity. This method would, over time, provide the highest positive benefit to the local tourism industry and the most compatible social benefits to the community. This strategic, intentional choice would include:

Local participation: Providing specific direction to the NWMO about the design, construction, and operation of the proposed Centre of Expertise, and about the project's alignment with and impact on other community, economic, and agricultural objectives.

Geology and public art: Leading the development of a Deep Rock Sculpture Garden for South Bruce, potentially engaging sculptors to create works for display on the grounds of the Centre of Expertise or in the community. The sculpture garden could use limestone excavated for the DGR, potentially spurring other public art opportunities.

International host facility: Pushing for the NWMO and senior levels of government to focus the primary purpose of the Centre of Expertise as an international host facility, positioning South Bruce as a world leader in the DGR space, and to attract as much worldwide visitation, spending, and investment in the facility and the local tourism industry.

The Centre of Expertise could become a leading international host facility, attracting as much visitor spending in the local tourism industry, as possible.

Communication: Articulating a clear framework to the private sector regarding the development of the local tourism industry, particularly in relation to the Centre of Expertise.

Maximum benefit: Developing financial collaborations between NWMO and the Municipality, other organizations, and the private sector to maximize the impact of the proposed Centre of Expertise.

The implementation of these recommendations would require leveraging the potential of the proposed Centre of Expertise and enhancing opportunities to benefit the local economy. This would require the development of a concrete tourism strategy and the allocation of administrative resources to execute the strategy.

2. Current Tourism Industry

The purpose of this analysis is to provide a snapshot of South Bruce’s current tourism industry and its various subsectors. This analysis includes current attractions, destinations, accommodations, dining experiences, and other tourism-related businesses, duration of visits, and any other information that is available on people who arrive in South Bruce for non-work-related reasons. This analysis will also explore any planned expansion of activities or facilities that contribute to tourism and describe any unique natural or agricultural features in the community that could benefit from additional tourism.

2.1 Definition of Tourism

Tourism, as defined by the World Tourism Organization,⁴ is “a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment⁵ for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure.”

Tourism is the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

Tourism does not include people commuting regularly between their place of usual residence and place of work or study, or frequently visiting places within their current life routine, for instance homes of friends or relatives, shopping centres, religious, healthcare or any other facilities that might be at a substantial distance away or in a different administrative area but are regularly and frequently visited.

2.2 Key Findings

Tourism Assets

- South Bruce currently has no major tourism assets and no core attractors.⁶ As a rural community, most visitation is organic (e.g., road traffic) with some unique local events (e.g., Flavours of South Bruce) generating visitation.
- There is strong potential to develop the identified emerging tourism assets into supporting tourism attractions. Top opportunities include developing agri/culinary

⁴ Definition of Tourism, World Tourism Organization, unwto.org

⁵ Definition of Usual Environment: The usual environment of an individual, a key concept in tourism, is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. The purpose of introducing the concept of usual environment is to exclude from visitors those travellers commuting regularly between their place of usual residence and place of work or study, or frequently visiting places within their current life routine, for instance homes of friends or relatives, shopping centres, religious, healthcare or any other facilities that might be at a substantial distance away or in a different administrative area but are regularly and frequently visited. Source: United Nations, unstats.un.org

⁶ A core attractor is a distinguishing feature of a destination that fuels the desire for someone to travel to that place rather than anywhere else (e.g., Stratford Festival Theatre, Canada’s Wonderland, Casino Rama).

tourism in partnership with local farmer groups and restaurants, increased investment in outdoor/recreation amenities (e.g., improved river access, expanded hiking, cycling, cross-country skiing trails), and event-based tourism. The initial findings report of the Recreation Master Plan supports these directions.⁷

Travel Corridors

- South Bruce is situated on highly travelled corridors between London, Kitchener, Hamilton, Stratford, and central and northern Bruce County.
- Some visitors could be attracted from bypassing corridors connecting central and northern Bruce County to Windsor, Guelph, Niagara Falls, and Barrie. This initiative would require additional wayfinding signage and marketing tactics.
- There are no highly travelled corridors crossing South Bruce from Toronto.

Planned Expansions and Unique Features

- There are currently no planned expansions in tourism products⁸ in South Bruce that business owners or developers have shared publicly. The proposed Centre of Expertise represents the only local tourism project being discussed at present in a public forum.
- Hotel developments are being pursued in other parts of Bruce County close to waterfront (e.g., Port Elgin, Sauble Beach, Wiarton).
- Unique, authentic experiences in South Bruce with more potential to attract tourists include Sea Buckthorn Golden Orchard, Essentially Lavender, and Hoity Toity Cellars.

Destination Marketing Organizations

- The Municipality of South Bruce's tourism website provides a strong representation of the community's tourism assets. Opportunities exist to expand this website functionality to increase its utility for potential tourists.
- Bruce County via the "Explore the Bruce" portal represents an important regional tourism partner for South Bruce. South Bruce currently receives some promotion from the County, but substantial opportunities exist to expand these services.
- The provincially mandated Regional Tourism Organization 7 (RTO7), covering Bruce, Grey, and Simcoe Counties, is an excellent resource for the tourism businesses of South Bruce. More could be done to build the relationship between the Municipality of South Bruce and RTO7.
- Future local tourism development requires dedicated funding and staff resources.

⁷ Recreation Master Plan, Initial Findings Report, Tract Consulting, January 2022

⁸ A Tourism Product is "a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life cycle." – World Tourism Organization, unwto.org

2.3 Tourism Assets

Business Counts

Figure 1 presents the numbers of businesses in South Bruce for the tourism sector, as reported by Emsi Economic Modelling, in December 2021. Only five businesses reported employees. There was a total of 13 businesses: three in Accommodation, two in Recreation and Entertainment, one in travel services, one in Transportation, and six in Food and Beverage Services.

While the total of tourism businesses grew from six in December 2020, with the most significant growth experienced in Food and Beverage Services, this change likely reflects a reopening of businesses after the COVID-19 pandemic. Since December 2016, the number of businesses related to tourism in South Bruce shrank by seven, from a total of 20.

These numbers confirm previous findings that South Bruce does not have a strong tourism sector or a significant offering of services and activities to draw visitors.

Figure 1: South Bruce Tourism Industry, Statistics Canada Business Counts, December 2021

| Sector | Total | Without Employees | With Employees | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-199 | 200-499 | 500 + |
|----------------------|-----------|-------------------|----------------|----------|----------|----------|----------|----------|----------|----------|----------|
| Total | 13 | 8 | 5 | 0 | 0 | 1 | 1 | 1 | 0 | 0 | 0 |
| Accommodation | 3 | 2 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Food & Beverage | 6 | 2 | 4 | 1 | 1 | 0 | 1 | 1 | 0 | 0 | 0 |
| Rec. & Entertainment | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Transportation | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Travel Services | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Jobs

The number of jobs assessed by Emsi for tourism in South Bruce is a total of 30 for 2021 (Figure 2), the majority of which are related to Food and Beverage. After a decline in 2020, this subsector started to show growth in 2021, and jobs are projected to increase by about 10% by 2025. These businesses also serve residents, which supports recovery of the subsector. Other sectors like Travel Services, Transportation, Recreation and Entertainment, and Accommodation have shown no employment growth since 2016 and the trend is expected to continue for the next four years. As the count of jobs in these subsectors is less than ten, they are not included in the total estimation for the tourism sector.

Figure 2: South Bruce Tourism Industry Jobs, Emsi, 2016-2025

| Sector | 2016 Jobs | 2020 Jobs | 2021 Jobs | 2025 Jobs | 2016-2020 Change | 2021-2025 Change |
|----------------------|-----------|-----------|-----------|-----------|------------------|------------------|
| Total | 55 | 28 | 30 | 34 | -16 | 5 |
| Accommodation | <10 | <10 | <10 | <10 | * | * |
| Food & Beverage | 45 | 28 | 30 | 34 | -16 | 5 |
| Rec. & Entertainment | <10 | <10 | <10 | <10 | * | * |
| Transportation | 10 | <10 | <10 | <10 | * | * |
| Travel Services | <10 | <10 | <10 | <10 | * | * |

* Insufficient Data

Local Tourism Asset Analysis

To better gauge local tourism development potential, a review of South Bruce’s tourism assets was conducted. The analysis is founded on the Ritchie-Crouch Model of Destination Competitiveness,⁹ whereby major assets or core attractors motivate a tourist to choose one destination over another.

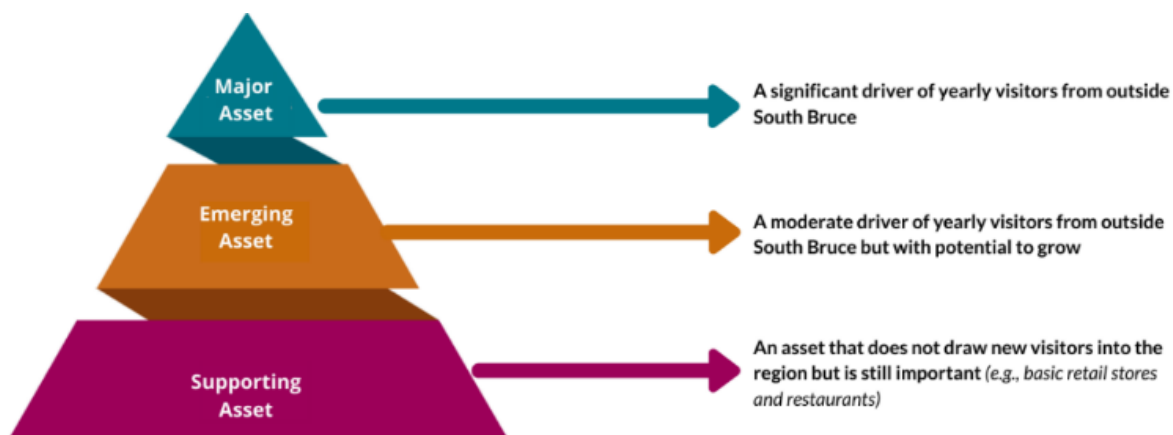
Reminder: Tourism assets attract visitors from outside South Bruce. Locations that are popular among locals primarily are not tourism assets but perhaps excellent recreational amenities.

The analysis of South Bruce tourism assets considered a range of attributes including:

- Google and Trip Advisor reviews and ratings (Increasing online presence is essential to attract visitors as their experiences start before arriving at the destination and platforms like TripAdvisor and Google provide a channel to display South Bruce’s tourism offerings.)
- Online visibility
- Potential for future tourism development

Based on the criteria, local tourism assets were divided into categories as highlighted in Figure 3 below.

Figure 3: Asset Analysis Criteria



- **Major Assets:** Within Bruce County, there are several major tourism assets, including Sauble Beach and Tobermory, which drive significant volumes of visitors to the region on an annual basis. There are no similar major tourism assets in the Municipality of South Bruce currently.
- **Emerging Assets:** Figure 4 displays South Bruce’s five primary emerging assets. Only three emerging assets have a satisfactory online presence:¹⁰ Hoity Toity Cellars, Studio 410, and Essentially Lavender. Sea Buckthorn Golden Orchard and Healing Arc appear as two separate attractions on social media, even though they are the same property. The remaining potential emerging assets possess an online presence through their website or through a Facebook page. Facebook¹¹ has the highest share of social media usage in Canada and is a common tool for businesses, but it has restrictions as some visitors may not use Facebook and therefore may not

⁹ See detailed discussion about core attractors in Section 4, “Addressing Changes in Demand.”

¹⁰ Satisfactory online presence in this analysis includes a website, listings on TripAdvisor and Google, as well as updated hours, contact information, and links on Google.

¹¹ Facebook utilization is included, due to its top ranking in terms of social media usage. Source: [Statista, 2022](#).

have access to business information. There are many potential emerging assets that could benefit from more tourism product development.

- **Supporting Assets:** There were 11 supporting assets identified in South Bruce, almost all having a satisfactory online presence. Events such as fall fairs, Belmore Maple Syrup Festival, or Stout 'n Kraut Bavarian Street Fest have the potential to be supporting assets for tourists.

Figure 4: South Bruce Tourism Asset List / Visitor Perception Analysis

| Asset | Google Rating | Google Reviews | TripAdvisor Rating | TripAdvisor Reviews | Website | Google Hours | Google Link | Google Contacts |
|--|---------------|----------------|--------------------|---------------------|------------------|--------------|-------------|-----------------|
| EMERGING ASSETS | | | | | | | | |
| Studio 410 | 5.0 | 2 | 4.0 | 1 | Yes | Yes | Yes | Yes |
| Hoity Toity Cellars | 4.8 | 49 | 4.5 | 16 | Yes | Yes | Yes | Yes |
| Essentially Lavender | 4.7 | 18 | | | Yes | No | Yes | Yes |
| Sea Buckthorn / The Healing Arc ¹² | 5.0 † | 6 † | 5.0 ‡ | 5 ‡ | * | * | * | * |
| Carrick Tract Trail System | 4.7 | 61 | | | Yes | No | No | No |
| POTENTIAL EMERGING ASSETS | | | | | | | | |
| Belmore Maple Syrup Festival | | | | | Yes | No | No | No |
| Bruce Rail Trail | 3.5 | 12 | | | Yes | No | No | No |
| Formosa Springs Brewery (Closed) | 4.4 | 17 | 4.5 | 3 | FB ¹³ | No | No | Yes |
| Cycling Routes | | | | | Yes | No | No | No |
| Downtown Mildmay | | | | | No | No | No | No |
| Downtown Teeswater | | | | | No | No | No | No |
| Saugeen Conservation Area | | | | | Yes | No | No | No |
| South Bruce Barn Quilt Tour | | | | | Yes | No | No | Yes |
| South Bruce Vintage Tractor Tour ¹⁴ | | | | | No | No | No | No |
| Stout 'n Kraut Bavarian Street Festival | | | | | FB | No | No | No |
| SUPPORTING ASSETS | | | | | | | | |
| Mildmay Cheese Haus | 4.7 | 107 | | | Yes | Yes | Yes | Yes |
| Wendt's Jewellery | 4.7 | 69 | | | Yes | Yes | No | Yes |
| Gay Lea Teeswater Country Store | 4.6 | 25 | | | Yes | Yes | No | Yes |
| Hometown Pizza | 4.6 | 68 | 4.0 | 1 | No | Yes | No | Yes |
| Harley's Pub and Perk | 4.4 | 337 | 4.0 | 42 | Yes | Yes | Yes | Yes |
| Huron Bay Coop / Ace Country & Garden | 4.4 | 18 | | | Yes | Yes | No | Yes |
| M&R Burger Box / Sandy's Restaurant | 4.3 ¶ | 243 ¶ | 3.5 ¶ | 50 ¶ | No | Yes | No | Yes |
| Lighthouse Motel | 4.3 | 94 | | | Yes | No | Yes | Yes |
| Brucehaven Campground | 4.1 | 11 | | | No | No | No | Yes |
| Boomer's Cosy Restaurant | 3.9 | 39 | 4.0 | 6 | Yes | Yes | Yes | Yes |

Source: Internal Sources, TripAdvisor, Google Ratings. † = Rating for Sea Buckthorn; ‡ = Rating for The Healing Arc; *Varies depending on listing. ¶ = Ratings are taken from Google and Trip Advisor for Sandy's Family Restaurant. M&R Burger Box has Google ratings / reviews, but no presence on TripAdvisor. Note: Businesses that have closed (e.g., Formosa Springs Brewery, Vintage Café) still appear on Google and TripAdvisor but have been deleted from this analysis.

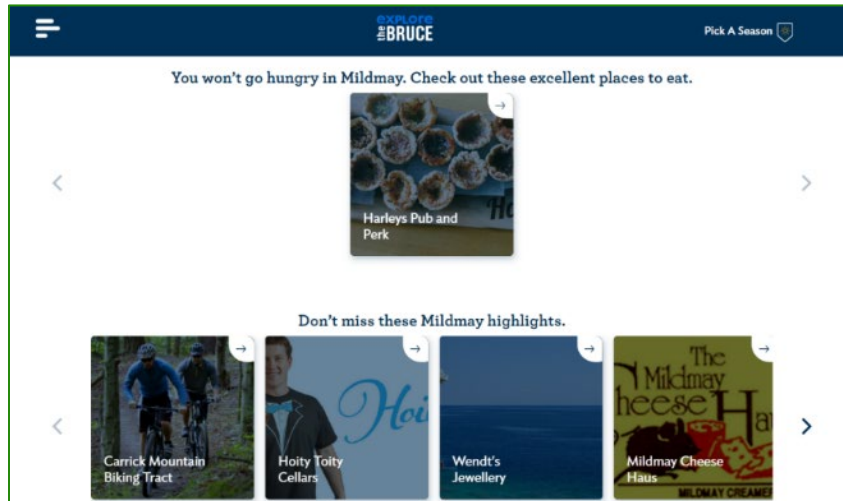
¹² Sea Buckthorn Golden Orchard and The Healing Arc are the same business. Visitors rated them separately. Scores have been combined for this exercise.

¹³ No website, but asset has a Facebook page

¹⁴ Part of South Bruce Tourism

Figure 5 outlines some of the top attractions within South Bruce, specifically Mildmay, sourced from Bruce County’s Explorethebruce.com website. Several additional assets within the Municipality should be considered as part of a future asset analysis by Bruce County, to be added to its tourism website, such as Essentially Lavender and Sea Buckthorn Golden Orchard.

