



**Municipal Accommodation Tax
Association**

Situational Analysis Report

July 20, 2023

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INTRODUCTION

The Municipal Accommodation Tax Association (MATA) of South Bruce Peninsula in cooperation with Regional Tourism Organization – Region 7 ([RTO7](#)) contracted McQueen Galloway Associates (MGA) and Sierra Planning Consultants (SPC) to complete a 5-year Tourism Strategy and 1-year Action Plan. The Tourism Strategy fulfills MATA’s obligation under the Municipal Accommodation Tax (MAT) agreement with the Town of South Bruce Peninsula. MGA prides itself on developing tourism strategies utilizing a quantitative and qualitative evidenced based approach to formulating meaningful and responsive strategies. This report is not a tourism strategy. It is a collection of evidence that will assist in developing the tourism strategy.

The purpose of this “Situational Analysis” or “Findings” report is to assess the current situation regarding the variety of tourism related activity currently influencing the South Bruce Peninsula area. In essence, before an organization can determine where they need to go, they need to fully understand where they are. The report should be viewed as where MATA is positioned now within the context of tourism related agencies, policies, visitor profiles, tourism assets, and tourism operators in South Bruce Peninsula.

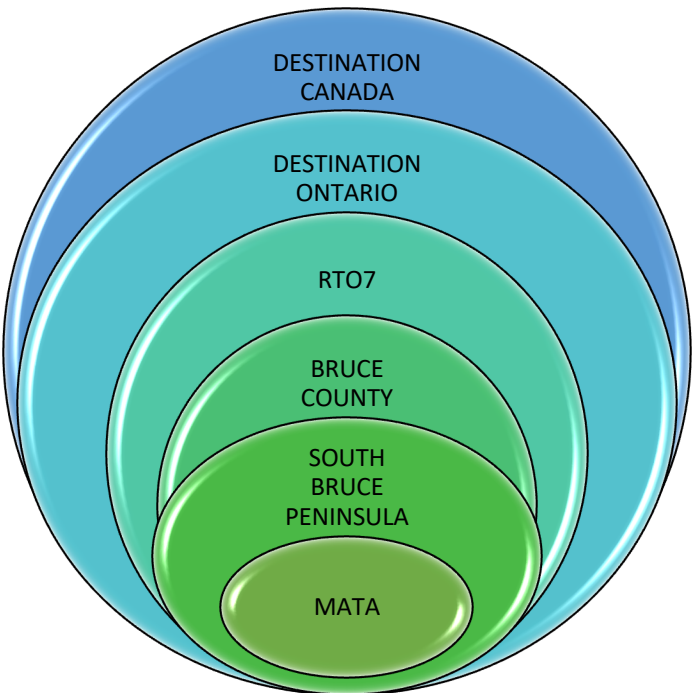
The report is structured in two fundamental structures. The first or main structure includes;

- ◆ **MAT - OVERVIEW**
- ◆ **MATA – Accountability Framework**
- ◆ **LITERATURE REVIEW – Key Findings**
- ◆ **TOURISM STAKEHOLDER/OPERATOR CONSULTATION – Key Findings**
- ◆ **SURVEY – Key Findings**
- ◆ **TOURISM ASSETS – Key Findings**
- ◆ **MAT COMPARATORS**
- ◆ **STRATEGIC THEMES**
- ◆ **SUPPORTING APPENDICES**

The second structure assumes that MATA will work within the provincial and regional hierarchy of tourism entities. That is to say that there are several tourism agencies that serve South Bruce Peninsula in whole or in part. The graphic below illustrates the existing tourism hierarchy in Ontario related to MATA.

It is important for MATA to know the extent to which the current tourism hierarchy is drawing potential visitors from an international, national, provincial, regional, and local context. In this report the hierarchy has been inverted and starts with the local situation and moves to the regional context.

Tourism Hierarchy



Pursuant to the Request for Proposal (RFP), this report also contains a section related to profiling three municipalities with experience in Municipal Accommodation Tax, including Kingston, Prince Edward County, and Quinte West. This section provides a profile of their history and experience with MAT as well as their current practices. A fourth comparator was subsequently introduced (Timmins), with an evaluation matrix to assess the distribution of MAT funding to tourism entities.

The report concludes with a series of “strategic themes”. These themes have been uncovered through analyzing the respective quantitative and qualitative findings from all aspects of the report. These strategic themes ultimately lead to determining MATA’s “Strategic Directions” and form the basis of the 5-year strategy.

GLOSSARY OF TERMS

Tourism Stakeholder – Short-term accommodators who collect MAT revenues from visitors and submit to the Town of South Bruce Peninsula.

Tourism Organization – Organizations who have a role, in whole or in part, supporting tourism efforts within South Bruce Peninsula or beyond but including South Bruce Peninsula.

Tourism Entity – A business, non-profit organization, or government who attracts visitors in whole or in part to their services.

Acronyms

2SLGBTQIA+	- 2 Spirit, Lesbian, Gay, Bi-Sexual, Trans-sexual, Queer or Questioning, Intersex, Asexual.
AADT	- Average Annual Daily Traffic.
DMF	- Destination Marketing Fee.
DMMO	- Destination Marketing & Management Organization.
DMO	- Destination Marketing Organization.
DMP	- Destination Marketing Program.
KAP	- Kingston Accommodation Partners.
MAT	- Municipal Accommodation Tax.
MATA	- Municipal Accommodation Tax Association.
MGA	- McQueen Galloway Associates.
NBP	- North Bruce Peninsula.
PEC	- Prince Edward County.
RFP	- Request for Proposal.
RTO7	- Regional Tourism Organization 7.
SBP	- South Bruce Peninsula.
SPC	- Sierra Planning Consultants.
STA	- Short Term Accommodation (Accommodator).
STAG	- Sustainable Tourism Advisory Group.
T3	- RTO7 T3 Accelerator Program.
TEDC	- Timmins Economic Development Corporation.
TK	- Tourism Kingston.
TODS	- Tourism Oriented Destination Signage.

MUNICIPAL ACCOMMODATION TAX- OVERVIEW

The Municipal Accommodation Tax (MAT) is a revenue tool that allows municipalities to support, promote, and grow tourism as an economic driver.

With the MAT generating revenue to support and promote local tourism, establishing a clear and transparent process of MAT funding distribution, project monitoring and evaluation is increasingly important. This applies to both eligible tourism organizations and municipal portions of MAT funding.

The following information has been extracted for the benefit of providing the reader with general facts associated with the Provincial legislation supporting MAT, as well as programs utilized prior to the most recent 2017 MAT Regulations. The historical reference is provided as some of the chosen municipal comparators have evolved from those historical programs which have shaped their current situations.

Municipal Accommodation Tax Facts

How Distribution of MAT Is Regulated?

- Introduced by the Ontario legislation in 2017.
- Over 50 Ontario municipalities have implemented MAT as of June 2023. The number of municipalities is increasing.
- Most municipalities implement a 4% tax (with a few exceptions, including Toronto 6% and Ottawa and Niagara on the Lake - 2%, etc.)
- MAT applies to short term or transient accommodation (less than 30 nights). MAT is applied to the accommodation charge only, other fees are not included (e.g., valet parking, laundry service or continental breakfast, etc.).

As a pre-cursor of MAT, a voluntary accommodation tax was implemented in some municipalities under Destination Marketing Programs (DMP). For example, Prince Edward County and Kingston implemented a voluntary Destination Marketing Fee (DMF) on transient accommodation charge in place before the MAT was introduced.

The implementation and administration of the accommodation tax is authorized under Section 400.1 of the Municipal Act and Ontario Regulation 435/17. With the Province of Ontario's passage of Bill 127, the Stronger Healthier Ontario Act, in 2017, municipalities can establish a by-law to collect an accommodation tax through providers of short-term accommodations.

To implement the MAT municipalities are to enact the MAT by-laws that determine and regulate the design of the tax.

MAT is implemented on short term transient accommodation (under 30 days). The types of accommodation subject to the tax exemptions are defined by the Ontario regulations and local by-laws (i.e., MAT by-laws and STA/transient accommodation by-laws). Beyond the Ontario Regulations, Municipalities have the power to further define what constitutes short term transient accommodation to determine the types of short-term accommodation MAT would apply to. Where a MAT by-law is in place the accommodation tax is mandatory and short-term accommodation providers are obligated to collect the tax from purchasers of accommodation and remit the tax to the municipality, or its agent.

The regulations direct the use of MAT funds:

Provincial regulations require municipalities to share the MAT revenues with one or more eligible not-for-profit tourism entities, whose mandate includes tourism promotion in Ontario or in a municipality.

Municipalities are required to make a payment of at least 50% of net MAT revenues to the eligible tourism entity.

MAT revenues are to be spent on promoting tourism and product development within municipalities.

The Municipality may also decide to collect the MAT internally and provide those funds directly to the Destination Marketing Organization (DMO) for the implementation of Destination Marketing Program (DMP).

To be eligible to receive a share of MAT funds, a tourism entity must be a not-for-profit organization whose mandate includes tourism promotion in Ontario or in a municipality (Ontario Regulation 435/17, Section1).

The MAT funds shared with an eligible tourism entity must be used for the “exclusive purpose of promoting tourism” (Ontario Regulation 435/17, Section 5(3)). Tourism promotion includes the development of tourism products (Ontario Regulation 435/17, Section1). To establish and enforce these conditions, municipalities and tourism entities enter into an agreement that sets out financial accountability matters to ensure that amounts paid to the entity are used for the exclusive purpose of promoting tourism.

What happens to MAT funds?

Direction regarding MAT revenue distribution is provided at the provincial and municipal level. The Municipal Act, 2001 requires municipalities that choose to implement a transient accommodation tax to share a portion of their revenues from the tax with an “eligible tourism entity.”

Municipalities allocate a portion of the total revenue for MAT administration purposes (examples include up to 10% of the total MAT revenue).

After that the net MAT revenue amount is allocated as per the Ontario Regulation 435/17 Transient Accommodation Legislation and the local MAT by-law:

50% municipality & 50% to one or more eligible tourism organization(s)

The regulations do not provide a definition for a “Destination Marketing Organization” (DMO) Eligible tourism entity.

Depending on the circumstances, this may be a Destination Marketing Organization, Regional Tourism Organization, or other not-for-profit tourism organization such as an economic development corporation. The amount to be shared, and with whom, would depend on whether there is an existing destination marketing program in the community.

- **Municipal Share of MAT Revenues (50%)** Municipal accommodation tax regulations under the Municipal Act, 2001 do not address, or limit in any way, how a municipality may use or spend revenues from a transient accommodation tax.
- The regulations do not require a municipality to spend MAT revenues in the year following the collection. Decisions on how to spend the municipal portion of MAT revenue is at the discretion of the municipality. For example, a municipality can use revenues from a tax to contribute to a reserve or to an infrastructure project.
- Municipal Councils make decisions on allocation of a municipal share of MAT revenue allocation to tourism and other tourism related projects in the process of the annual budget development, through motions to support an event or an initiative, or by establishing a special committee.
- The sharing formula does not prevent municipalities from dedicating more than the required amount to tourism activities. Other purposes should be related to tourism

promotion but may include infrastructure projects such as affordable housing, road repairs, etc.

Share of an eligible tourism entity (50%)

The remaining 50% is to be used for destination promotion and development administered by one or more eligible non-profit tourism entity or entities with a mandate to promote tourism in a municipality or in Ontario.

The amount allocated to an eligible tourism entity is calculated as 50% of MAT revenues minus the municipality's reasonable costs of collecting and administering MAT.

The non-municipal share of MAT should be paid within 60 days after the end of the fiscal year (Ontario Regulation 435/17, Sections 5(2, 4, 5)).

- The regulations also require a municipality and tourism entity to enter into an agreement that deals with reasonable financial accountability matters to ensure that amounts paid to the entity are used for the exclusive purpose of promoting tourism. The agreement may provide for other matters. (Ontario Regulation 435/17, Sections 6(1)).
- Additionally, examples of eligible tourism entities include economic development corporations, which meet the eligibility criteria under the MAT regulations. Northeastern Ontario municipalities use this approach to reduce duplication of effort and resources (examples include Thunder Bay, Greater Sudbury, City of Hearst, and Timmins).

A municipality can decide to share more than the minimum amount of MAT revenue with a tourism entity. How this portion of funding will be spent is a subject of the negotiation between the tourism entity and the municipality. All conditions should be clearly defined in the agreement between the signing entities.

The Municipal Accommodation Tax regulations do not govern municipal decisions to fund the local tourism sector above and beyond the sharing requirements set out under the transient accommodation tax regulations.

Municipalities with a pre-existing destination marketing program that implement a tax are initially required to share an amount that matches the revenues collected on short term accommodation in the municipality and received by the relevant not-for-profit tourism organization under a destination marketing program from accommodations in the municipality, in respect of the fiscal year before the transient accommodation tax came into effect.

Tax revenues shared with an eligible tourism entity must be used by the DMO or tourism entity for the **“exclusive purpose of promoting tourism”** (which includes the development of tourism products).

MUNICIPAL ACCOMMODATION TAX ASSOCIATION (MATA)

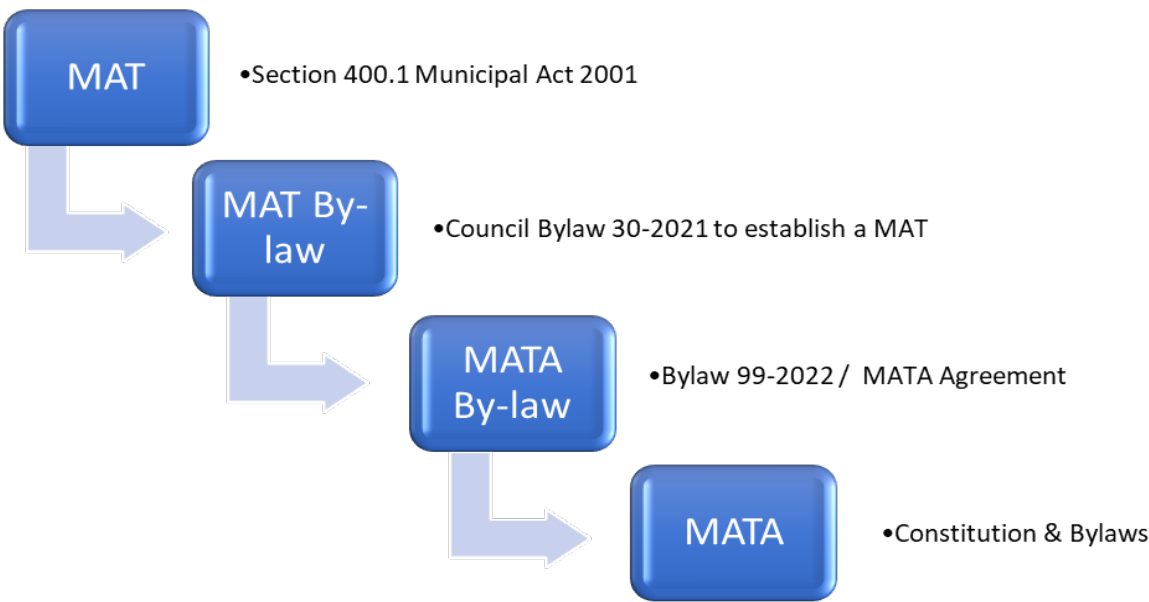
Accountability Framework

The following section outlines the current accountability framework that MATA is operating within. The Town of South Bruce Peninsula implemented a Municipal Accommodation Tax pursuant to Section 400.1 of the Municipal Act 2011, which permits municipalities to establish a MAT consistent with provincial regulations governing the Act.

As required under the Act, the Town of South Bruce Peninsula approved a by-law to establish a Municipal Accommodation Tax in 2021. In 2022, the Town of South Bruce Peninsula passed a by-law approving the Town enter into an agreement with MATA as the designated tourism entity as required under the Act (O. Reg. 435-17).

MATA must operate within the current three-year agreement and within its constitution and by-laws formulated therein.

Figure 1: MATA Accountability Framework



MATA - The Municipal Accommodation Tax Association is governed by a cross section of tourism representatives who have developed the following Vision, Mission, and Core Values.¹

Our Vision

To have the Town of South Bruce Peninsula as a four-season Tourism destination of choice in Ontario.