Figure 5: South Bruce Tourism Assets, according to Bruce County

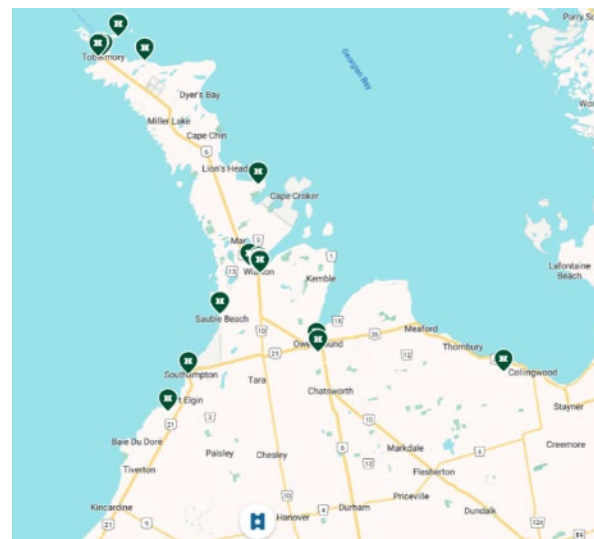


Regional Tourism Asset Analysis

Figure 6 displays the main tourist attractions in Bruce, Grey, and Huron Counties, according to TripAdvisor mapping,¹⁵ with Hoity Toity Cellars in South Bruce marked in blue as one of few regional tourism assets located inland. These key regional tourism assets include:

- MacGregor Point Provincial Park, Port Elgin
- Sauble Beach
- Fathom Five National Park, Tobermory
- Flowerpot Island, near Tobermory
- Chi-Cheemaun Ferry Terminal, Tobermory
- The Grotto, Bruce Peninsula National Park, near Tobermory
- Inglis Falls, Owen Sound
- Blue Mountain Ski Resort, Blue Mountains

Figure 6: Regional Tourism Asset Analysis



¹⁵ Trip Advisor, [tripadvisor.ca](https://www.tripadvisor.ca)

The Bruce Power Visitors' Centre (Figure 7) offers displays on the nuclear electricity process, Cobalt-60 and medical isotopes, and how air, water and food around the site are monitored.¹⁶ In 2019, 19,000 people visited the Bruce Power Visitors' Centre. Visitors can also participate in the Summer Bus Tour Program, which takes participants around the site. Google reviewers give the facility 4.5 stars (170 reviews). TripAdvisor: 4.5 bullets (32 reviews). Selected comments: "Wouldn't drive hundreds of kms out of my way to stop here but if it's on your way definitely worth a look." ... "If you live nearby this is a no brainer, however you will have to manage expectations if coming from further."

Figure 7: Bruce Power Visitor Centre



The mission of the Walkerton Clean Water Centre¹⁷ (Figure 8) is to educate and support water professionals as they manage their water systems to safeguard water resources. The centre features a technology demonstration facility, three training classrooms, laboratory, and boardroom. The Centre encourages people to schedule a visit to the facility and take either a non-technical or technical tour. Participants receive a presentation outlining the Centre and its services, and a brief tour including pilot plant and laboratory. In 2018-19, the Centre provided technical tours to 992 individuals, of which some 600 were education sessions for school-age children for World Water Day.¹⁸ Google rating: 5 stars (4 reviews). The centre has no presence on TripAdvisor.

Figure 8: Walkerton Clean Water Centre



To the south and east, inland core attractors include Stratford Festival (attendance of 502,605¹⁹ in 2018), Casino Rama Resort (ranked among top five casinos²⁰ in Canada), and Canada's Wonderland (3.95 million visitors²¹ in 2019).

Core attractors near South Bruce represent opportunities for the municipality to target drivers passing through and coming from cities like London, Kitchener-Waterloo, and Toronto. According to Bruce County, 46% of visitors stayed six or more nights in the region.²² The next largest group was 17% of visitors who stayed three nights. Similar data is not available for South Bruce specifically. By analyzing the nature of travel corridors, there may be ways to draw tourists off their planned path, and divert them to activities, services, accommodation, and dining experiences in South Bruce. This is particularly possible if visitors are spending six or more nights in Bruce County.

¹⁶ Bruce Power Annual Report 2021, brucepower.com

¹⁷ Walkerton Clean Water Centre website, wcwc.ca

¹⁸ Walkerton Clean Water Centre 2018-19 Annual Report, wcwc.ca

¹⁹ Stratford Festival article, Toronto Star, March 2019, thestar.com

²⁰ World Casino Directory, worldcasinodirectory.com

²¹ Themed Entertainment Association Report, 2019, teaconnect.org

²² Explore the Bruce, Economic Impact of Tourism 2019, brucecounty.on.ca

Travel Corridor Analysis

Travel corridors between major destinations in Southern Ontario were analyzed to determine if the Municipality of South Bruce can leverage tourists who are planning trips or moving between one major destination and another. Start and stop nodes were entered into Google Maps, approximating the action a tourist would take when planning their trip.

Figure 9: Routes between London and Tobermory

South Bruce is well positioned on the following routes, where tourists are most likely to pass through Teeswater, Mildmay, or Formosa when travelling between these major nodes:

- London and Tobermory (Figure 9)
- Kitchener and Sauble Beach
- Hamilton and Sauble Beach
- Stratford and Sauble Beach

There are several other routes between major tourism nodes that will require intervention (e.g., promotion, wayfinding signage, etc.) to divert tourists off the established routes and into South Bruce.

- London and Blue Mountains
- Kitchener and Tobermory
- Hamilton and Tobermory
- Stratford and Tobermory
- Niagara Falls and Tobermory or Sauble Beach
- Windsor and Tobermory or Blue Mountains
- Guelph and Tobermory or Sauble Beach
- Casino Rama and Bayfield

There are no travel corridors between Toronto and other key tourism nodes that take tourists through South Bruce.

A full analysis of corridors connecting major tourist destinations in Southern Ontario is detailed in Figure 10, next page.

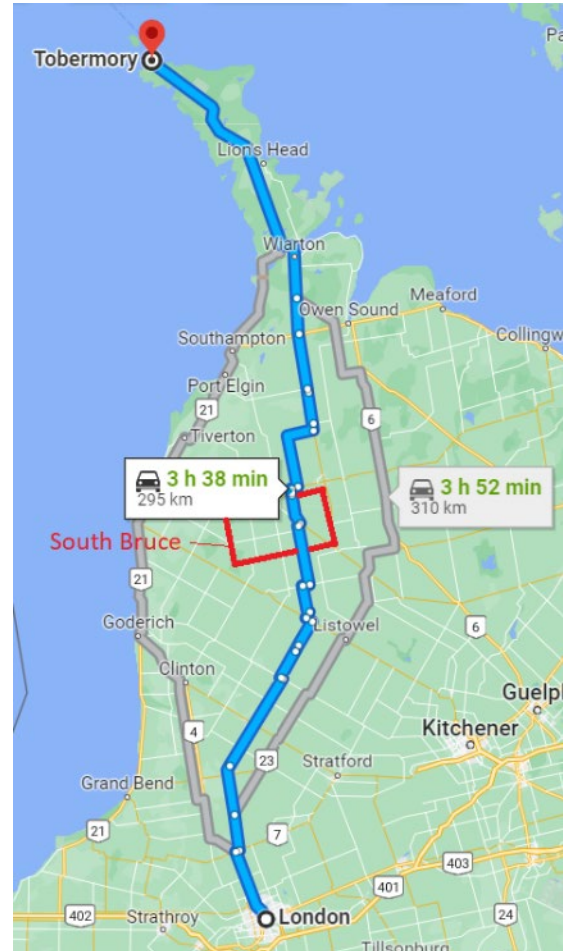


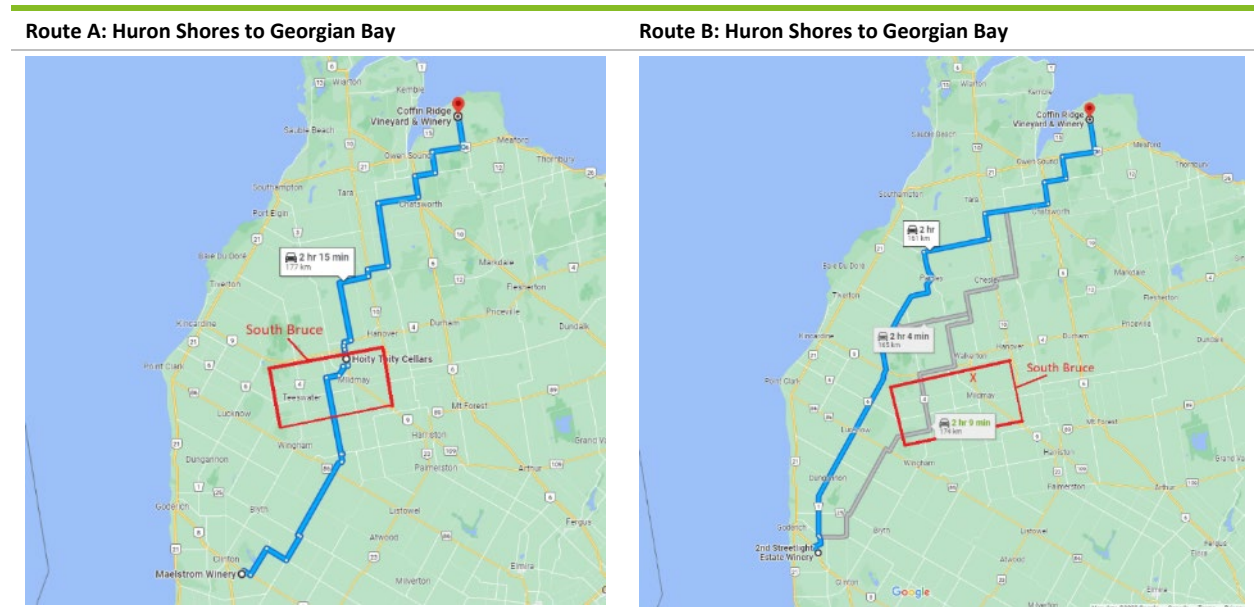
Figure 10: Travel Corridor Analysis

| Major Tourism Node - Start | Major Tourism Node - Stop | Potential Impact on South Bruce (Good / Fair / Poor) | Does main route pass through South Bruce? (Yes/No) | Length of Main Route (hr/min) | Is there an alternate route that passes through South Bruce? (Yes/No) | Length of Alternate Route (hr/min) | Extra mins from alternatives without going through SB |
|----------------------------|---------------------------|--|--|-------------------------------|---|------------------------------------|---|
| London to: | Tobermory | Good | Yes | 3 hr 38 | No | - | |
| | Blue Mountains | Fair | No | 2 hr 49 | Yes* | 3 hr 4 | 8 |
| | Muskoka | Poor | No | 3 hr 47 | No | - | |
| | Casino Rama | Poor | Yes | 3 hr 7 | No | - | |
| Kitchener to: | Tobermory | Fair | No | 3 hr 8 | Yes* | 3 hr 19 | 12 |
| | Sauble Beach | Good | Yes | 2hr 15 | Yes | 2hr 18 | |
| | Blue Mountains | Poor | No | 1 hr 55 | No | - | |
| | Muskoka | Poor | No | 2 hr 57 | No | - | |
| | Bayfield | Poor | No | 1 hr 26 | No | - | |
| Hamilton to: | Grand Bend | Poor | No | 2 hr 11 | No | - | |
| | Sauble Beach | Good | Yes | 2 hr 47 | No | - | |
| | Tobermory | Fair | No | 3hr 43 | Yes * | 3 hr 56 | 7 |
| | Bayfield | Poor | No | 2 hr 12 | No | - | |
| Stratford to: | Sauble Beach | Good | Yes | 2 hr 13 | Yes | 2 hr 13 | |
| | Tobermory | Fair | No | 3 hr 6 | Yes | 3 hr 11 | |
| | Blue Mountains | Poor | No | 2 hr 5 | No | - | |
| Niagara Falls to: | Blue Mountains | Poor | No | 2 hr 56 | No | - | |
| | Grand Bend | Poor | No | 2 Hr 50 | No | - | |
| | Sauble Beach | Fair | No | 3 hr 26 | Yes* | 3 hr 35 | 1 |
| | Tobermory | Fair | No | 4 hr 18 | Yes* | 4 hr 36 | 13 |
| | Bayfield | Poor | No | 2 hr 52 | No | - | |
| Windsor to: | Tobermory | Fair | No | 5 hr 40 | Yes | 5 hr 45 | |
| | Sauble Beach | Poor | No | 4 hr 19 | No | - | |
| | Blue Mountains | Fair | No | 4 hr 45 | Yes* | 5 hr 15 | 10 |
| | Muskoka | Poor | No | 5 hr 24 | No | - | |
| | Casino Rama | Poor | No | 4 hr 46 | No | - | |
| Guelph to: | Tobermory | Fair | No | 3 hr 1 | Yes* | 3 hr 16 | 8 |
| | Sauble Beach | Fair | No | 2 hr 8 | Yes | 2 hr 11 | |
| | Blue Mountains | Poor | No | 1 hr 45 | No | - | |
| | Muskoka | Poor | No | 2 hr 50 | No | - | |
| | Bayfield | Poor | No | 1 hr 48 | No | - | |
| Casino Rama to: | Grand Bend | Poor | No | 3 hr 35 | No | - | |
| | Stratford | Poor | No | 2 hr 43 | No | - | |
| | Bayfield | Fair | No | 3 hr 23 | Yes* | 3 hr 29 | 2 |
| Toronto to: | Tobermory | Poor | No | 3hr 41 | No | - | |
| | Sauble Beach | Poor | No | 2 hr 38 | No | - | |
| | Stratford | Poor | No | 1 hr 36 | No | - | |
| | Grand Bend | Poor | No | 2 hr 30 | No | - | |
| | Bayfield | Poor | No | 2 hr 30 | No | - | |

Connections to Wineries

South Bruce has one winery, Hoity Toity Cellars, which is equidistant to two emerging wine regions:²³ Huron Shores (6 wineries) and Georgian Bay (3 wineries). It is a one-hour drive from Maelstrom Winery near Clinton to Hoity Toity Cellars, and a slightly longer drive to Coffin Ridge Vineyard & Winery near Owen Sound (see Figure 11, Route A). Google Maps does offer an optional route that takes tourists through South Bruce, although not directly past Hoity Toity. The main route from 2nd Streetlight Estate Winery near Goderich to Coffin Ridge bypasses South Bruce entirely (see Figure 11, Route B). In either case, a tourist would need to be informed about Hoity Toity Cellars and make an intentional decision to go slightly out of their way to visit the South Bruce winery.

Figure 11: Connecting South Bruce to Emerging Wine Regions



Source: Google Maps.
Red X on Route B is approximate location of Hoity Toity Cellars.

Destination Marketing Organizations

South Bruce is located northwest of the Greater Toronto Area (GTA) in the south-eastern corner of Bruce County. The municipality’s two main population centres include Mildmay and Teeswater. The municipality is part of the greater “BruceGreySimcoe” Counties tourism brand. Tourism within South Bruce is promoted primarily via three entities or Destination Marketing Organizations (DMOs):

Visitsouthbruce.ca (Municipality of South Bruce)

This tourism website, “visitsouthbruce.ca” is managed by the Municipality of South Bruce separately from its corporate municipal website, a very positive approach compared to other communities that combine the two. The tourism website features things to do, tastes, events, and other information. The tagline of the municipality tourism website is “where family fun begins!”. Some opportunities to improve functionality of the website include a

²³ Wine regions defined by the Wine Council of Ontario, winecountryontario.ca

map of tourism assets, half/full day itinerary trips, and more photos and video to highlight South Bruce attractions. South Bruce also has its own "South Bruce Tourism" facebook page, separate from its corporate social media feeds, another positive feature.

Through its Community Improvement Plan, the Municipality of South Bruce offers façade improvement grants to help vitalize our downtown core. South Bruce also provides the Building Better Futures Grant for South Bruce Service groups and organizations to implement new programs and invest in infrastructure, which can benefit the tourism industry.

ExploretheBruce.com (Bruce County)

Bruce County is mandated to promote and support tourism development across all lower-tier municipalities (including South Bruce). It operates the "explorethebruce.com" website separately from its corporate municipal website. The tagline "Explore the Bruce" represents Bruce County's official tourism branding for the region. The only Bruce County community / place in South Bruce promoted on the website was Mildmay.²⁴ Several tourism-related activities promoted within the South Bruce area on the ExploretheBruce website included:

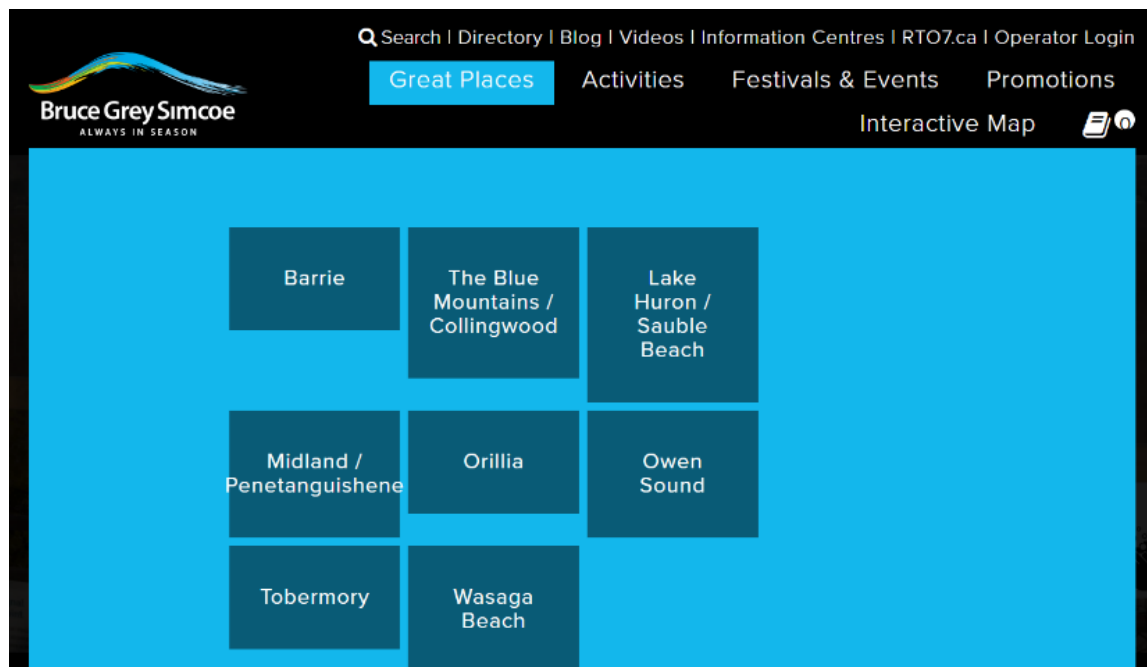
- Motorcycle Tour: The Farmlander – Harley's Pub & Perk
- Discover Bruce County's breweries and wineries – Hoity Toity Cellars
- Fat Biking via the Carrick Mountain Biking Tract
- Snowmobiling along the Bruce County Rail Trail
- Amazing gardens of the interior - Essentially Lavender, Sunny Nook Greenhouse and Produce
- Mildmay Cheese Haus
- Gay Lea Teeswater Country Store
- Formosa Mother's Day Breakfast
- Ruetz Farm Fresh Produce

Regional Tourism Organization (RTO) 7

This provincially mandated organization (one of 13 RTOs across the province) provides strategic and collaborative leadership to build, sustain, and grow tourism in "BruceGreySimcoe." The organization provides strategic funding for tourism operators throughout the region including event funding, COVID-19 support, operator training, experience implementation programming, and more. RTO 7's website does not provide a link to the Municipality of South Bruce's tourism website, nor does it include Bruce County among its "Great Places" (see Figure 12).