Our Mission

To work with our tourism stakeholders to build, sustain and grow tourism in the Town of South Bruce Peninsula through investment and education.

Core Values

Collaborative, Transparent, Trustworthy and Accountable to our Tourism Stakeholders.

¹ [South Bruce Peninsula MATA | RTO7](#)

MATA's Board of Directors:

- Robert Trask, Chair, Chesley Lake Camp
- Betty Ann (George) Knight, Vice-Chair, Airbnb Owner & Scotiabank
- Donna Harb, Secretary/Treasurer, Sauble Beach Chamber of Commerce, Realtor
- Lisa Gow, Carson's Camp
- Kim Follis, Financial Advisor
- Mitch Grant, Sauble Cottage Rentals & Unique Pieces Retail
- Evan Baulch, Sauble Beach Chamber of Commerce, Heydays Restaurant, June Motel

MATA - Tourism Strategy & Action Plan

Pursuant to Section 4, Sub-Sections 4.1 through 4.5 of the Town's Agreement with MATA, they are required to develop a 5-year "Tourism Master Plan" to address the following Strategy, Objectives and Outcomes;

4.0 Strategy, Objectives and Outcomes²

4.1 - To assist with the growth of the tourism sector of the Town's local economy and to ensure that the Town becomes the tourism destination of choice in Ontario, the parties hereto agree that within 18 (eighteen) months of the execution of this agreement, MATA shall create a Tourism Master Plan.

4.2 - The Tourism Master Plan will include a long-term vision for the Town's tourism sector that considers and aligns with the Town's Strategic Plan and Economic Strategy.

4.3 - The Tourism Master Plan will provide MATA with priorities and objectives to be used on growing the tourism sector in the Town of South Bruce Peninsula.

4.4 - The Tourism Master Plan will be updated at least once every five (5) years.

4.5 - The funds shall be used in the pursuit of the following and related objectives and outcomes:

4.5.1 achieving the objectives identified in the Tourism Master Plan;

4.5.2 increase visitation to the Town;

4.5.3 enhance the Town's national and international profile;

4.5.4 support tourism product development and industry growth in the Town;

4.5.5 fund bid requirements for major events without additional funding from the Town;

4.5.6 to become more competitive with other provincial and national cities in Canada;

4.5.7 increase shoulder season tourism and offerings; and

4.5.8 where applicable, supporting the priorities that are set by the Town and the County of Bruce.

LITERATURE REVIEW

Pursuant to the deliverables contained in the RFP, a literature review was completed on the following prescribed reference documents.

² Excerpt from MATA Agreement with the Town of South Bruce Peninsula – Appendix B

SOUTH BRUCE PENINSULA

- South Bruce Peninsula 5-Year Economic Development Strategy
- Hotel Resort Feasibility Study & Marketing Pitch Kit
- Sauble Beach Growth Strategy

BRUCE COUNTY

- Economic Impact of Tourism Report (2018/2019)

REGIONAL TOURISM ORGANIZATION – REGION 7 (RTO7)

- Downtown Wiarton Community Profile 2022
- Sauble Beach Tourism Data
- RTO7 Business Plan (2023/24)
- RTO7 Wayfinding Standards & Specifications (2021)
- RTO7 Sustainable Tourism Newsletters (2023)
- Wiarton Tourism Data (2023)

OTHER

- Wasaga Beach Tourism Destination Management Plan (2018)
- Saugeen Shores Tourism Strategy (2019)
- Northern Bruce Peninsula Sustainable Tourism Management Plan (2018)

To synthesize the information contained in the literature review, the consultants have extracted key points of reference in each document. To further summarize the information the consultants have concluded key findings from each data source. The following section will list those key findings from each data source.

SBP Economic Development Strategy- FINDINGS

- The Town has a vested interest in tourism as a significant driver to its economic development goals.
- The Town of South Bruce Peninsula's Economic Development Strategy contains a Strategic Priority – "Increase Tourism Development".
- The Actions contained in the Town's Economic Development Strategic Plan are directly aligned with MATA's overarching objectives.
- The Town's Strategy identifies a total capital budget amounting to \$50,000 for tourism activities over 5 years (currently unfunded).
- One of the strategic actions relates to allocating the Town's 50% of the MAT revenues to tourism development.
- The Town funds the seasonal visitor centre at a cost of approximately \$20,000 annually.
- The Town and the County cost share a transit service to Sauble Beach from May to Labour Day.
- The MATA Board has suggested that the Town delegate all the actions contained in their Strategic Priority related to Tourism development to MATA. Recognizing that there are several aligned studies underway, the exact distributions of roles and responsibilities could be reviewed in early Fall, 2023. This will allow for the completion of the County's review of "who does what" related to tourism in the County, including SBP. It will allow for the completion of the MATA Tourism Strategy and one-year action plan. A review at this time could provide for improved allocation of resources, opportunity to leverage all funding sources, and enhanced communication between organizations sharing a similar goal for strengthening tourism and economic development in South Bruce Peninsula.
- Town's Economic Development Strategy. - *"As an area most notably known for its tourism assets and experiences, South Bruce Peninsula should continue to increase its*

local tourism development. This is a necessary step in further diversifying the number of experiences during the height of the summer season, but also to increase the number and types of tourism experiences during the shoulder and off-season.”

Bruce County- FINDINGS

- Bruce County produces a highly informative annual study on the economic impact of tourism which includes data on counts, spending, and visitor demographics, and business.
- The rank order of preferred visitor accommodations is consistently (i) private homes, (ii) camping, (iii) rental cabin/cottage, (iv) hotel/motel in private, (v) Airbnb, (vi) Bed & Breakfast.
- There is a consistent high degree of satisfaction among visitors to Bruce County
- The County’s Spruce the Bruce program provides funding to business for the following areas: Façade Improvement, Perpendicular Signage. Awnings, Community Marketing, Community Signage, Streetscape Beautification, Destination Infrastructure & Active Transportation, Fascia Signage, Patio Installation, Business Accessibility Adaptability, Product and Experience Development Grant, Agri-food Innovation Grant, Residential Improvement Grant.

RT07 – FINDINGS

- The RTO7’s Mission and Vision is aligned with MATA’s objectives and recognizes MATA and all tourism stakeholders within Bruce, Grey, and Simcoe Counties.
- RTO7 has adopted a “Sustainable Tourism” pledge and has a link to the Tourism Industry Association of Ontario (TIAO) toolkit to assist tourism partners.
- As part of the RTO7 2023/24 Business Plan, RTO7 acknowledges that there are 5 key challenges to the Tourism Industry in Region 7;
 - Reliable Workforce
 - Stakeholder Debt Load
 - Addressing Sustainable Tourism
 - Implementation of Technology
 - Reliable and consistent data
- RTO7’s challenges have been assessed as;
 - Stakeholder Fatigue,
 - Stakeholder Debt,
 - Limited Resources to serve large stakeholder base,
 - Year-over-Year Stability of RTO Program.
- RTO7 has several Partnership Programs to support tourism stakeholders including;
 - Tourism Wayfinding,
 - Product/Experience Development,
 - Video/Image Production,
 - Digital Advertising,
 - Social Media Advertising,
 - Translation Services,
 - Storytelling,
 - Recruitment Video/Image Development
- In addition to the Partnership Programs, RTO7 offers marketing support, extensive training programs, the T3 Accelerator (mentorship) programs, etc.
- RTO7’s Budget has allocated greater resources to “workforce development/Training” and “Product Development”, and reductions in “Partnership Programs” and “Marketing”.
- RTO7 uses Environics Analytics to gather visitor information.

- Geofencing reports are more challenging to understand.
- Geofencing report for Wiarton indicated a reduction of traveller numbers in all seasons between 2019 and 2021. Traveller numbers were also very consistent from season to season in 2021 compared with 2019.
- Facebook and YouTube are the most popular social media platforms used by visitors (70%+).
- There are no overwhelming differences between the Visitor Profile between Wiarton and Sauble Beach for annual daily visits.
- RTO7 has wayfinding standards and offers a “pay to play” for Tourism Stakeholders to maintain a consistent “look and feel” to guide visitors.
- The Town of South Bruce Peninsula appears to be the largest supporter of the “pay to play” wayfinding signage program. (See APPENDIX A)
- RTO7 data derived from Environics Analytics, offers tourism entities the top five “types” of visitors (Visitor Profile) who are attracted to SBP.
- The visitor profiles between Sauble Beach and Wiarton are very similar (as per RTO7 Environmental Analytics reports). However, Sauble Beach does have a higher representation of suburban, middle-aged, and multi-ethnic families.
- The table below reflects the top 10 unique visitors (in descending order) from their place of origin. Unique visitors are those that live beyond 40 Kilometers. The location that are bolded represent those areas whose visitors are under-represented in SBP, meaning that there are fewer visitors from these locations per population than other visitor destinations.