²⁴ Explore the Bruce – Places – Communities, explorethebruce.com/places/communities

Figure 12: RTO7 website



Unique Features that Could Benefit from Additional Tourism

Unique, authentic experiences in a community have much more potential to attract tourists than typical experiences that every rural community has (e.g., trails, farmers market, conservation area, quaint downtown area, roadside produce stands). In South Bruce, unique experiences include Sea Buckthorn Golden Orchard, Essentially Lavender, Hoity Toity Cellars, and community events.

- **Essentially Lavender²⁵** is a lavender farm and boutique featuring gardens, tours, and small-batch lavender products. The lavender farm features a labyrinth, apiary, xeriscape garden, and seating areas. The farm also offers three bunkies for tourist accommodation where visitors can relax, enjoy the gardens and trails, access the Teeswater River for fishing, canoeing and kayaking. They can also stargaze and enjoy an evening fire. Location: 1379 Concession 10, Teeswater.
- **Hoity Toity Cellars²⁶** is an eco-friendly farm boutique winery and cidery making small batches of artisan wines and craft ciders from Bruce County cold-climate grapes and apples, grown right on the farm. Their Saloon offers tastings. Hoity Toity Cellars has won awards from the All Canadian Wine Championships and the Great Lakes International Cider & Perry Competition. Location: 1723 Hwy 9, Mildmay.
- **Sea Buckthorn Golden Orchard²⁷** is Ontario's first and largest fruit producing Sea Buckthorn orchard. The owner has worked on several agricultural research projects in the quest for plants that can be grown on marginal land in Ontario and can be used in the functional food and nutraceutical industry. The orchard has trees laden with orange fruit from late July until early October. The berries have a tart citrus flavour. Location: 166 Sideroad 25 South, Teeswater.

²⁵ Essentially Lavender website, essentiallylavender.ca

²⁶ Hoity Toity Cellars website, hoitytoitycellars.ca

²⁷ Sea Buckthorn Golden Orchard Facebook Page, facebook.com/seabuckthorgoldenorchard

- **Community Events:** There are several community events in South Bruce that complement the tourism industry and could be enhanced to attract more visitors from outside of the region. Events such as the Formosa Country Christmas²⁸ drew 9,000 visitors. The Belmore Maple Syrup Festival²⁹ has also been popular, and the Mildmay Hanging of the Green³⁰ attracted more than 500 people in one night. The Stout n' Kraut Street Festival³¹ has similar attendance. Annual fall fairs in Teeswater³² and Mildmay³³ also have high attendance.³⁴

The creation and implementation of a detailed tourism product development and marketing plan would assist these South Bruce businesses and others to prepare for the impacts of the NWMO Project. A gap analysis of the local tourism industry should be included in the next steps, to determine which types of businesses to nurture within or attract to South Bruce.

Planned Expansions that Contribute to Tourism

There are currently no major tourism expansions planned in the Municipality of South Bruce that business owners or developers have shared. Elsewhere in Bruce County, a number of projects are underway, and are being discussed in public.

Port Elgin

Kingslake Project Inc. has received planning permission from the Town of Saugeen Shores for phased development of a five-storey, 85-room hotel, and a future restaurant with commercial space at the south end of Port Elgin.³⁵ An opening date is not available as the project continues its way through the regulatory process.

Sauble Beach

In December 2021, the Municipality of South Bruce Peninsula approved a zoning change for a plan by Maison Canada Design & Build to build a \$6.5-million four-storey luxury hotel with 21 rooms and ground-floor restaurant.³⁶ In April 2022, the municipality approved a site plan control agreement. When building and septic permits are approved, construction is expected to take 16 months.³⁷

Warton

A market feasibility study³⁸ conducted by RevPar International for the Municipality of South Bruce Peninsula has confirmed the market would support an upscale, full-service hotel. The study recommended an 80-unit resort-style hotel be built in Bluewater Park alongside Colpoys Bay and have 5,000 square feet of meeting space with a 3,000-square-foot ballroom, which could be divided into smaller rooms. The proposed opening date for the hotel is mid-to-late 2023 or early 2024.

²⁸ Formosa Country Christmas, formosacountrychristmas.ca

²⁹ Belmore Maple Syrup Festival, belmorecommunitycentre.ca

³⁰ Mildmay Chamber of Commerce Facebook page, facebook.com

³¹ Stout 'n Kraut Bavarian Street Festival, facebook.com

³² Teeswater Agricultural Society, facebook.com

³³ Mildmay Agricultural Society, facebook.com

³⁴ Source on attendance figures: Municipality of South Bruce

³⁵ Shoreline Beacon, March 2022, shorelinebeacon.com

³⁶ Owen Sound Sun Times, December 2021, owensoundsuntimes.com

³⁷ Ibid, April 2022, owensoundsuntimes.com

³⁸ REVPAR International, November 2021, southbrucepeninsula.com

3. Potential Changes in Demand

The purpose of this section is to review current and anticipated tourism trends and their potential impact on the tourism sector of South Bruce, Bruce County, and the surrounding region (Bruce / Grey / Simcoe). The section also explores potential changes in tourism demand with the development of the NWMO project.

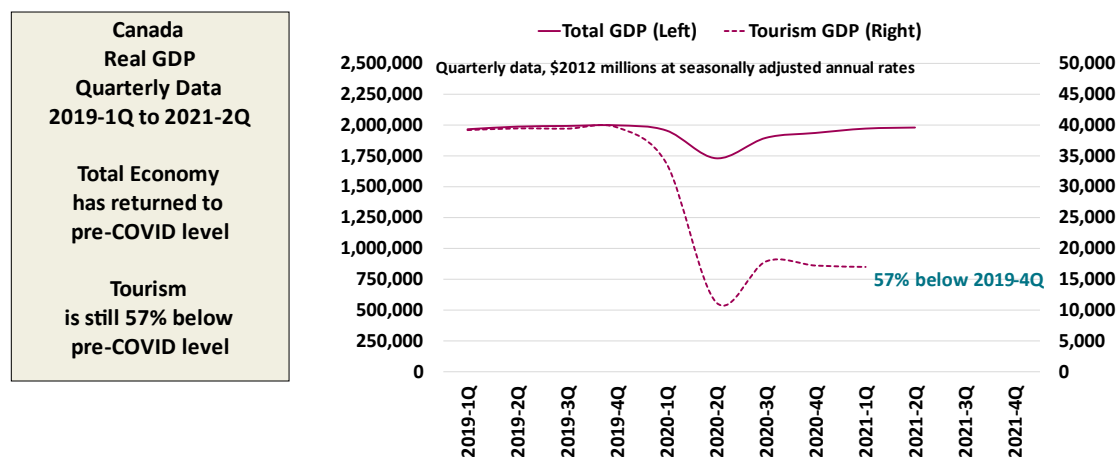
3.1 Tourism Industry Trends

Key Findings

- Despite relaxation of COVID-19 restrictions during the latter part of 2021, most operators lost two seasons' worth of revenue and have high debt levels. Future tourism growth will take time and will require ongoing financial, marketing, and operations support.
- National data on the uptake of federal financial assistance programs (Figure 13) indicates that tourism businesses demonstrated the highest need for support. Future tourism funding will require additional operator and local municipal support to generate tourism demand.
- Labour shortages are expected to continue to plague tourism businesses over the coming years. When planning future tourism investments within South Bruce, consideration must be given to ensure affordable housing for tourism workers.
- Opportunities exist to explore worker sharing agreements between larger tourism operators or regions that provide workers with expedited or guaranteed employment.
- The pandemic has highlighted long-term structural challenges associated with the tourism sector, such as poor public transportation networks, highly concentrated demand in summer periods, and uncompetitive workforce compensation.
- Immigration and temporary foreign workers remain a critical source of unskilled labour for tourism operators. South Bruce could collaborate with Bruce County on a tourism worker attraction strategy. Worker incentives (e.g., financial, perks) could attract labour.
- Regional collaboration must occur to create a long-term, sustainable tourism sector.

Impact of COVID-19

There is no question that the ongoing COVID-19 pandemic has disproportionately impacted the global tourism sector compared to other industries. Since March 2020, operators globally have faced the brunt of government-imposed lockdown restrictions; an ever-changing regulatory environment that has limited operation capabilities; drastic reductions in international visitation; and significant financial pressures. As illustrated in Figure 13 (next page), in the fourth quarter of 2021, Canada's real tourism GDP was still 57% below pre-COVID-19 levels.

Figure 13: Quarterly GDP in the Canadian Tourism Industry during the COVID-19 Pandemic³⁹

Future Considerations

Looking forward, Destination Canada anticipates the pandemic will have a lasting impact on tourism across Canada. With the expected future waves of the pandemic, vaccinations will lose effect, causing fewer people to travel. Disruption at border crossings and airports will impact international visitor numbers. Broad research on visitor sentiments and preferences indicates that destinations prioritizing strong health and hygiene measures will be considered more favourable. Canada benefits from having a comparatively high vaccination rate compared to other global destinations, which will aid in international visitor attraction efforts.⁴⁰

Examples of Government Support during Periods of Crisis

In the summer of 2022, Canadians were expected to embrace freedom from mask mandates and travel restrictions. However, the effects of COVID-19 on the tourism industry are expected to continue and challenges for businesses may return. During and immediately after the height of the pandemic, federal, provincial, and municipal governments enacted various financial support schemes to prevent business closures and support job seekers. These examples represent the types of support and incentives that may be put in place when small businesses need help during a crisis. They serve as potential conversation points when considering how to induce commercial enterprises to weather economic uncertainty, or to remain resilient during local economic crises.

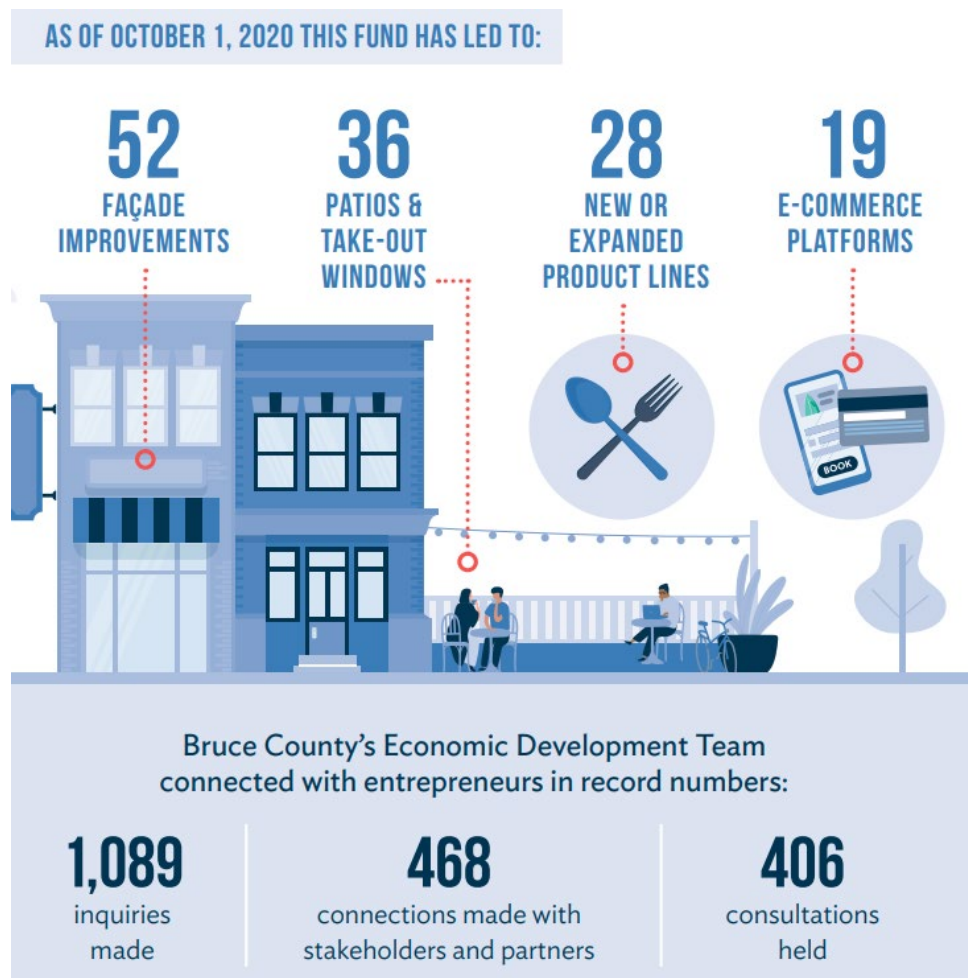
- Bruce County, Support the Bruce: Business Sustainability Fund (2020-21) –** Introduced in May 2020, the program allocated \$1.75 million in grants and loans to allow businesses to 'pivot, adapt, enhance, and reimagine their businesses'.⁴¹ By October 2020, over \$1.3 million had been directed to 383 local business owners (see Figure 14, next page). The program sparked a record number of interactions with the local business community and allowed Bruce County to support local operators quickly. Bruce County has ended its Sustainability Fund, but its Spruce the Bruce grants program continues to operate.

³⁹ Statistics Canada, 2012 Income and Expenditure Accounts Technical Series, statcan.gc.ca

⁴⁰ Destination Canada, Tourism's Big Shift, November 2021

⁴¹ Bruce County, "Faces of Resilience: Showcasing the Support the Bruce: Business Sustainability Fund", May 2020

Figure 14: Support the Bruce: Business Sustainability Fund Grant/Loan Impact



Other local COVID-19 responses included:

- **COVID-19 Tourism Response Fund** – The Federal Economic Development Agency for Southern Ontario (FedDev), through Community Futures offices, provided \$250,000 to eligible Bruce County tourism businesses in the form of one-time, non-repayable grants of \$2,500 to \$10,000. Applications closed in October 2020.
- **Bruce Power Strength in Numbers Initiative** - Supported sourcing Personal Protective Equipment (PPE) supplies. ⁴² The online order portal was closed, as of July 2022.
- **GreyBruceHuron Strong App** – The app, which was developed with the Bruce Power Nuclear Innovation Institute (NII),⁴³ helped inform residents during the pandemic. The app remained active as of July 2022.
- **Municipality of South Bruce** – In addition to regular communication, the Municipality had a centralized landing page on COVID-19 resources with links to community

⁴² Bruce Power, [Strength in Numbers Initiative](#), 2021

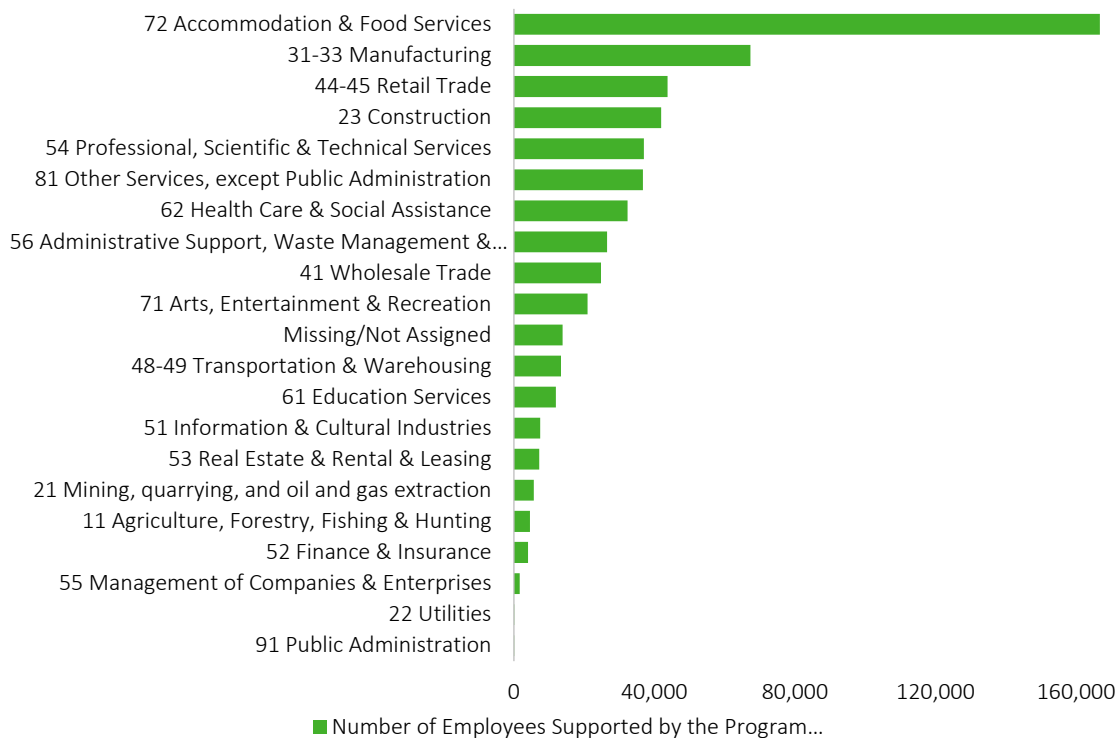
⁴³ Grey Bruce Huron County, [Strong](#), 2021

partners.⁴⁴ South Bruce offered a Personal Protection Equipment Grant during the pandemic for South Bruce businesses.

- **Digital Main Street Grants** - Supported main-street businesses achieve digital transformation.⁴⁵ The application portal is reported to remain open until October 31, 2022, or until the grant funds are exhausted.⁴⁶
- **Tourism Relief Fund (RTO7)** – In April 2022, RTO7 received \$7 million from the Government of Canada through the Federal Economic Development Agency for Southern Ontario to deliver the Tourism Relief Fund to tourism businesses in BruceGreySimcoe. Grants are being confirmed as of July 2022.