SAUBLE BEACH UNIQUE VISITORS (+40 KLMS)	WIARTON UNIQUE VISITORS (+40 KLMS)
Toronto	Toronto
Guelph	Kitchener
Kitchener	Brockton
Cambridge	Meaford
Hamilton	Hamilton
Mississauga	London
Brockton	Mississauga
London	Guelph
Brampton	Hanover
Waterloo	North Wellington

Wasaga Beach Tourism Destination Management Plan- FINDINGS

- Introduces a change in the traditional tourism model of focussing on the “supply side” of what a destination has to offer, and more focus on the “demand side”.
- Focus on the “demand side” requires tourism entities to better understand what visitors are looking for in their experiences and speaking to their interest (as opposed to promoting supply).

Saugeen Shores Tourism Strategy – FINDINGS

- Defines three fundamental roles for a Destination Management Organization including (i) Marketing, (ii) Managing & Supporting local tourism offerings, (iii) Coordination of tourism stakeholders.

Northern Bruce Peninsula Sustainable Tourism Management Plan – FINDINGS

- Completed a sustainable tourism strategy in 2018 in a collaborative manner and developed 4 key pillars:
 - Strategy 1: Community and Industry Engagement: This pillar is designed to effectively communicate the direction, management, and performance measurement of the tourism plan with all key stakeholders in NBP.
 - Strategy 2: Product and Experience Development: This pillar is designed to refine and develop NBP's product and experience offerings including in shoulder seasons and new areas as well as build capacity with local operators to deliver tourism experiences.
 - Strategy 3: Investment and Asset Development: This pillar is designed to secure stable funding for the plan initiatives as well as manage existing tourism infrastructure and develop new tourism assets.
 - Strategy 4: Sustainability Positioning and Destination Branding: This pillar is focused on the promotion, marketing, and communication (to consumers and the travel trade) of Northern Bruce Peninsula's tourism brand experience.
- The Sustainable Tourism Advisory Group (STAG) Committee is represented by Municipality of Northern Bruce Peninsula (Staff & Councillors) • Bruce County • Parks Canada • Ontario Parks • Saugeen Ojibway Nation • Regional Tourism Organization 7 • Bruce Trail Conservancy • Tobermory and District Chamber of Commerce.
- STAG Mission - "As a networked group of stakeholders in the regional tourism economy, the Sustainable Tourism Advisory Group will work collaboratively across organizations, to leverage resources, to share expertise and to implement the principles and practices of sustainable tourism management."
- STAG's vision is "to develop a thriving, collectively managed tourism economy on the Northern Bruce Peninsula, whereby: • effective collaboration exists between the business community and local/ regional government and non-government organizations that hold a mandate for sustainable tourism.
- The work of STAG is divided into three working groups including (1) Communications, (2) Infrastructure, and (3) Capacity Management.

[NBP Sustainable Tourism Management Plan June 22 \(rto7.ca\)](https://www.rto7.ca/NBP-Sustainable-Tourism-Management-Plan-June-22)

NATIONAL & PROVINCIAL TOURISM TRENDS

In Canada, demand for travel and tourist experiences is on the rise, primarily driven by domestic travel and markets. During the pandemic domestic tourism substituted much of international travel due to travel restrictions, safety, and health concerns. This trend has continued after travel restrictions were gradually lifted. Today's uncertainties include health concerns, cost of living and inflation, and new geopolitical risks ([Destination Canada, 2022](#)). This national trend is true in Ontario.

A summary of tourism trends in Canada and Ontario

- **Increase in domestic and local tourism** - Concerns about health and personal finance have contributed to the increase in domestic and local travel.
- **Increased interest in responsible tourism** – Travelers are more mindful of environmental sustainability, social diversity and the impacts of tourism on local communities.
- **Increased interest in outdoor activities and experiences** - The trend has continued since the increase in outdoor activities during the pandemic due to indoor capacity restrictions, health and safety concerns.
- **The digital shift** - The tourism sector has been adapting to digital enhancements made during the pandemic. This includes innovative approaches to marketing (e.g., digital marketing, data-driven decision-making, and digital user experience-based product design).
- **Sports tourism trends** include increased domestic and shorter-distance travel, building local capacity for sports participants, and planning multi-use facilities (higher capacity, energy and cost efficient) to offer benefits to sport participants and communities.

Spending potential of Canadian households has been fluctuating. During the COVID-19 crisis the level of household savings was higher than in the pre-pandemic years. However, new crises and uncertainties (such as high inflation and cost of living) may have negative effects on household savings and on willingness to spend on travel and tourism. The increasing costs of travel (due to increase in prices for transportation, hotel accommodation, and food) many households continue to be cautious about health and spending on tourism and travel. In the next few years, tourism demand will depend on household income and ability to save for travel, and prices for tourism services and products.

The industry has been changing. The labour pool in tourism, travel, entertainment, and related sectors became smaller during the pandemic. As the industry recovers, this creates opportunities to offer employment and increase the number of jobs. This trend can be especially relevant to local communities as domestic and local tourism has been on the rise.

Affordability: New uncertainties such as the cost of living and inflation create concerns for personal finance and affordability of tourism. The trend is diversifying tourism products and making it easier for tourists and visitors to find “products and destinations that suit their budgets, schedules, and needs.” (Ontario Tourism Economic Recovery Ministerial Task Force, 2021). The tourism industry participants have been diversifying their products and marketing to reach out to tourists of different ages, abilities, economic, social, and ethnic backgrounds.

Tourism products vary from free events (weekend festivals and markets) to affordable packages (including family friendly deals and weekend getaways) to luxury tours.

Demand for Healthy and Safe Travels: Increase in Domestic and Outdoor Tourism

Increasing demand for healthy and safe tourism options. Domestic/ local and outdoor tourism have been on the rise. Demand for shorter-distance travel and outdoor activities has been growing as travelers seek destinations and activities perceived to be healthy and safe. Importantly, nature and outdoor experiences are part of the solution to physical and mental health challenges. There is an opportunity for the tourism industry to capitalize on this increased interest and attractiveness of the outdoors.

While many tourists seek outdoor activities to stay physically active (e.g., running, hiking, cycling, etc.); many others are looking to engage with the natural world, seeking easy day trips, parks or trails where people of all ages, abilities, and backgrounds can leisurely enjoy the nature. Urban centres that offer opportunities for leisurely walks, enjoying downtowns and local communities, waterfront trails or urban trails and parks provide opportunities for improving health and quality of life in an equitable manner, without discriminating by age or ability.

Responsible & Sustainable Travel:

Responsible travel means travelers are increasingly mindful of impacts of tourism on destinations, communities, and the environment. Consumer research demonstrates growing support for responsible travel. Travelers are increasingly inclined to reduce carbon emissions (including from long-distance travel), support local communities and economies, and support environmental conservation (2021 Canada Key Market Trends Report).

The responsible tourism trend has a potential to contribute not only to economic prosperity but also to socio- cultural and environmental net benefits to local communities. The development of local tourism opportunities is supported in Canada's Tourism Strategy (2019). One of the main priorities in the strategy is supporting and promoting *onsite experience destinations and culinary/farm-to-table tourism*. Onsite experience development examples include breweries, wineries, farms, fisheries and maple syrup farms. Farm-to-table and culinary tourism projects may include culinary trails, Indigenous culinary experiences, food festivals and farmers' markets. These businesses, events, activities, and destinations contribute to more sustainable local travel and attract both domestic and international tourists.

Provincial governments have supported and encouraged local tourism. For example, in 2021, the Province of Ontario introduced the Staycation Tax Credit (January-December 2021) to support local tourism to contribute to the provincial market and economic recovery of local communities. This incentive also encouraged more environmentally sustainable shorter- distance travel.

Social Change

Diversity, Equity and Inclusion – The tourism industry has been increasingly embracing principles of diversity, equity and inclusion of BIPOC and 2SLGBTQIA+ communities. These principles are one of the pillars of the Canada Tourism Strategy and among the key principles highlighted by the Ontario Tourism Ministry and RTO7.

The Canada Tourism Strategy (2019) sets out three principal areas: building tourism in communities, attracting investment, and promoting public-private collaboration.

The strategy of **Building tourism in communities** recognizes that all communities have the potential to be a tourism destination and sets out five priority categories:

1. *Winter and shoulder-season tourism* – to provide more reasons to visit in off-peak periods. More tourist visits from November to April.
2. *Rural and remote tourism* – to entice tourists to lesser-known parts of the country.
3. *Farm-to-table and culinary tourism* – projects like culinary trails, Indigenous culinary experiences, food festivals and farmers' markets, as well as onsite experience development such as breweries, wineries, farms, fisheries and maple syrup producers.
4. *Indigenous tourism* – to help Indigenous peoples and communities present their unique histories, traditional stories, creative arts and contemporary values.
5. *Inclusive Tourism* – to expand 2SLGBTQIA+ diversity training and market readiness programs, and support events celebrating diverse backgrounds and identities.

Supporting the Indigenous tourism industry - The Indigenous Tourism Association of Canada (ITAC) identified significant negative effects of the pandemic on indigenous tourism. Indigenous tourism operators include the independent sole-proprietors to the not-for-profit heritage associations, and community-based organizations. Provincial/Territorial Indigenous partners are encouraged to continue to engage with Indigenous stakeholders to design policies and support ([ITAC Report 2021](#)).

Engaging with and supporting BIPOC communities in developing tourism opportunities and businesses. The Canada Tourism Strategy supports investments in diversity training, expanding 2SLGBTQIA+ market readiness programs, and supporting inclusive programming.

Digital Shift

Rapid digitization, accelerated by the pandemic, creates both new opportunities and challenges for travel and tourism service providers. Tourism service providers increasingly require a virtual presence and digital marketing to engage with different audiences. They are expected to understand trends, personalize experiences and advertisement messages. This digital shift within the industry requires more sophisticated approaches to marketing focused on content and brand purpose.

Sport Tourism Trends

The sport tourism industry relies on and contributes to local, regional and national economic development initiatives. Sport tourism and the hosting of sport events have social, economic, and sustainability impacts on local communities. Competitors, spectators, and other participants in sport events (including athletes, teams, coaches, officials, etc.) bring significant tourism spending to a host community and region. Based on Statistics Canada Travel Survey 2018 data, the average spend per sport tourism visit in Canada was \$302 per visitor. The average Canadian sport tourism visitor spends \$145 on a same day visit and \$547 on an overnight visit. The average estimated spend for international visitors is from \$775 per visit for a U.S.-based visitor to \$2,033 per overseas visitor per stay. ([Sport Tourism Canada, 2021](#))

Trends in the sport tourism industry in the post-pandemic years are like general tourism trends in ensuring safety of all participants, planning, and operating local venues and events, the rise of individual and outdoor sports, re-thinking approaches to indoor facilities development and management, the digital shift and options for remote training, meetings, consultations, and work.

Individual and outdoor sports on the rise

Safer compared to team sports in the context of the pandemic, individual and outdoor sports have been more resilient and faster to recover. Outdoor sports such as cycling, running, pickleball, tennis, golf, skiing, skating, boating, etc. offer natural safety measures, additional mental and physical health benefits and have been gaining in popularity. This greater interest in outdoor and individual activities offers new opportunities for sport and recreation providers.

Shorter Travel Distances - More Local and Regional Events

More athletes and teams are playing in their home region or neighboring regions, compared to years before the pandemic. This trend emerged during the pandemic due to health and safety concerns and travel restrictions. Locally owned and operated events offer more flexibility (e.g., fewer technical, organizational, and other requirements and can be adapted to smaller groups) and less dependence on national and other events. Consequently, recruiting and marketing efforts for various events are likely to focus more on the regional markets and explore local and regional partnership opportunities to fund and organize events.

Re-Thinking Sports Facilities

Shorter travel distances and potentially more regional/local events require facilities. Many publicly funded and managed venues have been planned or converted to accommodate multiple uses, reduce operating costs, and offer more options and higher capacity. Responding to an increased demand for outdoor activities, some sports facilities and parks were used for non-sports purposes (e.g., gatherings, concerts, community spaces and meeting rooms, etc.). Municipalities in Canada and Ontario were forced to re-think the use of sports facilities and explore partnership opportunities to offer services to respond to the needs of their communities and increase return on investments.

TOURISM ASSETS

The following section is intended to illustrate a cross section of information. First, it should be stated that South Bruce Peninsula has a variety of tourism assets that serve a wide variety of interests and visitor ages, including families. With that said, there does not appear to be a central source that offers a complete inventory of tourism assets by asset type, such as:

- (i) Accommodations,
- (ii) Activities,
- (iii) Destinations,
- (iv) Events,
- (v) Dining,
- (vi) Shopping.

There is a hierarchy of organizations that have a vested interest in tourism promotion that ranges from local areas such as the local Chambers of Commerce, Town-wide promotions such as the Town of South Bruce Peninsula, and regional tourism standpoint such as Bruce County and RTO7 – Bruce/Grey/Simcoe.

The consultants have purposely looked at what organizations are promoting on-line given that visitors and potential visitors are most likely to search online for information. Collateral tourism promotional products are also helpful once visitors have come to the area.

The following section illustrates what tourism assets are promoted online by each organization (follow links) and how they are promoted by category. Observations on each website and its characteristics are noted.

Sauble Chamber of Commerce

Motels, Campgrounds, Cottages Activities Dining Shopping Events	Where to Stay Archives - Sauble Beach, Ontario Where to Play Archives - Sauble Beach, Ontario Where to Eat Archives - Sauble Beach, Ontario Where to Shop Archives - Sauble Beach, Ontario Upcoming Events – Sauble Beach, Ontario
---	--

- Prominent on the main page.
- Focus on Sauble Beach Entities.
- Features Members.
- Lists Non-Members.
- No weblinks to entities.

Warton Chamber of Commerce

Main Page	Warton and District Chamber of Commerce - Events (wartonchamber.ca)
Activities	Warton and District Chamber of Commerce - Things To Do (wartonchamber.ca)

- Not Prominent on the main page.
- Limited information – things to do.
- No links.

Town of South Bruce Peninsula

Main Page – Menu Tab Explore & Play	Explore and Play - South Bruce Peninsula
-------------------------------------	--

Tourism Tab	Tourism - South Bruce Peninsula
-------------	---

- Prominent on the main page – Explore & Play.
- Focus on SBP.
- Tourism listed as a tab.
- Links to entities – map of locations.
- No weblinks to entity websites.

Bruce County

Main Page Activities Towns to Explore Places to Stay <div>Hotels, Motels, Hostels</div> <div>Bed & Breakfast</div> <div>Cabins & Cottages</div> <div>Campgrounds</div> Trails by category of walking, hiking, cycling, canoe/Kayak, winter, ATV.	Homepage - Explore The Bruce Bruce County Things to Do - Explore The Bruce Bruce County Towns to Explore - Explore The Bruce Bruce County Places To Stay - Explore The Bruce Bruce County Hotels, Motels and Hostels - Explore The Bruce Bruce County Inns and Bed and Breakfasts - Explore The Bruce Bruce County Cabins and Cottages - Explore The Bruce Bruce County Campgrounds - Explore The Bruce Bruce County Bruce County Trails - Bruce County Trails
---	--

- Prominent on the Main Page.
- Focus on Bruce Peninsula.
- Main tabs for each category of accommodations, activities, towns, resources for visitors.
- Link to interactive map that shows locations of entities.
- Pop-up entity names on interactive map.
- Limited weblinks to entities.