A variety of national and provincial financial supports were provided to operators. However, the most notable of these programs included the Canadian Emergency Wage Subsidy (CEWS), a 75% wage subsidy to eligible businesses impacted by the pandemic, which incentivized businesses to keep their employees on board. Figure 15 shows that the Accommodation and Food Services industry accounted for a substantial portion of the employees supported by the CEWS between November and December 2020.

Figure 15: Uptake of CEWS benefit by NAICS industry in Canada, November 22 to December 19, 2020



Source: Government of Canada⁴⁷

⁴⁴ As of July 2022, the page remained active on the municipal website.

⁴⁵ Digital Main St. "[Shop Here](#)", 2021

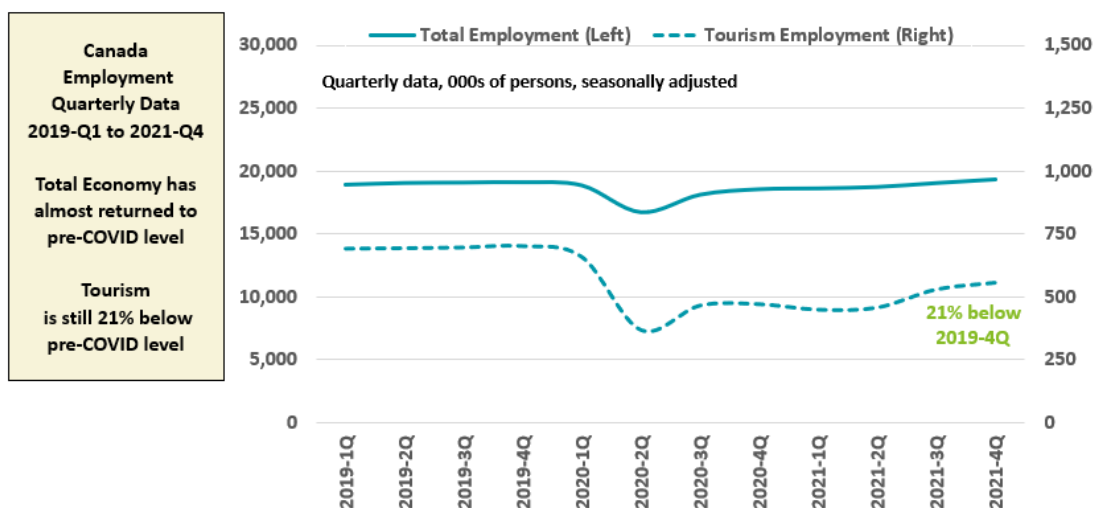
⁴⁶ Digital Transformation Grant, 2022, digitalmainstreet.ca

⁴⁷ Revenue Canada, canada.ca

Labour Shortages

The Canadian tourism sector is currently facing a significant labour shortage, alongside other industry sectors, as the ongoing effects of the pandemic take their toll. Increases in retirement, lack of employment opportunities during lockdown periods, poor working conditions and compensation packages, and lack of job security have compounded over the past two years to create an absence of workers. As is illustrated in Figure 16, as of 2021 Q4, quarterly employment in the Canadian tourism industry was still 36% below pre-pandemic levels. Lack of affordable housing options and accessible transportation routes to operators have further compounded worker shortages for rural destinations across South Bruce and Bruce County.

Figure 16: Quarterly Employment in the Canadian Tourism Industry during the COVID-19 Pandemic⁴⁸



According to the Southwestern Ontario Workforce Development Study (May 2022), labour availability for low wage jobs is a big problem, particularly in hospitality, tourism, manufacturing, healthcare, childcare, and agriculture. Local businesses find it difficult to hire and retain employees, according to the Municipality of South Bruce Local Hiring Effects Study and Strategy (May 2022). Tourism businesses, especially accommodation and food services, are often small businesses which compete directly for the same local and regional labour supply as a large company. Wages, benefits, and employment supports are often the determining factors as small businesses may not be able to compete with larger employers for the same.

Regional Collaboration

Destination Canada expects a shift in the capacity and role of Destination Marketing Organizations (DMOs) due to the pandemic's impacts. Funding for Destination Marketing Organizations is expected to decrease as revenue streams are linked to hotel and accommodation taxes. According to a 2020 survey by Destination Analysts, budgets for DMOs have fallen by nearly 60% on average in Canada.⁴⁹ Resources for DMOs can be maximized through regional collaboration.

⁴⁸ Statistics Canada, 2012 Income and Expenditure Accounts Technical Series, Canadian Tourism Satellite Account, statcan.gc.ca

⁴⁹ The Future of Tourism Funding, Destination Analyst, 2020

3.2 Consumer Behaviours and Motivations

Key Findings

- The local tourism industry has the potential to leapfrog past traditional, passive visitor encounters into the realm of monetized tourism experiences, by leveraging the food and drink of South Bruce and surrounding area.
- Experiential and sustainable tourism requires entrepreneurial leadership, support from local government, long-term funding strategies – while meeting the needs and concerns of locals.
- South Bruce could capitalize upon its proximity to popular travel routes within Bruce County and syphon road traffic into the community through increased marketing and product development.
- Higher costs of travel, particularly international travel, could be an opportunity for South Bruce to increase marketing and promotional activities towards domestic consumers. Families and individuals looking to save money on international travel will likely be more inclined to travel locally, with large, geographically close markets such as Toronto and the GTA as prime targets.

Trends Affecting Consumer Behaviours and Motivations

A recent report by Destination Canada⁵⁰ identified several additional industry trends anticipated to shape Canada's tourism sector moving forward. They included:

- **Lack of Access and Reduced Transport Connectivity** – The report suggests that the availability of air and ground transportation will be limited, posing barriers to connecting travellers with their destinations.
- **Higher Costs: Inflation and Gas Prices** – The research found that high consumer demand for travel as restrictions are lifted, coupled with reduced supply and capacity, as well as workforce-related constraints and increasing inflation and gas prices, are all fueling rising travel costs.
- **Reduced Business Travel & Events** – Virtual and hybrid event organization is slowing the return to in-person events. Research from Deloitte's Corporate Travel Survey forecasts that business travel will likely recover only to around 80% of pre-pandemic levels by 2024.⁵¹
- **Growth in Indigenous Tourism** – Before the pandemic, Indigenous tourism was one of Canada's fastest-growing tourism sectors. Research from the Indigenous Tourism Association of Canada and Indigenous Tourism Ontario shows greater interest in Indigenous experiences from international travellers, but domestic interest is growing. Consumer Behaviours and Motivations.

Experiential Tourism

Experiential tourism is a form of tourism in which people focus on experiencing a country, city, or place by actively and meaningfully engaging with its history, people, culture, food, and environment. Experiential tourism has been growing as a primary driver of visitor spending around the world for decades. Only within the past 15 years have tourism

⁵⁰ Destination Canada, [Top Drivers and Recovery Trends](#), 2021

⁵¹ How the pandemic is reshaping corporate travel, [Deloitte](#), 2021

developers in Ontario fully appreciated the magnitude of focusing on authentic experiences to attract visitors.

Experiential tourism involves the story of the place, the terroir of the landscape, and allows the visitor to learn and expand their personal horizons – through enrichment, enlightenment, stimulation, and engagement. Experiential tourism often involves the Instagram moment, when tourists capture an image of themselves participating in the place, in a way that brags to their followers that they are fully engaged in the experience.

Agritourism and Culinary Tourism

Agritourism helps farmers generate revenue from recreational or educational activities, such as tours of a working farm or pick-your-own produce⁵². Small and mid-size farms are increasingly exploring agritourism as a strategy to remain competitive. The United States Department of Agriculture promotes the philosophy that agritourism help revitalizes rural economies, educate the public about agriculture, and preserve agricultural heritage. Agritourism is also an attractive option because it provides more job opportunities for residents. Farm agritourism revenue in the U.S. more than tripled between 2002 and 2017, according to data from the Census of Agriculture, to \$950 million in revenue.

Moving beyond simple tours or corn mazes, farmers can build relationships with local chefs to develop culinary tourism. About 80% of travelers research food and drink options while traveling to a new destination, and over half of those travelers consider themselves *culinary travelers*.⁵³ They are willing to spend a premium on their meals to ensure they are sourced locally.

The tourism industry in South Bruce has the potential to leapfrog past traditional visits into the realm of monetized tourism experiences. By leveraging the food and drink of South Bruce, as well as the agritourism and outdoor experiences, entrepreneurs can begin to draw new audiences to the municipality.



⁵² USDA Economic Research Service, "[Agritourism allows farms to diversify](#)", November 2019.

⁵³ World Food Travel Association (WFTA)

3.3 Sustainable Tourism and Visitor Management

Key Findings

- As a developing destination, South Bruce is not currently impacted by surging visitor numbers at unsustainable levels. When planning for future tourism growth within the municipality, sustainability should be considered. This includes evaluating developments, events, and operator regulations with an environmental and social lens to ensure their compatibility.
- Surging demand for rural-based experiences, and reports of over-tourism within Bruce County and region, can also be viewed as an opportunity for South Bruce. South Bruce could funnel regional tourists locally by increasing product development and marketing and aligning promotional outreach during peak tourism seasons.
- NWMO has demonstrated a willingness to fund projects and initiatives in the community. Funding may be leveraged from NWMO and other sources to ensure long-term stability.

Sustainable Tourism

The University of Guelph Tourism Collaborative developed a series of innovative best practices to foster sustainable tourism in Ontario's rural communities⁵⁴. The effort produced a framework to develop sustainable tourism products that also meet the needs of existing residents: "Dynamic leadership, effective governance structures, long-term strategic planning, and long-term funding strategies are essential *inner-tier* ingredients that not only propel [sustainable tourism] development but also facilitate the constant advancement of rural economies. Entrepreneurial leadership is also important for creating a culture of innovation among tourism operators in rural communities."

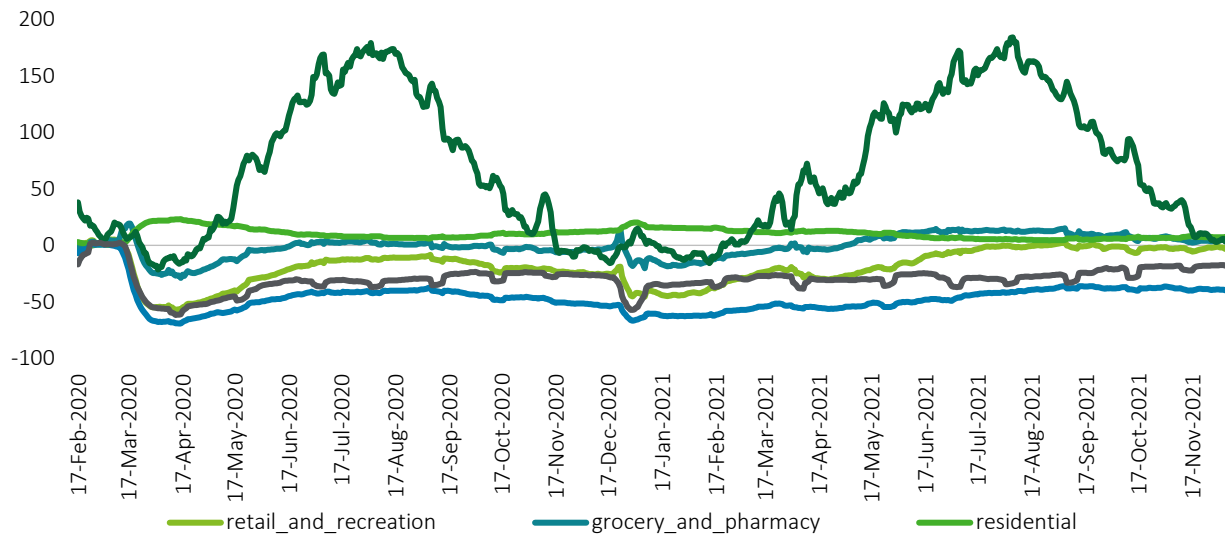
Mobility Trends

COVID-19 has reshaped consumer mobility patterns, directly impacting the tourism sector. Lockdowns and ongoing uncertainty about the health and safety of large gatherings have resulted in a strong increase in demand for outdoor experiences. Many tourism destinations and operators reported a surge in demand over the pandemic in campsites, hiking, beach, water-based activities, agricultural experiences, outdoor festivals, events and more.

Figure 17 (next page) uses the changes in locations among Google users across destinations in Canada to demonstrate an apparent surge in visits to parks (including local parks, national parks, public beaches, marinas, dog parks, plazas, and public gardens) over the summer of 2020 and 2021. In terms of food and beverage services, patrons (and often regulations) increasingly demanded outdoor patio seating, socially distanced tables, and physical barriers between themselves, staff, and other customers. Provincial governments quickly enacted legislation that allows municipalities to approve temporary outdoor patio licences for businesses. Many municipalities also amended zoning by-laws to reconfigured roadways and sidewalk space to accommodate increased pop-up patios.

⁵⁴ University of Guelph, [Tourism Collaborative](#), 2015

Figure 17: Google mobility for various activities in Canada, 2020/2021



Source: Google Mobility Data⁵⁵, Our World In Data⁵⁶

Visitor Management Strategies

The sudden loss of international visitors and surge in local demand due to the pandemic raised questions over the need to prioritize sustainable tourism practices. A high-level scan of news reports across the Bruce County area indicates that throughout 2020/21, some key tourism attractions have been overwhelmed by tourists. For example, Northern Bruce Peninsula reported an 'over tourism' surge that is 'overwhelming' municipal services such as by-law enforcement, parking, and public amenities (e.g., toilets).⁵⁷ Similarly, the Grey Sauble Conservation Authority says there was a 50% increase in visitors to its properties in 2020 and anticipates continued 'over-tourism' in 2021.⁵⁸

In response to over-tourism concerns, many communities are considering visitor-management strategies, with initiatives such as limiting hiking/trail access to reservation only during peak periods to curb over-tourism.

⁵⁵ Google COVID-19 Community Mobility Reports, accessed March 19, 2021, [google.com](https://www.google.com/covid19/mobility/)

⁵⁶ Ritchie, Hannah - Google Mobility Trends, [ourworldindata.org](https://ourworldindata.org/google-mobility-trends)

⁵⁷ Owen Sound Sun Times, [owensoundsuntimes.com](https://www.owensoundsuntimes.com)

⁵⁸ Collingwood Today, [collingwoodtoday.ca](https://www.collingwoodtoday.ca)

Figure 18: Artist's Concept of Centre of Expertise



4. Potential Changes in Tourism Demand Related to NWMO

One of the deliverables of the Tourism Study is to identify the potential changes in tourism that will result from the implementation of the NWMO Project as people come to visit the community that is hosting the Deep Geological Repository and the associated Centre of Expertise. Based on feedback and analysis, the following impacts are expected to have positive and negative effects on the tourism industry of the Municipality of South Bruce.

4.1 Key Findings

- Negativity about the NWMO Project has the potential to exacerbate an already fractured population, which could result in a decrease in people's willingness to volunteer for or start up community events that attract some tourists.
- Increases in truck traffic on area roads during the construction phase may have a negative impact on traffic, perhaps slowing arterial routes to a crawl. Mildmay and Teeswater may not be attractive as visitor destinations if trucks are constantly rumbling through the downtown cores.
- Positive tourism demand related to the development of the NWMO project will depend upon the appetite among key stakeholders to maximize the functionality of NWMO facilities for use by residents and visitors to South Bruce. If, for example, local stakeholders embrace the concept of the Centre of Expertise, then the potential for positive changes in tourism demand are increased. If the community does not embrace the Centre of Expertise, then its potential to increase demand will not be as high.
- South Bruce should consider the history of decline in conference and business-

related travel during and immediately following the COVID-19 pandemic. Additional scrutiny should be directed toward projections for visitors related to non-NWMO-related conferences and meetings. While there are opportunities for the Centre of Expertise to house conference-related spaces, capacity should be gauged relative to future anticipated demand of NWMO-related events only. Be wary of over-emphasizing the potential for conferences sourced from other markets or industries.

- As Indigenous tourism continues to grow, South Bruce could consider potential collaborations with regional Indigenous communities on joint tourism development projects, and in consultation with Indigenous Tourism Ontario (ITO). If Indigenous stakeholders are willing to participate, this new activity will have a positive impact on tourism demand.
- If the NWMO Project proceeds, there will be competition among all employers for workers, and the tourism industry may struggle to find employees to meet consumer demands.
- Other international studies (not part of this Project) of safety risks in other countries have had negative impacts on tourism, and all other industries and community as well.
- Temporarily hazardous incidents in other locations indicate that tourism impacts are “short-lived and distance-dependent.”

4.2 Negative Impacts

Workforce Availability and Cost

The aim of the Municipality of South Bruce Local Hiring Effects Study and Strategy⁵⁹ was to help the community make informed decisions about the NWMO Project and the potential positive benefits and negative impacts of locating the repository and associated facilities within the Municipality. In a risk assessment, the study points to the following challenges that need to be mitigated:

- **Rate of population growth and retirees:** The population of South Bruce projected to grow by 3% over the next decade. Additionally, 15% of the total population is nearing retirement (55-64). Projected growth may not be enough to support the required employment in the area. There will be a need to replace the retiring workforce with younger local employees.
- **Limited access to general labour:** There is a lack of workers locally. If the NWMO Project is approved, this situation is expected to be exacerbated by high competition among all businesses for skilled, general, and temporary labour.
- **Export of workers:** Currently, South Bruce exports more workers daily out of the community than into it. Continued out-community of the workforce will negatively impact the community, environment, and economic business opportunities available locally.
- **Not enough local employment promotion:** More information sharing is needed in South Bruce about job opportunities. Larger employers tend to be more organized and reach out to potential employees more quickly than small businesses, such as those in tourism.

⁵⁹ MDB Insight, April 2022

- **Lack of local/ regional diversity:** Workforce participants, including newcomers who purchase businesses from existing South Bruce residents, may have difficulties developing a sense of inclusion within the local community due to ethnic and racial diversity. South Bruce currently has substantially less diversity than the provincial percentage.
- **Vulnerable business sectors:** It is difficult for smaller businesses to attract and retain local workers due to wage gap disparity between large and small industries in the same region. Small businesses are competing with large industries for the same talent pool. They may not have the supports and workplace accommodations that larger employees prefer.
- **Amenities and infrastructure limitations:** Residents' ability to live and work in South Bruce may be impacted by limitations on transportation, childcare, grocery stores, broadband connectivity, short-term accommodations, hospitals, and recreational facilities. If infrastructure improvements are not addressed, the local infrastructure may not be able to keep pace with the potential increase in the workforce.
- **Gaps in housing options:** Unless the lack of housing options and improvements to existing housing stock and new developments are addressed, there may be limits to attract residents and remote workers consistently, as well as seasonal employees for the tourism industry. The "Incubate and Cultivate Location" Centre of Expertise concept outlined in the Southwestern Ontario Housing Needs and Demand Analysis Study (May 2022), provides a multi-purpose suggestion that links housing, training, tourism, and office employment in a campus package.

Traffic Disruptions

The NWMO Project is expected to bring increased traffic that will disrupt typical traffic patterns in South Bruce and other communities. NWMO anticipated the need to plan for transportation issues in its report, "Moving Forward Together: Planning Framework for the Transportation of Used Nuclear Fuel."⁶⁰ The following factors were identified:

- Adequacy of transportation infrastructure
- Potential for traffic congestion and potential impact on commuters
- Political and social acceptance
- Route selection and load sizes
- Safety and security concerns

The draft Local Traffic Study Report⁶¹ of the Southwestern Ontario Community Study observed commercial trucks and agriculture-related vehicle traffic on almost every road in the Study Area (municipalities of South Bruce, Huron-Kinloss, Brockton, Morris-Turnberry and North Huron). Key safety issues observed include:

- Hidden driveways, parking, and blocked sight lines near intersections
- Poor night-driving conditions (limited lighting), and horse buggies on shoulders at night

⁶⁰ NWMO, 2021, nwmo.ca

⁶¹ Morrison Hershfield, "Local Traffic Study Report", June 14, 2022, Draft

- Absence of shoulders, poor pavement conditions, and lack of safe-passing opportunities
- Large commercial vehicles, horse-carriers, and horse buggies on shoulder
- Missing posted speed signs, and missing turn arrows
- School buses stopping in travel lane
- Unmarked crosswalks and stop bars
- Wildlife collisions

The report stated that these safety concerns are particularly important on road sections that are also shared with vulnerable road users (i.e., pedestrian, cyclists, and horse-powered buggies) and slow-moving agricultural vehicles.

Disruption to Rural Character of South Bruce

The current rural character of South Bruce is part of its tourism appeal. Stakeholders have expressed concern about negative impacts on the rural character of the South Bruce with the potential influx of people who are not familiar or respectful of the community. This potential impact would not be unique to NWMO, as it could relate to any major industrial development or increases in population.

Stigma

Some stakeholders have expressed concern that the presence of a radioactive waste facility in South Bruce will create a stigma that will not be attractive to tourists. A Candence Economics report⁶² for the Government of Australia, provides the following counter argument. In Port Hope, Ontario, a facility hosts low-level waste from contaminated soil in an above-ground containment mound. The facility is in close proximity (5 km) to a population base of about 12,000 people. Accommodation and food services and retail trade are two key factors for tourism, and for these sectors, the proportion of employees in Port Hope are higher than for Ontario more broadly. "If the facility was having adverse impacts on tourism," the report stated, "it would be reasonable to expect the proportion of employment in these industries to be lower than in Ontario."

Safety Risks

The NWMO Project involves the safe storage of used nuclear fuel deep underground. A report by Western University, "The Corrosion/Dissolution of Used Nuclear Fuel in a Deep Geological Repository," (April 2022), reviews the basic properties of UO₂ (uranium dioxide) nuclear fuel, how they are changed by in-reactor irradiation, and how these changes influence fuel behaviour inside a failed used nuclear fuel container in a DGR. The report concludes that "evidence from the Cigar Lake natural analogue provides a solid base of supporting evidence that corrosion will be minimal. It also yields solid support that H₂, in the geological case produced only radiolytically, will be the major factor in stabilizing U^{IV} and maintaining the very long-term stability of the UO₂ fuel matrix."⁶³

Some stakeholders have expressed concerns about a worst-case scenario where a

⁶² Economic Impact Assessment, Department of Industry, Innovation and Science, July 2018, [industry.gov.au](https://www.industry.gov.au)

⁶³ NWMO, Western University, [nwmo.ca](https://www.nwmo.ca)

radioactive contamination incident (however unlikely) necessitates the temporary or long-term evacuation of the population base of the local area. Not only would this situation have a dire impact on tourism but would hinder all other industrial sectors, as well as any community vibrancy or agriculture.

An excerpt from the peer review report prepared for the Municipality of South Bruce Agriculture Business Impact Study by the GHD and Radiation Safety Institute of Canada states that:

Contamination Risk – Deep Geological Repository and Pre-Storage Processing Centre:

The fuel being sent to the DGR will not be fresh out of the reactor. Fuel will only be sent to the DGR if it has been out of the reactor core for at least 10 years. Much of the fuel will have been out of the reactor for 30 years or more. After 10 years of "cooling", the fuel contains very little of the volatile fission products that were of concern for contamination spread for the operating nuclear power plant. This is because these volatile fission products have very short half-lives. A half-life is the time taken for 50% of a radioactive substance to disappear due to radioactive decay. For example, Iodine-131 has an 8 day half life, so after fuel is removed from the reactor core, there is only half of the I-131 that was originally present after 8 days; after 8 more days only ¼ of the I-131 that was originally present is still in the fuel; and after another 8 days, the fuel is down to 1/8 of what was originally there. After 10 years, it is all gone. Similarly, after 10 years, noble gas fission products are significantly reduced or are completely absent (Xenon-135 has a half-life of 9.2 hours, Krypton-85 has a half-life of 10.7 years, and Argon-41 has a half-life of 109 minutes). As such, the aged spent fuel being sent to the DGR has very limited potential for spread of contamination. Additionally, there will be no tritium contamination issue at the DGR, as there is no tritium or heavy water being transported to this facility – it is only receiving the aged spent fuel. The main risk for contamination due to this aged spent fuel will be for workers handling the containers, due to any surface contamination present when packaged at the nuclear power plant. However, such material will be limited (just on the surface of the material) so that there is a VERY limited potential for contamination spread within the facility, such that there is no risk for widespread contamination of food grown or processed in the immediate area. The planned DGR is designed to limit spread of such material within the facility itself, as well as to the surrounding environment.

The DGR will be operated under the same regulatory environment as nuclear power plants, and will be required to also have a robust environmental release control and monitoring program. The regulator, the [Canadian Nuclear Safety Commission], will also perform environmental monitoring around the DGR. These control and monitoring programs will ensure and demonstrate that food grown in the environment of the DGR is safe.

Clark University⁶⁴ studied the tourism impacts of potentially using a highway route through Lincoln County, Nevada, as a corridor for shipments of high-level radioactive waste to a proposed depository at Yucca Mountain. Five state parks in the area contribute visitor revenue to nearby communities. Based on worst-case documented accounts of immediate event-induced tourism impacts, the study's authors suggested that tourist-related revenues at destinations within inner impact zones may potentially suffer 50% reductions for one to two months following an accident. Those located in outer impact zones could be anticipated to have 25% reductions for two to four weeks. Continuing impacts of 5% lasting four to ten months at inner zone destinations and 1% lasting four to ten months at outer zone

⁶⁴ J.J. Himmelberger, George Perkins Marsh Institute, Clark University, 1995.

destinations were plausible.

A report published by a professor at the University of Pennsylvania⁶⁵ and others studied the potential effect of a high-level nuclear waste repository on people's decisions about where to vacation, work, or live. Respondents were asked to decide whether a repository located 100 miles away would make a place less desirable for certain activities. When asked about vacationing, 57% of national respondents and 50% of those in Nevada reported that such a repository would make the area less desirable. Convention attendance is the behaviour that appears least sensitive to siting the repository 100 miles away. Only 43% of the national respondents and 42% of the Nevada sample indicated that they would be less likely to attend a convention (Las Vegas is approximately 100 miles from Yucca Mountain).

Tourism has been popular in Bruce County for generations, and visitors continued to support the tourism industry even after the arrival of Bruce Power in 1967. In 1975, MacGregor Point Provincial Park opened on 2,980 acres of land 20km north of Bruce Power.⁶⁶ In 2000, the park was expanded due to its popularity. In 2019, MacGregor Point was ranked among the Top 10 provincial parks in terms of winter visitation.⁶⁷

4.3 Positive Impacts

Centre of Expertise

NWMO has indicated that a Centre of Expertise will be established at, or near, the DGR site. Early in the consultation process, NWMO published artists' concepts of the facility, including the image in Figure 18 (page 28). NWMO describes the facility on its public website⁶⁸ as a centre to support the multi-year testing and assessment of the site with a focus on safety and community well-being.

The design and use of the centre, NWMO stated, will be developed collaboratively with those living in the area. Examples of functions include acting as a focal point for the community to learn about the DGR project, and a destination that welcomes visitors from the region and beyond. Opportunities to work with the community to sustain and enhance the natural environment will be explored.

The [Centre of Expertise] will be home to a technical and social research program, and a technology demonstration program, involving scientists and experts from a wide variety of disciplines. The centre will also house demonstration equipment that displays the entire packaging and container placement process. In later phases of the project, it will become a hub for knowledge-sharing across Canada and internationally. - NWMO

In June 2022, NWMO and the Municipality of South Bruce signed a Memorandum of Understanding, in which several commitments were made regarding tourism:

Principle 14 – *The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote tourism in South Bruce and the surrounding communities. The Municipality of South Bruce will develop a tourism plan based on the Tourism Industry Effects Study and strategic recommendations from local tourism providers. The plan will include the NWMO's Centre of Expertise becoming a*

⁶⁵ H. Kunreuther, W.H. Desvousges, P. Slovic, Environment, Vol, 30, No. 8, 1988.

⁶⁶ Government of Ontario, [ontario.ca](https://www.ontario.ca)

⁶⁷ Ontario Parks, [ontarioparks.com](https://www.ontarioparks.com)

⁶⁸ NWMO, [nwmo.ca](https://www.nwmo.ca)

tourist destination in the region. There is also the opportunity for the municipality to partner with the NWMO on future underground tours of the facility. The Municipality and NWMO will negotiate a funding agreement to support the tourism plan. That agreement will become a part of a Hosting Agreement between the Municipality and the NWMO.

Preferred Attributes of the Centre of Expertise

Consultations with South Bruce residents and officials have helped to sketch out preferred attributes for the Centre of Expertise. From a purely functional point of view, the building or campus will act as the visitor centre for the DGR, as well as the community. Neither the site plan, floor plan, staffing complement, nor the spectrum of programming and services have been fully developed for the Centre of Expertise. In the following section, the attributes are grouped into five levels of service delivery.

1) No Public Programming

The following attributes are basic requirements for the proposed Centre of Expertise that houses the NWMO's technical and social research program, and technology demonstration program but has a minimal public-facing function:

- Green energy building / sustainable design
- Symbolic landmark of community pride
- Public washrooms
- Community meeting space

Examples: Ontario Agri-Food Venture Centre;⁶⁹ Simcoe Research Station of University of Guelph;⁷⁰ Birds Canada (Figure 19)⁷¹

Figure 19: Birds Canada Headquarters



⁶⁹ Ontario Agri-Food Venture Centre, northumberland.ca

⁷⁰ Simcoe Research Station, uoguelph.ca

⁷¹ Birds Canada Port Rowan office, birdscanada.org

2) Passive Programming

- Static exhibits featuring information about the DGR, as well as the points expressed previously
- Accessible trails, green space, community gardens or parks
- Exhibits reflecting the agricultural history of South Bruce and the Indigenous history of the area

Examples: Bruce Power Visitor Centre, Walkerton Clean Water Centre (attendance: 19,000 visitors, 2019)

3) Active Local Programming

- Entertaining visitors to the region, plus above points
- Food and drink area featuring locally sourced products and meals
- Destination for small meetings
- Hands-on/interactive rotating exhibits to keep people coming back
- Agricultural awareness program
- Large outdoor event hosting

Examples: New York Kitchen;⁷² Frederik Meijer Gardens and Sculpture Park,⁷³ (Figure 20, attendance: 550,000 visitors, 2021)

Figure 20: Frederik Meijer Gardens and Sculpture Park



⁷² New York Kitchen, nykitchen.com

⁷³ Frederik Meijer Gardens and Sculpture Park, meijergardens.org

4) Active Regional Collaboration

- Booking centre for underground tours of the DGR facility
- Innovation Hub for training and learning, not just for the DGR project (e.g., for all trades) but as a local and regional learning centre taking advantage of the regional nuclear industry, plus all aspects of the previous service delivery models outlined
- Training and internships for local and regional residents should be offered at the facility
- Link with a University/College to attract Research & Development and business opportunities

Examples: Vineland Research and Innovation Centre;⁷⁴ Agriculture and Food Technology Park⁷⁵

5) International Host

- International research and development facilities, frequent hosting of international professionals (e.g., scientists, engineers, technicians, etc.) in the nuclear waste management sector, plus all points described under other service delivery models
- Training and internships for Canadian, U.S. and overseas professionals should be offered at the facility
- Link with Canadian and international universities to attract Research and Development and business opportunities
- World-class installation (e.g., Deep Rock Sculpture Park)
- Hotel accommodation on-site or nearby

Examples: Cornell Lab of Ornithology⁷⁶ (Figure 21, attendance: 55,000 visitors annually); Cornell AgriTech,⁷⁷ Corning Museum of Glass⁷⁸ (attendance: 500,000 visitors annually)

Figure 21: Cornell Lab of Ornithology



⁷⁴ Vineland Research & Innovation Centre, vinelandresearch.com

⁷⁵ The Technology Farm, thetechnologyfarm.com

⁷⁶ Cornell Lab of Ornithology, birds.cornell.edu

⁷⁷ Cornell AgriTech, cornell.edu

⁷⁸ Corning Museum of Glass, cmog.org

4.4 Potential Economic Impact of the Centre of Expertise

To generate the projected economic impact of the proposed Centre of Expertise, a series of visitor estimates were calculated by the Tourism Regional Economic Impact Model (TREIM) model.⁷⁹ Five scenarios were prepared (see Figure 22) using the industry code for museums and galleries.⁸⁰

Figure 22: Economic Impact of Centre of Expertise - Visitation Scenarios

| Centre of Expertise Economic Impact, Bruce County, 2025 ⁸¹ | | Very Low Visitation | Low Visitation | Medium Visitation | High Visitation | Very High Visitation |
|---|---------------------------------------|---------------------------------|-----------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| Visitor Volume & Profile | Ontario | 2,500 visitors 100% same day | 5,000 visitors 5% stay 1 night | 10,000 visitors 10% stay 1 night | 20,000 visitors 25% stay 1 night | 40,000 visitors 25% stay 2 nights |
| | Rest of Canada | 250 visitors 100% same day | 500 visitors 50% stay 1 night | 1,000 visitors 100% stay 2 nights | 2,000 visitors 100% stay 2 nights | 4,000 visitors 100% stay 3 nights |
| | US | 125 visitors 100% same day | 250 visitors 50% stay 1 night | 500 visitors 100% stay 2 nights | 1,000 visitors 100% stay 2 nights | 2,000 visitors 100% stay 3 nights |
| | Overseas | 25 visitors 100% same day | 50 visitors 50% stay 2 nights | 100 visitors 100% stay 3 nights | 200 visitors 100% stay 3 nights | 400 visitors 100% stay 4 nights |
| Economic Impacts | Annual Visitor Volume | 2,900 | 5,800 | 11,600 | 23,200 | 46,400 |
| | Annual Visitor Spending ⁸² | \$499,905 | \$604,683 | \$1,399,545 | \$2,313,865 | \$7,593,252 |
| | Gross Domestic Product ⁸³ | \$320,207 | \$386,263 | \$898,807 | \$1,534,951 | \$4,900,441 |
| | Labour Income | \$177,862 | \$215,590 | \$500,296 | \$823,942 | \$2,724,619 |
| | Employment ⁸⁴ | 4 | 5 | 12 | 18 | 60 |
| Tax Revenues | Total Taxes | \$141,303 | \$176,123 | \$403,960 | \$707,605 | \$2,171,948 |
| | Federal ⁸⁵ | \$58,804 | \$71,872 | \$165,956 | \$273,069 | \$896,121 |
| | Provincial ⁸⁶ | \$71,048 | \$90,112 | \$205,409 | \$379,870 | \$1,099,183 |
| | Municipal ⁸⁷ | \$11,450 | \$14,139 | \$32,595 | \$54,666 | \$176,645 |

⁷⁹ Ontario Ministry of Heritage, Sport, Tourism and Culture Industries TREIM Model, mtr-treim.com

⁸⁰ The industry follows Statistics Canada's North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

⁸¹ Visits take place in Bruce County in 2025. The impact is shown for Bruce, including induced impacts of household spending and induced impacts of business investment. Local government property tax revenue impacts are included.

⁸² Economic Impact of Visits in Bruce (Economic Region 3541): since no Ontario region is economically self-sustaining, 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 Bruce (3541) will spill over to the rest of the province and to regions outside Ontario. Impacts outside Ontario are not estimated by the TREIM.

⁸³ Gross Domestic Product (GDP) – Direct, Indirect, and Induced: value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. GDP is measured at market prices which include net indirect taxes on products. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

⁸⁴ Employment – Direct, Indirect, and Induced: refers to number of jobs, it includes full-time, part-time, seasonal, and temporary employment (based on the share of the year worked), for both employed and self-employed workers.

⁸⁵ 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 is collected by the federal government.

⁸⁶ 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 is collected by the Ontario provincial government.

⁸⁷ Municipal tax revenues: include business and personal property and education taxes that are 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.

A very low rate of visitation for the proposed Centre of Expertise was projected at 2,900 visitors per year, with no overnight stays estimated. Visitor spending across Bruce County generated by the proposed Centre of Expertise is estimated to total almost \$500,000, using the Province of Ontario TREIM model. Gross Domestic Product (GDP) generated is estimated to be \$320,207, including direct, indirect, and induced impacts. Labour income generated is estimated to be \$177,862, derived from 4 projected direct, indirect, and induced jobs.