RTO7

Home Page Industry Event Resources Link to Bruce Grey Simcoe Registration Bruce/Grey/Simcoe Lake Huron/Sauble Beach Link to County Website Link to Town of SBP- Explore & Play	Home RTO7 Events RTO7 South Bruce Peninsula MATA RTO7 brucegreysimcoe.com/bgs-services/OperatorRegistration/Default.aspx BruceGreySimcoe - Home BruceGreySimcoe - Lake Huron / Sauble Beach Homepage - Explore The Bruce Bruce County Tourism - South Bruce Peninsula
---	--

- Home Page is not intuitive to find tourism assets.
- MATA listed under “Resources” third layer.
- Bruce/Grey/Simcoe main page (2nd layer) has “Great Places”.
- Great Places showcases Sauble Beach/Lake Huron (3rd Layer)
- Sauble Beach/Lake Huron (4th layers) has links to Explore the Bruce, South Bruce Peninsula, Sauble Beach parking.
- No weblinks to tourism entities.

Tourism Asset Online Marketing- FINDINGS

- RTO7 – Bruce/Grey/Simcoe does not readily inform online viewers what South Bruce Peninsula has to offer, and focus is on Sauble Beach/Lake Huron.
- Explore the Bruce offers direct access to tourism assets/ by asset category. Interactive mapping is intuitive and takes potential visitors to a geographical location.
- There is some coordination of linking tourism organizations within the organizational hierarchy.
- There are limited website links to the actual tourism entities which draws the search to an end.

Tourism Oriented Destination Signage (TODS)

One of MATA's primary tourism competitors are visitors traveling to Northern Bruce Peninsula to enjoy the many demand generators and unique tourism assets. This issue was noted by MATA and tourism stakeholders who have expressed frustration or the opportunity to attract visitors going to Northern Bruce Peninsula to be diverted to South Bruce Peninsula.

Considering this issue, preliminary commentary reflects the current situation and respective challenges/opportunities.

Highway #6 Annual Average Daily Traffic (AADT)

According to the Ministry of Transportation's most recent traffic volume data (2019)³ the Annual Average Daily Traffic on Highway #6 North leading into South Bruce Peninsula at Concession #5 was measured at 7,250. The daily traffic volume reduced to 2,950 north of SBP at Miller Lake. A more fulsome listing of AADT's along Highway #6 is illustrated in APPENDIX B.

Recognizing that these traffic counts do not specifically address seasonal values, it does suggest that a significant volume of daily traffic (4,300) remains in the South Bruce Peninsula area. This suggests that there is a 60% capture rate of north bound traffic, or 40% of traffic volume goes on to Northern Bruce Peninsula. This leaves a good margin of potential visitors that could be attracted to SBP.

Tourism Oriented Destination Signage (TODS)

TODS signage is a widely known marketing program that offers a consistent and uniform standard that all travelers have become familiar with. Whether you are a daily commuter or a potential visitor to an area TODS signage captures high volumes of daily traffic. First-time visitors come to rely on TODS signage (along with their GPS) to welcome and direct them to their destination. TODS signage also serves to peak curiosity among travelers and may influence a future visit.

The following is an excerpt from the TODS website.

"Since 1997, Canadian TODS Limited has been responsible for the administration and operation of Ontario's Provincial Tourism-Oriented Directional Signing Program for Ontario's Ministry of Heritage, Sport, Tourism, and Culture Industries as well as the Ministry of Transportation."

³ [Theme.aspx \(gov.on.ca\)](https://www.gov.on.ca)

We offer a complete “turnkey” approach where we are responsible for all marketing, administration, operational needs, and general oversight. We maintain a central office with full-time staff who work solely on this signing program.

Throughout our history, we have remained committed to the three (3) groups of customers who must be satisfied with our service: the Transportation Agency to whom we report, the participating businesses, and, ultimately, the motorists who rely on the information we provide to make their travel safer and more efficient”.

We note that there is some use of TODS signage by individual tourism entities along Highway #6, however given the number of tourism assets there appears to be under-representation of TODS signage for a tourism destination.



TODS Marketing (HWY #6)- FINDINGS

- The Town’s current capture rate of annual daily traffic is estimated at 60%, leaving 40% of vehicular traffic going beyond South Bruce Peninsula.
- There is limited presence of TODS Signage on Highway #6 for SBP tourism entities.
- The RTO7 wayfinding signage standards are complementary to the TODS signage standards.

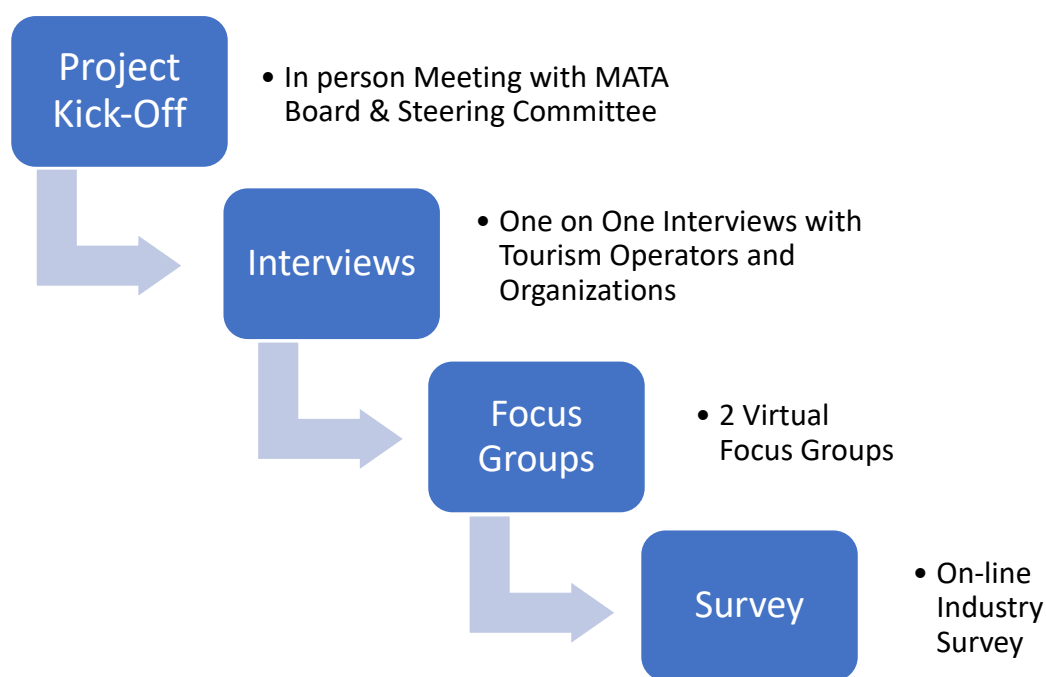
STAKEHOLDER CONSULTATION SUMMARY

Engagement Strategy

The overall engagement strategy consisted of a multi-layered approach to gather meaningful and consecutive information from a variety of tourism entities. These entities consisted of a cross section of Short-Term Accommodators who collect and submit the MAT, tourism operators, tourism supporting businesses, and organizations with a vested interest in promoting tourism. It included a combination of in-person, telephone, and virtual groups sessions, one-on-one interviews, and focus group sessions.

Each phase of the engagement process serves to inform increasingly pointed questions to uncover common issues impacting tourism entities in South Bruce Peninsula. These common issues were presented back to tourism operators through a survey instrument designed to validate information collected from the consultation process.

The engagement process results in the qualitative evidence that will inform the tourism strategy for MATA and complements the quantitative data presented in previous sections of the Situational Analysis Report.



Kick-Off Meeting MATA & Project Steering Committee

In the first phase of the engagement plan, the focus was primarily on the ‘key industry tourism operators/organizations. A kick off meeting was completed with the MATA Board of Directors and the Project Steering Committee.

MATA Board of Directors

Kim Clarke - MATA Admin/RT07

Robert Trask, Chair, Chesley Lake Camp

Betty Ann (George) Knight, Vice-Chair, Airbnb Owner & Financial Advisor

Donna Harb, Secretary/Treasurer, Sauble Beach Chamber of Commerce, Realtor, Classic Sauble Cottages

Lisa Gow - Carson's Campground

Kim Follis - Financial advisor

Evan Baulch - Heydays Restaurant Owner

Mitch Grant - STA owner

Steering Committee

Robert Trask - MATA BOD Chair/Chesley Lake Camp

Joe Vanderzand - Wiarton Legion and Deep Water Gallery Director

Becky Knight - Sauble Beach Chamber of Commerce

Sarah Mann - Red Bay Tent & Trailer Park

Danielle Edwards – TSBP (a resource to the Steering Committee; arms-length Town representative)

Robyn Hewitt & Alex Hogan - RTO7

There were several observations that arose from the May 11, 2023, kick-off meeting (not in order of priority)

- obvious need to re-build trust among SBP, RTO7, MATA, and industry operators/organizations as well as MAT stakeholders, requiring transparency and ongoing communication.
- Re-branding opportunity for SBP (Gateway to the Bruce...); promotion of the natural beauty and natural assets in the area
- Need to capture “flow through” traffic heading to attractions in Northern Bruce Peninsula (Tobermory, Grotto)
- Focus marketing to over 40km one-way distance travelled.
- Focus on positive – need to minimize current talking points (Beach Claim, parking fees, negative response to MAT)
- Communication Strategy needed (requiring coordinated and consistent messaging), improved use of digital media.
- Potential to extend the season (slightly – May and June, September, and October) or year-round (not fully supported by all)
- Staffing a major issue (attracting, retaining, housing); consider partnerships with Colleges, incentives to provide housing.
- Event support for Volunteer activities
- Balance for all geographic areas of SBP (not just Sauble)
- Consideration to re-distribute funds proportionately based on where collected (sense of fairness, support for all)
- Potential to coordinate administrative support (computer, website, social media, volunteer management)
- Promote area for corporate getaways, retreats, destination weddings.
- Improved communication among all stakeholders; if an event is being held, need to have supporting services open/available to service it (accommodation, food & beverage etc.)

Interviews

Following the kick off meeting MGA conducted one on one interviews with key industry “influencers” between May and June. The purpose of these interviews with RTO7 Staff, the MATA Board of Directors, and Tourism Operators was to engage in conversations about tourism

in South Bruce Peninsula and reflect on the opportunities and challenges presented from a variety of perspectives. There was an opportunity to share their vision and overall ideas about tourism. Over 30 conversations were conducted over a two-month time frame. Unfortunately, MGA has been unable to speak to any First Nation leaders despite several different attempts. The following individuals provided insight during the initial engagement sessions:

- Jeff Loney, Bruce County Economic Development Director
- Matt Dwyer, Red Bay Lodge
- Tammy Pletch, Roth Campground
- Kim Clarke, RTO7/MATA administrator
- Mayor Garry Michi
- Sarah, The June Hotel, Sauble Beach
- Ryan Gardhouse, Sauble Beach Restaurant Owner and owner of 6 properties
- Danielle Edwards, South Bruce Peninsula, Economic Development Office
- Katie Laliberte, HeyDays Restaurant

Many concepts, ideas and discussions were shared that will help to shape the framework for the Tourism Strategy – Refer to APPENDIX C for a summary of feedback.

Focus Group Sessions

Concurrently with the one-on-one interviews we had two virtual engagement sessions that 10 individuals attended. We asked several key questions throughout the 90-minute interactive on-line engagement session (which included live polling on two questions). The following is a summary of the individual comments (and are not necessarily in order of importance).

What areas of South Bruce Peninsula do your visitors come to and why?

- Camping, nature opportunities
- Trillium hunt, rare orchids
- On “bucket list for many”
- Photographers
- Day trips with hikes, beach, visit to markets.
- Some stay in SBP and some travel north to Tobermory
- Campground has mostly seasonal with some overnight stays; visit Spirit Rock, Caves, Skinners Bluff (lots of repeat business)
- Sauble Beach and Bruce Peninsula as a whole
- lavender farm
- Red Bay beach
- Beaches
- Provincial Parks and falls
- Downtown Wiarton and Bluewater Park
- Spirit Rock Conservation Area
- Cape Croker Park – Bruce trail, indigenous experiences
- Chesley lake, fishing at inland lakes by Oliphant summer – split SB and rest of municipality
- Most well-known beside Wiarton Willie, mature, very seasonal July 01 to Labour Day
- SBP is dense with campgrounds as well as 2 all-inclusive resorts.
- Red Bay lodge, Bluewater Park, Spry Lake
- These are the Core Trip Motivators
- Hiking Bruce trail, eco adventure, race in Wiarton
- County – was pushing mountain biking - Purple Valley Park cycling popular.
- Some road cycling
- Great Lakes Waterfront Trail on both east and west sides
- Cycling lanes on #6 north of Mar
- South of Dyers Bay Road
- Why leave campground – challenging to leave campsites – camping is the activity.

- Lots provide activity for kids – pools, ponds, lakes.
- Two types = seasonal campers and transient campers – cottage owners seasonal – would move around more looking for things to do – beach, ice cream, music.

What do you (or your visitors) think are the gaps in tourism in South Bruce Peninsula?

- inability to draw visitors to come (KW, Guelph, and Toronto) to visit, and then decide to move and start a business.
- Large geographic area to reach – SBP, including Wiarton, SB
- Retail, tourism operators would like to see year-round business.
- promotions
- Lack of available real estate.
- Consistency and availability. (Some people think you can just arrive and book)
- Expectations of visitors (Uber, bank machines in campgrounds)
- Shoulder season very hit and miss – after Labour Day, very weather dependent.
- Lack of Workforce
- Housing of different types
- No restaurants or accommodations in the winter
- not enough washrooms
- lack of volunteer's
- Year-round restaurants
- No breakfast location
- Not one consistent area to find out what is happening – SBP, different websites.
- Seasonality DMO or RTO – must be a will from business owners; need key leaders in the community.
- Build out slowly, weekend, additional weeks on either side of key season.
- Need to build consumer demand.
- Need to build around WW festival, maybe add Christmas or concert weekend = need a draw otherwise people not coming in the winter as it is not sustainable (unpredictable weather).
- specific demand generators in peak (ie SB), but need to develop a demand generator that is NOT weather dependent – across province changing weather not dependable; natural assets and existing features mixed with something not weather dependent (i.e., Blue Mountain just a ski hill before village developed)
- Need a vision to be created and then start to work on it.
- off- season educational tourism partner with Parks Canada – schools and post-secondary to come on mass – experience and learn about nature and drive people here, come to learn.

What are the most important special events held in South Bruce Peninsula, and is there capacity for more?

- Wiarton Willie over 60 years old (media hype is big, but festival itself is small)
- Frustration with WW; restaurants and hotels closed driving people to Owen Sound
- Also, Wiarton Maple Fest and Rotary Fair
- Sand Fest in SB
- Local area events – chamber, service clubs
- Car shows, farmers markets (smaller events)
- Multi-sport race (run, cycle, paddle varying distances)
- Sand fest in SB
- Tuesday car show with live music etc.
- Capacity for more but more promotion is needed.
- Was support to help with grant writing but position vacated – impact capacity.

Ideas to showcase SBP tourism assets (poll question)

The top answers were:

Recreation/trails/adventure

Water

Beach

Shopping
Culinary
Bluewater
Cycling
Winter
Other – experiential business/farm offerings

Comments

- Key is to get them here.
- After the first few days’ stay people need something to do.
- No stopping people driving up #6 on Friday night, maybe catch them mid-week or on the way home.
- unparallel nature and wildlife, Immersion with nature (bears, bald eagle, osprey nest, snakes, turtles)
- Promoting SBP as your home base with whole Peninsula to explore

What could MATA/SBP do?

- Financial support was offered previously to merchants.
- Simplify support structure as RT07 support is an onerous process as they needed to collect postal codes, plus take customer service training.
- Radio campaign has helped them.
- need some shared marketing materials for cyclists (Ride the Bruce) at locations in GTA bike shops and outfitters.
- Take a vendor booth – Cottage Life, Sportsman Show, Bike Shows etc.
- train in culinary, service, hotel industry in off season and then use skills in industry but need to partner for satellite campus idea.
- strategy for labour shortage workforce development a core pillar, attraction, and retention – recruitment “jobs in Bruce” platform
- Coordinate linkages between job seekers and local business
- Keeping youth in the area.
- Need help including operating into off season, staffing into offseason.
- Contract a summer content creator.
- Operating expense help (incentives to stay open)
- Writing grants
- Product and experience development opportunity so when visitors come, they generate more revenue.
- Share awareness and resources of business grants
- Need to ensure all stakeholders come to the table and help with identifying problems and creating solutions; otherwise, MAT will have ended up costing everyone more.
- Coordinated development of a website.
- Support coordinated communications hub.
- Event capacity limited so MAT could support or share for festivals.
- Accommodators cannot survive without food and beverage, coordinated services and activities.
- Work with SBP – they get 50% of funds and have more flexibility on how to spend it; need to help with tourism assets broadly in the community.
- All partners must work together – “tourism is a team sport”.