A medium rate of visitation for the proposed Centre of Expertise was projected at 11,600 visitors per year, with moderate overnight stay rates estimated for each visitor profile. Visitor spending across Bruce County generated by the proposed Centre of Expertise is estimated to total almost \$1.4 million. GDP generated is estimated to be \$898,807. Labour income generated is estimated to be \$500,296, derived from 12 jobs.

A very high rate of visitation for the proposed Centre of Expertise was projected at 50,400 visitors per year,⁸⁸ with strong overnight stay rates. Visitor spending across Bruce County generated by the proposed Centre of Expertise is estimated to total over \$7.5 million. GDP generated is estimated to be \$4.9 million. Labour income generated is estimated to be \$2.7 million, derived from 60 jobs, including direct, indirect, and induced.

The range of potential economic impact – from very low to very high – depends on the facility’s dynamic programming, and its ability to attract overnight visitors from further away, including the U.S. and overseas.

The range of economic impact – very low to very high – would depend on the facility’s dynamic programming, its ability to attract residents and visitors through its doors, and to leverage any visitation from the U.S. and overseas. Visitors (industry-related or leisure-related) who have travelled greater distances are preferred over day-trip visitors, because the former typically spend more and stay longer than the latter. The capacity of the Centre of Expertise to generate success would be determined by corporate, political, and community support for its operations.

To leverage the economic impact of the Centre of Expertise for more stakeholders in the community, and to draw more Centre of Expertise visitors into main street shops and restaurants, tourism operators should work closely with staff from South Bruce and Bruce County to develop and execute an effective tourism development and marketing strategy. The strategy must include public and private realm improvements to polish up the look and first impression of the town and its businesses. Unique, authentic tourism experiences must be developed beyond simple accommodation and food services. They must be based on sound financial plans for the participating business, a smooth path to purchase for the consumer, and a consistent, high quality customer service experience.

Relationship between Programming and Economic Impact

To increase visitation and revenue generation at the Centre of Expertise, programming will need to be expanded. In Figure 23 (next page), programming decisions utilizing the preferred attributes of residents and officials would help to match visitation expectations. A Centre of Expertise with no public programming – housing only NWMO administrative offices and technical and social research programs – would have very low visitation and no economic impact on local tourism. Add a few static exhibits about DGR, as well as public

⁸⁸ By comparison, Sellafield Visitor Centre in the United Kingdom attracted more than 2 million visitors over 20 years (100,000 per year). Source: in-cumbria.com

washrooms, and some trails, and the Centre of Expertise would see low visitation and would generate a poor economic impact for the tourism industry. By implementing more active local programming, such as hands-on demonstrations and rotating exhibits about the DGR, medium levels of visitation may be realized, generating a mediocre economic impact.

The more dynamic the programming, the more likely visitation and economic impact will increase. This goal could be realized if the Centre of Expertise were to house a training centre for nuclear industry and other trades, foster student internships, and establish a regional innovation hub in partnership with educational institutions and business start-ups. The economy of South Bruce will benefit the most if programming at the Centre of Expertise focused on acting as an international host, with world-class research and development (R&D) facilities, frequent hosting and training of overseas professionals, and R&D partnerships with international universities and start-ups, and a hotel on-site or nearby.

Figure 23: Visitation Estimates and Programming Decisions

| Centre of Expertise Tourism Impact | No Impact Very Low Visitation | Poor Impact Low Visitation | Fair Impact Medium Visitation | Good Impact High Visitation | Excellent Impact Very High Visitation |
|------------------------------------|---|---|---|---|--|
| Programming | No Public Programming NWMO offices only | Passive Programming <ul style="list-style-type: none"> • Static DGR exhibits • Agricultural exhibits • Public washrooms • Trails, parks, gardens | Active Local Programming <ul style="list-style-type: none"> • Hands-on, interactive, rotating DGR exhibits keep people returning • Small meeting rooms • Outdoor event space • Hands-on agricultural and Indigenous programs and history | | |
| Collaboration | No Impact | No Impact | No Impact | Active Regional Collaboration <ul style="list-style-type: none"> • Booking centre for underground tours of DGR facility • Local / regional training centre for nuclear industry and other trades, local student internships • Regional innovation hub: R&D partnerships with Ontario universities and colleges and business start-ups | |
| International Host | No Impact | No Impact | No Impact | No Impact | International Host <ul style="list-style-type: none"> • World-class installation (e.g., Deep Rock Sculpture Park) • Hotel (on-site or nearby) • International research and development facilities, frequent hosting of international professionals (scientists, engineers, technicians) in nuclear waste management sector • Training and internships for international professionals • International innovation hub: R&D partnerships with world universities and start-ups |

Authenticity: The Sculpture Park Concept

Authenticity (the quality of being genuine) is a fundamental building block for tourism development. A study of tourists in 2019 discovered that willingness to revisit a destination increased if tourists experienced “constructive and existential authenticity.”⁸⁹ For rural communities, showcasing and monetizing their local culture, food and drink, and experiences allows them to stay true to their nature but also run viable businesses. This can be more problematic when a large corporate enterprise enters a community, presenting challenges to retain authenticity. However, many communities find ways to cope, especially if the major employer climbs on board and supports initiatives.

An example is the community of Corning, New York, headquarters of the large Corning corporation, a world leader in optical communication, mobile electronics, glass innovation, and life sciences. The company has 107 locations in 24 countries and employs 52,000 people.⁹⁰ Not only did the Corning Corporation found the Corning Museum of Glass (500,000 visitors per year), it also supports local tourism and economic development efforts through its own foundation.

In a similar vein, drawing upon authentic materials associated with NWMO could provide an opportunity for South Bruce to develop a unique attraction. Limestone rock⁹¹ excavated from beneath the ground has a multitude of purposes, perhaps sculpted, and showcased at the Centre of Expertise in a sculpture park to attract visitor spending. The Frederik Meijer Gardens and Sculpture Park (Figure 24) in Michigan, supports 804 jobs to the community and generates \$75 million in economic output annually, according to a 2017 study.⁹² The tourism product development strategy should explore the sculpture park concept.

Figure 24: Unveiling the DaVinci Horse at Meijer Gardens and Sculpture Park



Photo Source: Meijer Gardens and Sculpture Park website

⁸⁹ Tourism Management, [sciencedirect.com](https://www.sciencedirect.com)

⁹⁰ Corning, [corning.com](https://www.corning.com)

⁹¹ NWMO, “The NWMO uncovers the stories that old rocks are telling us,” January 2022, [nwmo.ca](https://www.nwmo.ca)

⁹² ABC-TV Grand Rapids, [wzzm13.com](https://www.wzzm13.com)

Visualization of Highest Visitor Impact

Both the NWMO and the municipality will play critical roles in realizing aspirations for a leading-edge facility that embraces international collaborations, while also ensuring that residents hold a stake in successful. Communicating the functions of the Centre of Expertise and making the facility a reality will require establishing a clear vision. In Figure 25 (next page), the preferred attributes described earlier are illustrated in an artist's concept of the highest visitor impact, prepared by Deloitte. Examples of authentic elements to be incorporated into the Centre of Expertise could include:

For business visitors

- Innovation hub and training centre to focus on encouraging skills development and business start-ups among local entrepreneurs and young people
- Agricultural showcase explaining the history of farming in South Bruce

For leisure visitors

- Demonstration theatre explaining the DGR, but also used for music and concerts, Indigenous programs, agriculture and academic speakers, community gatherings, and culinary / local food talks

A demonstration theatre could be used to explain the DGR, but also for culinary / local food workshops, music and concerts, Indigenous programs, agriculture and academic speakers, community gatherings, and more

- Visitor centre providing travel information, accommodation referrals, and options to book tours (e.g., underground tours of DGR) and transportation
- Gift shop showcasing artisanal products from local artists and local food products
- Indigenous exhibits and performances celebrating culture and customs

For all visitors and residents:

- Hotel accommodation for visitors and residences for visiting international guests
- Restaurant featuring local food and beverages
- Recreation grounds for spectator sports
- Park with trails and access to a stream for swimming, fishing, canoeing, and kayaking
- Outdoor amphitheatre for events and festivals
- Recreation grounds for spectator sports

The concept of a campus atmosphere that integrates many experiences – both indoor and outdoor – elevates the Centre of Expertise beyond a simple visitor centre. There can be so many more options to spend additional time at the Centre of Expertise, compared to narrow experiences and timeframes offered by the Bruce Power Visitor Centre or the Walkerton Clean Water Centre.

Figure 25: Concept of Centre of Expertise - Highest Visitor Impact



Concept prepared by Deloitte LLC based on stakeholder feedback

5. Addressing Changes in Demand

This section outlines the process of addressing changes to tourism demand, including related examples of programs in other communities.

5.1 Key Findings

The Municipality of South Bruce lacks a robust tourism industry. More importantly, it lacks a core attractor upon which to leverage increased visits and spending. The proposed Centre of Expertise could become a core attractor, if its programming is supported to the point that the facility attracts very high visitation. Supporting resources for the tourism sector will be needed if the DGR and the Centre of Expertise are established in South Bruce.

The more dynamic the programming at the Centre of Expertise, the more likely visitation and economic impact will increase. The economy of South Bruce will benefit the most if programming at the Centre of Expertise focuses on acting as an international host, with world-class research and development facilities, frequent hosting and training of overseas professionals, and R&D partnerships with international universities and start-ups. On its own, a Centre of Expertise in South Bruce with a very high rate of visitation could generate \$7.5 million in annual visitor spending, and create 60 jobs (direct, indirect, and induced). This does not include the many other emerging and supporting assets that could work in cooperation with the Centre of Expertise.

Australia and France appear to be continental leaders in creativity in Oceania and Europe respectively, when it comes to tourism-related uses associated with DGRs.

In the world of tourism-related uses associated with DGRs, Australia and France appear to be continental leaders in creativity in Oceania and Europe respectively. In North America, Canada appears to be further advanced in selecting a DGR site than the U.S., which could become an opportunity to showcase leading edge expertise and technology for Americans when they decide to build their own.

5.2 Destination Management

Whether South Bruce becomes a sustainability competitive tourism destination depends on the decisions made by community leaders and business owners. These choices will affect the marketability of the area, and impact demand by consumers of the local tourism product.

To develop a sustainability competitive tourism destination, several factors must be in place to ensure the community can compete for its targeted markets while sustaining the ability to do so over the long term. The Ritchie-Crouch Model of Destination Competitiveness⁹³ (Figure 26, next page) is used to explore the tourism potential for South Bruce.

⁹³ J.R. Brent Ritchie, University of Calgary; Geoffrey Crouch, La Trobe University; CABI Publishing, 2003

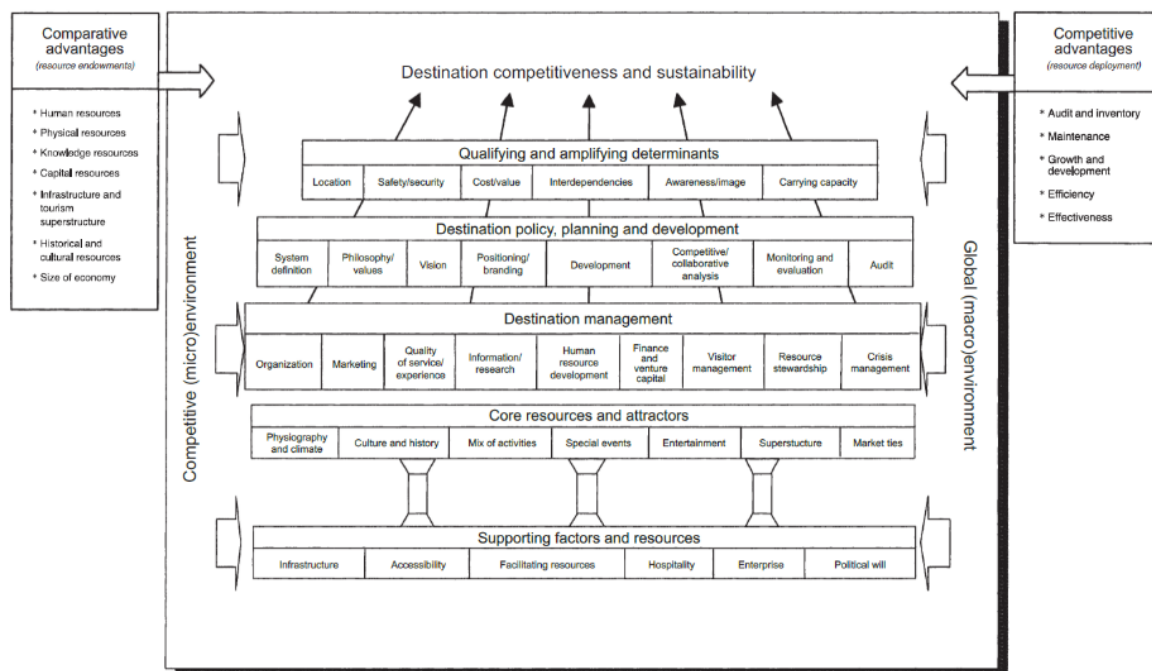
Core Attractors and Resources

To motivate a tourist to choose one destination over another, core attractors provide the basic desire for someone to travel to a place. These factors include:

- Landscape, scenery, and climate
- Culture and history
- Mix of activities
- Special events
- Entertainment
- Superstructure (hotels, restaurants, museums, unique sites)
- Market ties (family, friends, sports, work, professional, education)

The tourism assets review established that the Municipality of South Bruce does not have any of the core attractors that communities such as Tobermory, Blue Mountains, or Sauble Beach possess. Any of the unique tourism properties within South Bruce are not positioned to expand, nor can they accommodate large increases in visitors. No tourism-related business investments are scheduled for South Bruce communities.

Figure 26: Ritchie-Crouch Model of Destination Competitiveness



The development would bring significant investment and employment to South Bruce, along with the arrival of many new visitors (employment-related and otherwise) to the municipality. Therefore, the net effect of NWMO’s proposal for the community would be positive for the tourism and hospitality sector.

The construction of the Centre of Expertise, depending upon its function and facilities, has the potential to draw large numbers of visitors to South Bruce, and become a core attractor not only for South Bruce but for Southern Ontario.

Supporting Factors and Resources

Supporting factors and resources are the foundation of the tourism industry. As Ritchie-Crouch explain, "It remains mostly buried and hidden, yet it fulfils a vital role." These factors include:

- Infrastructure (transportation, public safety, water and other utilities, communication, health care, education, grocery stores, gas stations, laundromats)
- Accessibility (how easy is it to get there, by multiple modes)
- Facilitating resources (workforce, know-how, financial capital)
- Hospitality (friendliness, courtesy, customer service, resident attitudes to visitors)
- Enterprise (entrepreneurship, cooperation, innovation, productivity)
- Political will (government recognition, financial support, respect for tourism sector)

While the basic infrastructure for tourism exists in South Bruce, there is not enough critical mass at the local level to determine if the supporting resources are sufficient. From the perspective of Bruce County (with South Bruce included) many of these factors are not only present at a regional level, but in some cases, robust. Any development by the NWMO has the potential to fortify and augment supporting factors at the local and regional level.

Destination Policy, Planning, Development, and Management

Destination policy, planning, development, and management relate to the myriad of regulatory bodies, agencies, associations, and groups that play a role in shaping the tourism policies of a community. Tourism policy addresses the following:

- Overall socioeconomic development
- Financing for the tourism sector
- Nature and direction of product development and maintenance
- Transportation access and infrastructure
- Regulatory practices
- Environmental practices and restrictions
- Industry image and credibility
- Community relationships
- Labour supply
- Technology
- Marketing practices
- Taxation
- Zoning

Destination management relates to resource deployment (finances, human resources, information, strategic planning, marketing) and resource stewardship (water quality, wildlife, forestry, visitors, residents, and community integrity). Monitoring and research are also needed to measure performance. Currently, most of this work is executed at a County, provincial, or national level. As South Bruce becomes more involved in tourism, it can choose to have a voice in these matters.

Figure 27: Food Trailer for Kimba Lions Club enabled by community benefits funding



5.3 Tourism-related Uses at Similar Facilities

Since the 2006 declaration by the International Panel on Fissile Materials⁹⁴ touting deep geological repositories as the safer place to store spent nuclear fuel, numerous countries have advanced policies and projects to establish their own DGR locations. Several countries have incorporated tours and information centres into their operations, while one or two (Australia and Finland) have demonstrated more creative tourism initiatives that appear intended to spur regional economic benefits for local businesses.

As noted in the Municipality of South Bruce Agriculture Business Impact Study, a worldwide survey of radioactive waste facilities demonstrated that most nations have located or are locating projects in rural regions. None have provided any evidence to counter concerns that the tourism industry will be impacted. Any experience related to these facilities is a worldwide “first-of-a-kind-task,” meaning that no one knows the future and there are no “best practices” to lean on, because not enough experience and data has been collected. Individuals and organizations involved in this process are participating in a series of

⁹⁴ IPFM, fissilematerials.org

disconnected country-by-country experiments. There are more questions than answers.

What follows is an exploration of 11 countries that have demonstrated varying degrees of support for the local community's tourism sector, while developing nuclear waste facilities or other types of waste-remediation projects. They are grouped into three clusters of examples: creative ideas, basic support, and unknown impacts.

Creative Ideas

Several nations have used creative ideas to support local tourism and economic development into their nuclear waste projects, beyond opening a visitor centre.

Australia: National Nuclear Waste Storage Facility, Napandee, Kimba, South Australia

In 2021, the Australian Radioactive Waste Agency chose a site for low-mid level radioactive waste. The site was chosen after six years of consultations, from a shortlist of three sites.⁹⁵

Kimba is located in a rural area and has a population of 1,041. It is officially located "Halfway Across Australia" and was named the 2021 South Australian Agricultural Town of the Year.

A Community Benefit Program was established, disbursing over AUD\$1.8 million (CDN\$1.6 million) in tourism-related funding in the first phase. A second phase is complete, and applicants to round three were under consideration in spring 2022.⁹⁶ A fourth phase will close later in 2022.

Examples of tourism-related projects and funding (in AUD) allocated in Phase One include:⁹⁷

- **Capital Investments:** Restoration of local agricultural museum: \$349,040; interpretative and Showroom Centre at local museum: \$229,985; audio and visual refit of function room of local hotel: \$75,000; rejuvenation of an eight-metre-tall bird statue: \$57,838.
- **Placemaking:** Installation of distinctive town entry signage: \$265,000; matching funding for façade improvements on main streets: \$200,000; development of 290km self-drive/ride tourist trail: \$187,110; upgraded toilets and trail signage at local park: \$47,713.
- **Tourism Entrepreneurship:** Feasibility study to establish tourism business hub in nearby town: \$100,000; improved marketing capability for local tourism operators' association: \$52,500; expansion of rental space to grow creative micro-businesses and increase tourism appeal: \$38,682.
- **Food / Culinary:** Establishment of a full in-store scratch bakery in the local supermarket: \$141,667; purchase of a new mobile commercial kitchen trailer⁹⁸ for use at events: \$100,430 (See Figure 27, previous page).

Plans for a new visitor centre for Kimba are still under discussion, according to February 2022 minutes of the Kimba Consultative Committee and Economic Working Group.⁹⁹

Kimba District Council Mayor Dean Johnson provided the following update in local economic development in November 2021:¹⁰⁰

⁹⁵ Australian Radioactive Waste Agency, industry.gov.au

⁹⁶ Australia Government, business.gov.au

⁹⁷ Community Benefit Program 2019-2022 grant recipients, business.gov.au

⁹⁸ Food trailer by Bella, bellamanufacturing.com

⁹⁹ Australian Radioactive Waste Agency, industry.gov.au

¹⁰⁰ The town is buzzing, Port Lincoln Times, November 2021, portlincolntimes.com.au

- The town is seeing results from its Workshop26 Creative Quarter¹⁰¹ (Figure 28, next page), funded by the Community Benefits Program, which has locals come together to run complementary microbusinesses. Workshop26 is housed in an old tractor warehouse, which has been turned into a vibrant new arts and culture precinct for microbusiness to flourish.
- Travellers are coming through and taking a big interest, the Mayor said, adding that tourism is massively important to Kimba and becoming more so. "Visitors say they can feel the vibrancy and positivity of our community and I agree, it's truly palpable."¹⁰² Kimba's free camping strategy is working well. People are staying for a few days.
- One of Kimba's challenges has been population decline, and the Mayor claimed, "we've not only stopped that but turned it around and started to see it grow again." The younger generation are a driving force behind so many initiatives, the Mayor said, spurring on the rest of the community.
- No further results, outcomes, or performance measures were found.

Figure 28: Workshop26 – Kimba's Creative Quarter (Exterior and Interior)



Source: Workshop26 facebook page

¹⁰¹Workshop26 Creative Quarter website , workshop26.org.au

¹⁰² Adelaide Independent News, June 2022, indaily.com.au

France: Cigeo, Meuse, and Centre de l'Aube

Andra is responsible for identifying, implementing, and guaranteeing safe management solutions for all French radioactive waste. The Industrial Centre for Geological Disposal (Cigeo)¹⁰³ will be a deep geological disposal facility for radioactive waste to be constructed in 2025. Meuse/Haute Marne Underground Research Laboratory¹⁰⁴ is a laboratory located 500 metres underground in Bure, a rural town.

Centre de l'Aube is a low level and short-lived intermediate level radioactive near-surface repository built in 1992, located in a rural area, 10 km from Brienne-le-Château, population 2,907 (2015).

Figure 29: Andra's visitor centre in Soulaines-Dhuys, France¹⁰⁵



Andra's centre in rural Aube (Figure 29) is featured on the Champagne Region's tourism website.¹⁰⁶ The location is featured on Google Maps (Rating 4.1 stars, 23 reviews) but it cannot be found on TripAdvisor.

Tourism in the Aube region has also experienced significant growth, an annual average of 7.4% over the period 2005 to 2013.¹⁰⁷

Over 18,000 visitors were recorded overall at open operational days across all sites. 5,500+ visitors were recorded in 2021. There were reports of almost 100 visits by foreign delegations in 2020. Other benefits cited include:

- An old foundry was restored to highlight local industrial heritage.
- Photo competitions have been hosted with many participants.

¹⁰³ Cigeo, andra.fr

¹⁰⁴ Andra, meusehautemarne.andra.fr

¹⁰⁵ La Champaign Historique & Viticole, aube-champagne.com

¹⁰⁶ La Champaign Historique & Viticole, aube-champagne.com

¹⁰⁷ Cadence Economics, pg 38, industry.gov.au

- Dramatized tour of the underground research facilities has been created.
- Digital comic developed in collaboration with local education partners.
- Universal graphic signage system in support of artist residencies on the memory of radioactive waste is being explored.¹⁰⁸
- No further results, outcomes, or performance measures were found.

Basic Support

The following nations opened a visitor centre as part of their facilities, and sometimes provide tours and other programming.

Finland: Onkalo Spent Nuclear Fuel Repository, Olkiluoto Island, western Finland

Operations for this DGR for the final disposal of spent nuclear fuel are expected to begin in 2023. The facility will be operated by Posiva, a company owned by the two existing nuclear power.¹⁰⁹

- Olkiluoto is located 11km from the town of Rauma, population 39,000 (2020). It is also home to two nuclear power plants. It's visitor centre is one of the most popular tourist destinations in the region, attracting some 13,000–15,000 visitors each year. Group and media visits are arranged throughout the year. The site features science exhibitions and a nature trail.
- Waste heat from the nearby nuclear plant site is used for a vineyard, creating a wine called "Chateau Olkiluoto."¹¹⁰
- No further results, outcomes, or performance measures were found.

Germany: Bundesgesellschaft für Endlagerung (BGE)

The BGE is mandated by the German government to perform tasks in the final disposal of radioactive waste. Since April 2017, the BGE has been the operator of the German repository projects Konrad and Morsleben as well as the Asse mine. BGE is currently looking for a suitable DGR site in Germany, but has removed the controversial Gorleben site from the running.¹¹¹ Gorleben, which became the focus of anti-nuclear protests in the 1970s, failed on three points during site reviews related to retention, hydrochemical, and overall geological qualities.¹¹²

- BGE information centres provide information in situ about the retrieval of the radioactive waste from the Asse II mine, the construction of the Konrad repository, and the decommissioning of the Morsleben repository. Visits of individual mines are possible, and advance registration is required. No further results, outcomes, or performance measures were found.

¹⁰⁸ Andra Activity Report, andra.fr

¹⁰⁹ Posiva, posiva.fi

¹¹⁰ Energy Online, energyonline.com

¹¹¹ BGE, bge.de

¹¹² Reuters, September 2020, reuters.com

- Germany's Transport Cask Storage Facility, which handles temporary storage of radioactive waste, located 23 kilometres from Ahaus which had an estimated population in 2016 of 39,314.

Spain: El Cabril Nuclear Waste Disposal Facility, Hornachuelos (Córdoba)

El Cabril is the Spanish disposal facility for very low, low, and intermediate level radioactive waste. In July 2021, Spain launched a tender for new used fuel storage facilities.

- The El Cabril Facility in Spain is located in a national park and hunting reserve, 23 km from the town of La Cardenchoa which has a population of 134 in 2017.¹¹³
- Between 1992 and 2014 more than 100,000 people visited El Cabril's information centre.¹¹⁴ No further results, outcomes, or performance measures were found.

Sweden: SKB, Forsmark Nuclear Waste Storage Facility, Forsmark, Östhammar

In January 2022, the Swedish Government approved SKB to build a final repository for spent nuclear fuel and an encapsulation plant. Eight communities were initially considered for the site and Forsmark, 17km from Östhammar (population 22,364, 2021), was chosen.

SKB also operates visitor tours at the Äspö Hard Rock Laboratory in Figeholm, 30km north of Oskarshamn (population 26,309, 2021).¹¹⁵ Google reviewers awards the attraction 4.8 stars, with 4 reviews, and the facility has one positive review on TripAdvisor. Tour guides give a brief presentation of SKB, then guests travel by bus down to a depth of 420 metres in the bedrock. The tour gives guest a chance to look at some of the experiments that researchers are performing together with experts from several other countries. Guests then take an elevator up to ground level to the research village. The tour is free of charge. No further results, outcomes, or performance measures were found.

Switzerland: Nagra, National Cooperative for the Disposal of Radioactive Waste

Established in 1972, the company disposes of Switzerland's radioactive waste. A DGR facility is being considered in one of three regions. An interim storage facility in Würenlingen has handled all categories of radioactive waste in Switzerland in operation since 2001.

- Würenlingen (population 3,805 in 2020) is located 11km northwest of Baden (population 19,629 in 2021).
- A guided tour of the Würenlingen facility is free of charge and lasts 2 hours. Pre-registration is required.¹¹⁶ Visits to Bözberg and Marthalen drill sites and rock laboratories are also possible.¹¹⁷
- No further results, outcomes, or performance measures were found.

¹¹³ Economic Impact of Assessment of the National Radioactive Waste Management Facility, industry.gov.au

¹¹⁴ Enresa, enresa.es

¹¹⁵ SKB, skb.com

¹¹⁶ Axpo, axpo.com

¹¹⁷ Nagra drill sites, nagra.ch

United Kingdom: Sellafield, West Cumbria, England

Sellafield is a large multi-function site and a former nuclear power-generating site where, as of August 2020, activities included nuclear fuel reprocessing, nuclear waste storage, and nuclear decommissioning. It houses roughly 75% of the UK's current nuclear waste. The site is located 4km from Seascale (population 1,747 in 2020) and 12km southeast of Whitehaven (population 23,423 in 2020).

Sellafield Visitor Centre opened in 1988 and attracted more than 2 million visitors before it closed in 2008.¹¹⁸ The story of Sellafield is now told through an exhibit at The Beacon Museum.¹¹⁹ No further results, outcomes, or performance measures were found.

Unknown Impacts

The following nations have varying experiences related to projects. In some cases, the project is still in an exploratory stage.

Canada: Giant Mine Remediation Project, Yellowknife, Northwest Territories

The 2,300-acre mine site is highly contaminated with arsenic trioxide dust and fibrous asbestos. The remediation seeks to clean up the mine site for human and environmental safety via DGR and freezing of arsenic chambers. The project is co-managed by the Governments of Canada and the Northwest Territories, and Yellowknives Dene First Nation.¹²⁰ Yellowknife Historical Society is creating a Museum and Interpretation Centre.¹²¹ No further results, outcomes, or performance measures were found.

Czechia: Deep Geological Repository Shortlist

The Czech Cabinet has approved a shortlist of four potential sites for a deep geological repository for used nuclear fuel and high-level radioactive nuclear waste. The government has also approved a new schedule calling for the site to be selected by 2030, five years later than originally planned. The repository is expected to be operational by 2065. The host municipality will receive CZK4 million (CDN\$210,000 per year according to current legislation, plus a further contribution of CZK 10,000 (CDN\$537) for each cubic metre of radioactive waste disposed of in a given calendar year.¹²²

United Kingdom: UK Geological Disposal Facility Site Selection

The United Kingdom (UK) is exploring options to create a Geological Disposal Facility (GDF) to house its nuclear waste. Three sites in the north of England are being assessed. In communities being assessed, funding is available for Economic Development initiatives (employment opportunities, job creation, skills development, education or training, promotion of local enterprise, long-term economic development or economic diversification), Natural or Built Environment (cultural and natural heritage, especially where economic benefits, for example through tourism, can be demonstrated) and Community Wellbeing (improvements to community facilities and enhancement of the quality of life or health and well-being of the community).¹²³ Reports of specific projects have not been published.

¹¹⁸ In Cumbria, in-cumbria.com

¹¹⁹ Beacon Museum, thebeacon-whitehaven.co.uk

¹²⁰ Giant Mine Closure and Reclamation Plan, rcaanc-cirnac.gc.ca

¹²¹ Yellowknife Historical Society, yellowknifehistory.com

¹²² Radioactive Waste Repository Authority, sura0.cz

¹²³ Allerdale GDP Community Partnership, workinginpartnership.org.uk

United States: Yucca Mountain, Nevada

A deep geological repository storage facility was proposed here for spent nuclear fuel and other high-level radioactive waste in the U.S. However, due to lobbying groups and lack of political support, construction of the facility has not begun.

United States: Waste Isolation Pilot Plant (WIPP), Carlsbad, New Mexico

This deep geological repository is licensed to store transuranic radioactive waste for 10,000 years. The waste is from the research and production of United States nuclear weapons only. The plant started operation in 1999 about 5 km south of downtown Carlsbad (population 31,478 in 2022).

- Carlsbad established a meeting and conference centre, training and manufacturing centre, and laboratory and research centre.
- People may visit the WIPP Experience Exhibit at an office building in Carlsbad, featuring a brief documentary on the project and displays.¹²⁴ Public tours of WIPP are not available, however there is a policy¹²⁵ for special groups, evidenced by a 2019 tour for employees and family.¹²⁶
- No further results, outcomes, or performance measures were found.

¹²⁴ WIPP Energy, wipp.energy.gov

¹²⁵ Tour Policy, energy.gov

¹²⁶ Family Tour of WIPP, energy.gov

6. Strategies to Increase Tourism

6.1 Tourism Development Strategy Options

Three options are available to the Municipality of South Bruce to develop a tourism strategy in relation to the proposed NWMO project. Each option has its own set of assumptions and expected outcomes or opportunities.



Option 1: Do Nothing

Assumptions – Option 1:

In the first scenario, the following assumptions are made:

1. The Municipality of South Bruce does not develop a tourism strategy or action plan.
2. The Municipality does not provide any direction to the NWMO about the design, construction, or operation of the proposed Centre of Expertise and its preferred impact on the local tourism industry.
3. The Municipality does not provide any framework for the private sector regarding the development of the local tourism industry and does not actively lead collaborations with NWMO.
4. The NWMO project proceeds as understood currently.

Expected Outcomes – Option 1:

NWMO may engage the community about the development of the Centre of Expertise. It is unlikely that any dynamic uses will be initiated to attract visitors from beyond Bruce County. The Centre of Expertise may be built simply as office and lab space for NWMO and will provide no tangible spin-off benefit to the local economy.

NWMO may host training for its purposes at the Centre of Expertise but will provide no additional educational programs. Professionals from around the world may visit the NWMO facilities, but not in sufficient numbers to warrant hosting them locally. They may be housed in nearby towns and cities and driven in for the day.

It is unlikely that any new accommodation, retail, or restaurant businesses will be needed, except those built to satisfy the needs of the local workforce. Residents will not see any tangible economic impact for the Centre of Expertise and will not benefit from any positive impact related to increased assessment on the property tax base.

Option 2: Passive Tourism Investment

Assumptions – Option 2:

In the second scenario, the following assumptions are made:

1. The Municipality develops a general tourism strategy and action plan but does not specifically leverage the potential of the Centre of Expertise within the context of enhancing the tourism industry.
2. The Municipality monitors NWMO's decisions on the design, construction, and operation of the proposed Centre of Expertise but makes no recommendations and does not get involved in the project.
3. The Municipality continues to monitor outcomes of the general tourism strategy with feedback from the private sector, but there is no specific leadership provided in terms of how the private sector may benefit from or collaborate on the Centre of Expertise.
4. The NWMO project proceeds as understood currently.

Expected Outcomes – Option 2:

NWMO may engage the Municipality of South Bruce and other stakeholders about the development of the Centre of Expertise as an administrative headquarters and visitor centre. If response is minimal or feedback is unclear, additional uses that could bring economic impact to the tourism industry of South Bruce may or may not be considered.

The Centre of Expertise will likely not reach its full potential and may not complement the tourism and hospitality sector of South Bruce. Without ongoing communication and collaboration programming at the Centre of Expertise, if it exists, may not fit within any tourism strategy developed by South Bruce.

Businesses may be unaware or unsure how to leverage the positive impact of the development of a Centre of Expertise. It will be less likely that new businesses will invest in the area. Existing businesses may not have enough information or confidence to make decisions that will help to enhance the tourism superstructure of the region. Without a firm business case, new accommodation or retail companies will likely not locate in South Bruce.

Learning or training opportunities may not be available to young people or businesses, outside of NWMO related programs.

Another community somewhere in the world may earn the reputation as a host to high-profile international guests who are the development of a DGR, and the economic benefit they can bring to the surrounding community. Those visitor dollars will be lost to the other community.

It may be more difficult to assess the tangible economic and social benefit of the Centre of Expertise to the people of South Bruce, and to the tourism industry locally and regionally. Residents may not understand what positive effect the Centre of Expertise could have on their financial situation.

If developed without oversight, uses on or near the Centre of Expertise may not be complementary to the wishes of residents.

Without a core attractor in South Bruce, the municipality will need to spend more money on wayfinding signage and marketing in attempts to divert visitor traffic away from other areas.

Option 3: Proactive Tourism Investment

Assumptions – Option 3:

In the third scenario, the following assumptions are made:

1. The Municipality of South Bruce develops a sustainable tourism management strategy that specifically outlines how to leverage the potential of the proposed Centre of Expertise, align municipal resources and policies with aggressive tourism development objectives, and enhance tangible opportunities for the tourism industry locally.
2. The Municipality adopts a vision for the Centre of Expertise as a multi-faceted campus of opportunity, with a very dynamic offering of services and programs, attracting a high visitation rate and spending model, and acting as a world-class facility to host international guests.
3. The Municipality places enough human and financial resources in place, and engages enough stakeholders, to provide specific recommendations to the NWMO about the design, construction, and operation of the proposed Centre of Expertise, and about the project's alignment with and impact on other community, economic, and agricultural objectives.
4. The Municipality provides a clear framework to the private sector regarding the development of the local tourism industry, particularly in relation to the Centre of Expertise.
5. The NWMO project proceeds with NWMO partnering actively and financially with the Municipality, other organizations, and the private sector to maximize the impact of the proposed Centre of Expertise.

Expected Outcomes – Option 3:

NWMO, the Municipality of South Bruce, and other stakeholders commit to developing the Centre of Expertise as an international host facility, providing state-of-the-art research and development facilities, training programs, dynamic exhibits, and initiatives, as well as robust experiential programs for visitors from around the world.

The Centre of Expertise is developed into a cluster of services, attractions, and amenities that complement the tourism and hospitality sector of South Bruce, as well as attract new businesses, and retain and expand existing enterprises to enhance the tourism superstructure of the region. The potential for a hotel and additional restaurants and retail is high.

Local businesses, workers, and young people can learn about opportunities available in the NWMO supply chain, and the tourism and hospitality industry.

The Municipality of South Bruce gains a reputation as a host for high-profile international guests who are exploring ideas, technologies, and expertise related to the development of a deep geological repository, and the economic benefit it can bring to the surrounding community.

The Centre of Expertise provides a tangible economic and social benefit to the people of South Bruce, and to the tourism industry locally and regionally. Reports are generated annually to inform stakeholders and raise awareness.

Investments in wayfinding signage and marketing tactics will be more cost-effective because a dynamic Centre of Expertise represents a promising destination for which tourists can invest time and effort.

7. Recommendations

It is recommended that the Municipality of South Bruce pursue a proactive tourism investment model for the NWMO opportunity, to provide the highest positive impact to the local tourism industry and the most compatible social benefits to the community.

1. Develop a tourism strategy and action plan that specifically leverages the potential of the proposed Centre of Expertise to align with tourism development objectives and to enhance opportunities for the tourism industry locally.
2. Allocate administrative resources to the execution of a Centre of Expertise Team, with satisfactory human resources and public oversight.
3. Investigate the concept of a Deep Rock Sculpture Garden for South Bruce, utilizing rocks excavated from deep below the community, and engaging world class, local, and Indigenous sculptors to create works for display on the grounds of the Centre of Expertise or in the community.
4. Provide specific recommendations to the NWMO about the design, construction, and operation of the proposed Centre of Expertise, and about the project's alignment with and impact on other community, economic, and agricultural objectives.
5. Advocate for the NWMO and senior levels of government to focus the primary purpose of the Centre of Expertise as an international host facility, positioning South Bruce as a world leader in the DGR space, and to attract as much worldwide visitation, spending, and investment in the facility and the local tourism industry as possible.
6. Execute financial partnerships between NWMO and the Municipality, other organizations, and the private sector to maximize the impact of the proposed Centre of Expertise.
7. Provide a clear framework to the private sector regarding the development of the local tourism industry, particularly in relation to the Centre of Expertise.

Appendix A: Study Charter

Introduction

The project charter (abridged) is a reference document to be used throughout the creation of a Tourism Study for the Municipality of South Bruce. The project charter confirms the project scope and tracks progress towards the achievement of deliverables. The charter indicates:

- Project sequencing and staging of tasks
- Key decision points
- The expected completion date of the project deliverables
- The roles and responsibilities of both the consulting team and client
- The project charter contents include a brief description of the engagement plan and a detailed work plan and timeline.

Project Description

Key deliverables of the project will be the development of the Tourism Study, which will identify opportunities to expand the tourism sector in South Bruce in a manner that is consistent with the unique natural and agricultural character of the community of South Bruce. Specific objectives include:

- Describe the unique natural and agricultural character of the community of South Bruce that are important attributes of the local area that support tourism.
- Identify the potential changes in tourism that will result from the implementation of the Nuclear Waste Management Organization (NWMO) Adaptive Phased Management (APM) Project as people come to visit the deep geologic repository and the associated Centre of Expertise.
- Identify strategies for expansion of the tourism industry in South Bruce to meet the change in demand that also preserve the unique natural and agricultural character of the community.

The deliverables will reflect the Municipality's Project Principles. Considerations of the project will be to:

- Document the current tourism industry in South Bruce including attractions and destinations, activities, accommodation and dining experiences; duration of visits, and any other information that is available on people who arrive in South Bruce for non-work-related reasons.
- Document any planned expansion of the activities or facilities that contribute to tourism such as recreational complexes, markets, fairs.
- Document any unique natural or agricultural features in the community that could benefit from additional tourism.
- Describe the expected increase in tourism that will occur with the development of the APM project, when that increase in tourism would be expected to occur, and its nature.

- Describe programs that have been used in other communities to increase tourism; especially tourism related to industrial activities, including the costs and results of such programs.
- Describe strategies that could be implemented in South Bruce such that any increase in tourism resulting from the APM project is to the general benefit of the tourism industry in South Bruce.

This study will require information respecting the Centre of Expertise and the anticipated draw of that facility as an educational and industrial tourism destination. This study will also provide information that will be considered in the local economic development study.

Stakeholder Engagement Plan

A strong communications plan is essential in supporting the successful execution of the work plan. The communications plan includes:

- Definition of key messages
- A list of proposed engagement activities

Key Messages

The following key messages will guide our communication updates.

1. The Municipality of South Bruce is undertaking a Tourism Study to identify opportunities to expand the tourism sector in a way that complements the unique natural and agricultural character of the community. The study will also identify the potential changes in tourism that will result from the implementation of the Nuclear Waste Management Organization (NWMO) Adaptive Phased Management (APM) Project as people come to visit the deep geologic repository and the associated Centre of Expertise. Strategies for expansion of the tourism industry in South Bruce will also be explored to meet the change in demand that also preserve the unique natural and agricultural character of the community.
2. Assisting in this process is MDB Insight, an experienced and respected consulting firm that will be involved throughout the development of research and analysis for the Agriculture Business Impact Study, including all stakeholder engagement aspects of the project.

Engagement Plan and Reporting Outline

The figure below outlines all stakeholder engagement activities anticipated for the project and their respective planning and implementation considerations.

| Activity | MDB Insight Responsibilities | Municipality of South Bruce Staff Responsibilities | Target Audience | Rationale/Question(s) | Timing/ Status |
|---|--|---|---|---|----------------|
| Initial Client Meeting | <ul style="list-style-type: none"> ▪ Create agenda ▪ Draft Charter, Work plan, Comms Strategy ▪ Host meeting | <ul style="list-style-type: none"> ▪ Invite attendees ▪ Provide feedback | <ul style="list-style-type: none"> ▪ Municipal staff leads | <ul style="list-style-type: none"> ▪ Clarify the objectives of the project ▪ Outline information needs ▪ Identify barriers to implementing work plan ▪ Approve Project Charter | Completed |
| Project Updates - ONLINE | <ul style="list-style-type: none"> ▪ Host meeting ▪ Update Work plan ▪ Report on progress ▪ Analyze feedback | <ul style="list-style-type: none"> ▪ Provide feedback ▪ Provide updates on any project supports | <ul style="list-style-type: none"> ▪ Municipal staff leads | <ul style="list-style-type: none"> ▪ Update Client on progress ▪ Ensure Client supports are in place where needed | Completed |
| Information Inputs -EMAIL or DROPBOX | <ul style="list-style-type: none"> ▪ Detail resource needs required (see Section 6) | <ul style="list-style-type: none"> ▪ Provide background documents, data, information, feedback, direction ▪ Request information from NWMO and other consultants | <ul style="list-style-type: none"> ▪ For MDB Insight review and analysis | <ul style="list-style-type: none"> ▪ Ensure client communicates input for consideration by MDB Insight | Requested |
| Input – Best Practices / Benchmarking Review, Other Reviews - EMAIL | <ul style="list-style-type: none"> ▪ Detail resource needs required (see Section 6) ▪ Review visioning exercise | <ul style="list-style-type: none"> ▪ Provide feedback ▪ Request information from NWMO and other consultants (e.g., understanding of the nature of programming and activities at the deep geologic repository (DGR) and the Centre of Expertise (CoE) that would attract people to visit the DGR and the associated CoE. | <ul style="list-style-type: none"> ▪ For MDB Insight review and analysis | <ul style="list-style-type: none"> ▪ Describe potential change in tourism demand ▪ Describe programs used in other communities to increase tourism ▪ Describe strategies that could be implemented in South Bruce so any increase in tourism resulting from the APM project is to the general benefit of the tourism industry in South Bruce. ▪ Identify strategies for expansion of the tourism industry in South Bruce to meet the change in demand that also preserve the unique natural and agricultural character of the community ▪ Consider connection to Indigenous history (Saugeen Ojibwa Nation) ▪ Consider worker housing becoming visitor accommodation / post-secondary connections – connection to housing / policy considerations | Requested |
| Discussion – Centre of Expertise (CoE) | <ul style="list-style-type: none"> ▪ Coordinate meeting ▪ Facilitate discussion ▪ Analyze feedback | <ul style="list-style-type: none"> ▪ Attend discussion with NWMO representatives ▪ Provide vision, ideas on | <ul style="list-style-type: none"> ▪ South Bruce ▪ NWMO | <ul style="list-style-type: none"> ▪ Consider other uses for the CoE (admin, training, etc.) ▪ Review other “centres” to stimulate discussion (also domestic OPG visitor centres) | Completed |

| Activity | MDB Insight Responsibilities | Municipality of South Bruce Staff Responsibilities | Target Audience | Rationale/Question(s) | Timing/ Status |
|--|---|---|--|--|----------------|
| | | potential facility, nature of visitors, spin-off opportunities for local businesses | | <ul style="list-style-type: none"> Determine the vision and features of the Centre of Expertise in South Bruce Provide criteria to shape how effective the CoE will be in attracting visitors Static vs active (demonstrations) Effect on community amenities, transportation | |
| Presentation – Interim Report - VIRTUAL | <ul style="list-style-type: none"> Present findings Analyze and incorporate feedback | <ul style="list-style-type: none"> Provide feedback | <ul style="list-style-type: none"> Municipal staff leads | <ul style="list-style-type: none"> Present findings to date and receive feedback Inform SOARR Analysis Inform Incremental Opportunity Analysis Inform potential alignments with other projects Prepare the process to develop a draft vision for the tourism industry in South Bruce and the region taking NWMO into consideration Set date and logistics for Workshop | Completed |
| Workshop – Tourism Industry Vision Development – Possibly IN-PERSON or VIRTUAL | <ul style="list-style-type: none"> Prepare presentation Facilitate workshop Analyze feedback | <ul style="list-style-type: none"> Invite participants Approve presentation Provide feedback | <ul style="list-style-type: none"> South Bruce Tourism Committee Key tourism operators Business organizations County tourism staff | <ul style="list-style-type: none"> Consider agricultural/rural character of the community Develop a draft vision for the tourism industry in South Bruce and the region taking NWMO into consideration | Completed |
| Submission of Draft Tourism Interim Report | <ul style="list-style-type: none"> Deliver Draft Tourism Industry Impact Recommendations | <ul style="list-style-type: none"> Provide feedback | <ul style="list-style-type: none"> Municipal staff | <ul style="list-style-type: none"> Incorporate into Final Tourism Impact Report Validation of directions in study | Completed |
| Draft Tourism Impact Study | <ul style="list-style-type: none"> Draft Report Analyze and incorporate feedback | <ul style="list-style-type: none"> Provide feedback | <ul style="list-style-type: none"> Municipal staff leads GHD | <ul style="list-style-type: none"> Incorporate feedback into Final Draft Intake for peer review | Completed |
| Peer Review Input from GHD | <ul style="list-style-type: none"> Receive Peer Review Input | <ul style="list-style-type: none"> Provide Peer Review Input | <ul style="list-style-type: none"> GHD | <ul style="list-style-type: none"> Input for final draft | Completed |
| Final Submission - Tourism Impact Study | <ul style="list-style-type: none"> Provide final report | <ul style="list-style-type: none"> Receive report | <ul style="list-style-type: none"> Municipal staff leads | <ul style="list-style-type: none"> Delivery of Final document | Completed |
| Presentation to CLC – Final Tourism Study | <ul style="list-style-type: none"> Present | <ul style="list-style-type: none"> Arrange meeting logistics | <ul style="list-style-type: none"> Community Liaison Committee | <ul style="list-style-type: none"> Complete project | Aug 2022 |

10. Number, location, employment, number of rooms, occupancy rates – hotels / motels, B&Bs, inns, resorts, campgrounds, RV parks, Provincial Parks, AirBnB and other short-term rentals
11. Number, location, and employment – restaurants, wineries, breweries, distilleries
12. Number, location, employment, and visitor numbers – major attractions, theatres, cinemas, bowling alleys, outdoor activity centres
13. Number, location, and visitor numbers – festivals and events, beaches and parks
14. Number, location, employment, number of vehicles – tour companies
15. Details of any marketing or promotional plans undertaken in South Bruce or Bruce County to promote investment and visitation in the tourism and hospitality sector
16. Details of sections within current emergency preparedness plans that address emergency measures and economic recover measures related to nuclear-related damage to tourism and hospitality in South Bruce or Bruce County

Information needed from other sources

1. Latest supply chain data for accommodation, food services, arts, entertainment and recreation for South Bruce and Bruce County (EMSI Analyst)
2. Copies of studies, reviews, or reports on the impact on tourism and hospitality by a Deep Geological Repository from any other jurisdiction in the world
3. Copies of any mitigation (emergency preparedness and business recovery), investment or marketing strategies for tourism prepared for communities near Deep Geological Repositories from any other jurisdiction in the world
4. Details and concept images of the proposed NWMO Centre of Excellence, with specific reference to features of the facility or property that will promote and support tourism and hospitality
5. Details about any other Centres of Expertise or centres of excellence anywhere in the world that are similar to what is proposed by the NWMO
6. Details of any traffic constraints or buffer areas that will be created anywhere in South Bruce or Bruce County related to the NWMO Deep Geological Repository
7. Details of any tourism-related constraints, closed roads, or buffer areas that were considered or created when a Deep Geological Repository was established anywhere else in the world
8. Details about any other Centres of Excellence anywhere in the world that are similar to what is proposed by the NWMO
9. Copies of any Tourism Industry/Business Impact Studies related to the development of a Deep Geological Repository was established anywhere else in the world
10. Examples of tourism businesses, roofed tourist accommodation or hospitality operations that opened, expanded, downsized or closed adjacent to a Deep Geological Repository was established anywhere else in the world

Report Outline

A report outline establishes the structure of the final report for the Municipality of South Bruce Tourism Study. The following table of contents serves as the starting point for the final product. This reporting structure can be discussed based on the Municipality of South Bruce's vision for the documents.

Draft Table of Contents – Tourism Study

1. Executive Summary
2. Current tourism industry
3. Potential changes in tourism demand with the development of the APM project
4. Examples of programs in other communities to address changes in tourism demand
5. Strategies to increase tourism

Appendix or Separate Technical Report

- a. Methodology
- b. Document Review
- c. Engagement Summary
- d. Summary of Reviews and Analysis
- e. Strengths, Opportunities, Aspirations, Risks, Results Assessment

Appendix B: Strengths, Opportunities, Aspirations, Risks, Results Assessment

| Strengths | |
|---|---|
| What can we build on? | |
| | Proximity to renowned attractions in the area |
| | Small town feeling - Community Spirit |
| | Family-run businesses –personalized interactions |
| | Natural beauty and resources |
| | High quality of life, engaged, supportive community |
| Opportunities | |
| What are they key areas of untapped potential? | |
| | Target drivers passing through to well-known tourism assets and redirect them to activities, services, accommodation, and dining experiences in South Bruce |
| | Strong potential to develop the identified emerging tourism assets into key tourism attractions, including agri/culinary tourism in partnership with local farmer groups and restaurants, increased investment in outdoor/recreation amenities and event-based tourism |
| | Offer private/calm alternatives to provincial tourist who dislike the over tourism near communities have experience. |
| | Further develop the relationship with regional tourism partners including Bruce County and RTO 7 to tab into their current efforts and allocate resources efficiently to create a multiplier effect |
| | Opportunities lie in leveraging funding from the South Bruce DGR project to ensure long-term tourism funding stability. |
| | Growth in Indigenous tourism – South Bruce could consider potential collaborations with Indigenous Tourism Ontario (ITO) and regional Indigenous communities on joint tourism development projects. |
| | introducing farms to the public through helping with farm events. |
| | Opportunities lie in leveraging funding from the South Bruce DGR project to ensure long-term tourism funding stability. |
| | As a training centre and a collaboration hub, The Centre of expertise could increase visitors in the area |
| | Street beautification – grants through Spruce the Bruce |
| | Immigration and temporary foreign workers remain a critical source of unskilled labour for tourism operators. There are opportunities for South Bruce to collaborate with Bruce County on a tourism worker attraction strategy that leverages this significant labour pool. Worker incentives (e.g., financial or perks) could be considered to attract labour. |
| | Surging demand for rural-based experiences, and reports of over-tourism within Bruce County and region, can also be viewed as an opportunity for South Bruce. South Bruce could funnel regional tourists locally by increasing product development and marketing and aligning promotional outreach during peak tourism seasons. |
| | Expand Visitsouthbruce.ca functionality to increase its utility for potential tourists. Some opportunities include map of regional tourism assets, half/full day itinerary trips, increased photo/video/written content that highlights the region. |
| | Opportunities exist to explore worker sharing agreements between larger tourism operators or regions that provide workers with expediated or guaranteed employment. |

| Aspirations | |
|------------------------------------|--|
| What do we want to achieve? | |
| | More accommodation places for visitors |
| | Modern and renewed downtown with extended hours of operations |
| | Strong offer from local restaurants and food trucks alternatives for events |
| | Municipal support for small businesses |
| | Engaged community, internal communication on events |
| | Accessible information about programs availability for residents, businesses and visitors |
| | Local businesses promoters (i.e. Local people have friends and relatives visit local tourist locations first). |

| Risks | |
|---|--|
| What challenges do we need to be aware of? | |
| | The potential arrival of the NWMO project could affect the industry as a nuclear facility may not be perceived as attractive |
| | Resistance to meet and embrace change and strangers coming into the area. |
| | Future tourism development requires dedicated funding and staff resources. |
| | The pandemic has highlighted long-term structural challenges associated with the tourism sector (e.g., poor transportation networks, highly concentrated demand in summer periods, inadequate compensation, etc.). |
| | Ongoing labour shortages are expected to continue to impact tourism and non-tourism businesses alike over the coming years. Consideration must be given to ensure affordable housing for tourism workers. |
| | Experiential and sustainable tourism requires entrepreneurial leadership, support from local government structures and long-term funding strategies – while meeting the needs and concerns of local citizens. |
| | Online events have transformed the way events are completed, there is need for strategic thinking when planning for the possible potential of events associated to the Centre of Expertise |

| Results | |
|--|---|
| What are the Key goals we would like to accomplish? | |
| | Become a recognized destination for rural-based experiences |
| | Develop a solid offer of experiential tourism through leveraging food and drink, outdoor activities and small-town atmosphere |
| | Capture passing tourists to provide them solutions through local businesses |
| | More accommodation places for visitors |
| | Develop a farm to table culinary offer by connecting farms to the public |
| | More tourism business support |
| | Promote agritourism by promoting locally made food products |
| | Introducing farms to the public through helping with farm events. |



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