What are the priorities (A poll question):

The top responses were-

- Staff development and recruitment
- Off season
- Product and experience development
- Tourism infrastructure
- Marketing
- Transportation

Comments

- Challenge with young staff – get trained, SMART serve and then leave.

- Need to promote the industry as a career and educate that customer service skills, food handling skills etc. can be useful in other career pursuits.
- Potential to work with post-secondary to encourage culinary, internship ideas, onsite training.
- Opportunity for paid activity – tours, fishing guides, kayak, canoe rentals.

How could MATA help?

- Potential ideas to help all (not just SB and Wiarton, but rural too)
- Need to increase awareness – “don’t know, won’t go”, present area as a destination.
- Need enhanced social media and targeted campaigns to various demographics.
- multi-media campaigns on what SBP assets have to offer, story-based commercials (Paid advertising, radio, social media)
- Consider targeted audiences provided it encourages people to stay (not just a day trip)
- capture individual email addresses through a sign-up option and target to database directly.
- Ways to reach watercraft visitors – Wiarton Marina, Oliphant Marina, Sauble Beach River.
- Need to be clear that the number of visitors must equal the capacity to provide required services.
- Need contract staff to execute vision on the ground.
- How to recruit 40 people to come and work in SBP in the summer, creative ways to host an industry night and recruit needed staff (bartenders and line cooks).
- Housing and options to address barriers to support all types of housing (impact of building code requirements, permits for allowing trailers etc.) consider staff camp with lodge and tents, yurts.
- Local Government owns property – could work together to create accommodation options.
- Need to get all jurisdictions together to address the real issues. Identify key gaps, where can they develop new products – funding support for staff, work with RTO and partners.
- Support cooperative marketing program with MATA receiving a small %.
- Other examples where coordinated solutions benefit all – STAG in Northern Bruce (sustainable tourism action group)
- Coordination and clarity – many players are marketing but not very coordinated.

Preliminary Strategic Themes

As outlined in the introduction of this section, the engagement process was designed to uncover common themes impacting tourism operators. In so doing, the analysis recognized all challenges and opinions offered by individual tourism operators, however in meaningful strategy development it is critical to synthesize inputs into the common themes impacting the entirety of the sector. As such, our analysis has uncovered the following five strategic themes:

- Staff recruitment and housing
- Extending the tourism season outside the summer season
 - initially by one month on either side
 - building on special events and/or feature dates
- Tourism infrastructure (washrooms, parking)
- Elevating the visitor experience
- Improved coordination and communication to maximize resources.

SURVEY SUMMARY

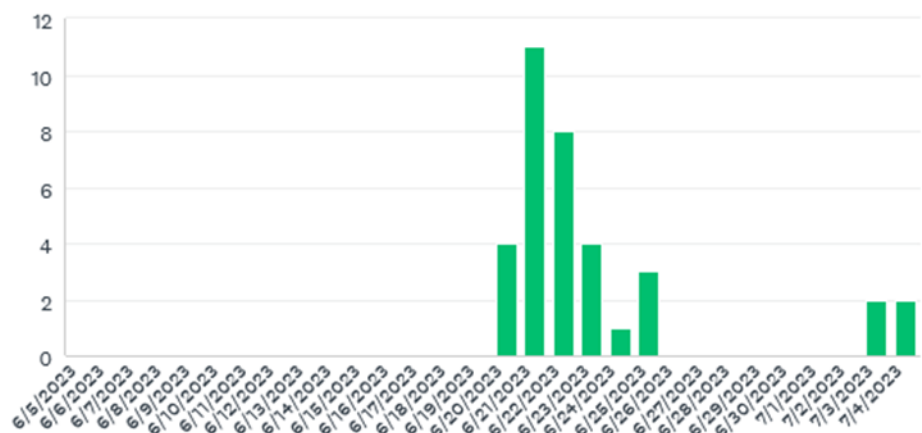
Building on the results of the engagement findings, five themes were identified in the engagement analysis.

- **Staff recruitment and housing**
- **Extending the tourism season outside the summer season**
 - initially by one month on either side
 - building on special events and/ or feature dates
- **Tourism infrastructure (washrooms, parking)**
- **Elevating the visitor experience**
- **Improved coordination and communication to maximize resources.**

These themes were included in the on-line industry survey in the following format:

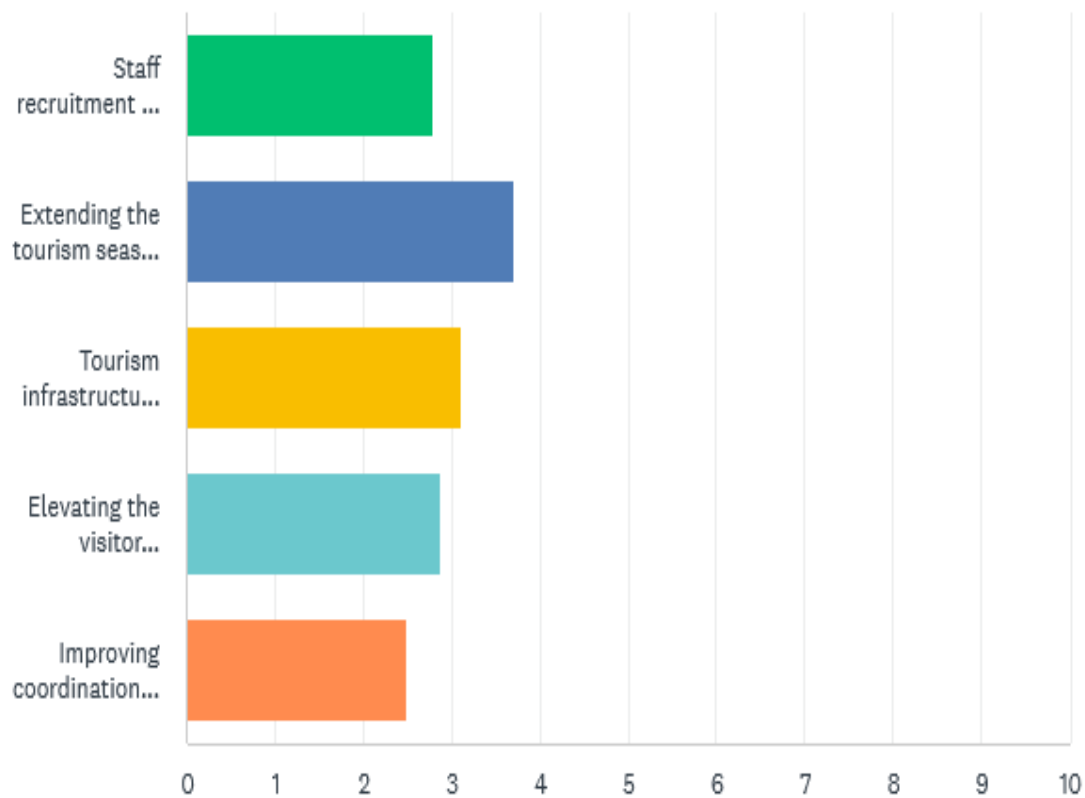
“Based on the initial industry stakeholder engagement feedback received, five main areas of focus (or pillars) have been identified to support growing a sustainable tourism sector in South Bruce Peninsula. Please rank these pillars according to their importance (with 1 being most important and 5 being least important).”

The on-line industry survey was conducted between June 20th through July 5th. The survey received 35 responses with a 100% completion rate. The average survey took the respondent approximately 15 minutes to complete the 11 questions. The goals of the survey were to confirm initial engagement conversations with a more diverse stakeholder group, test the strategic themes/pillars that were emerging from initial engagement and the background data, and receive additional ideas and strategies to help inform the Tourism Strategy. Most of the responses were received between June 20th to June 27th.



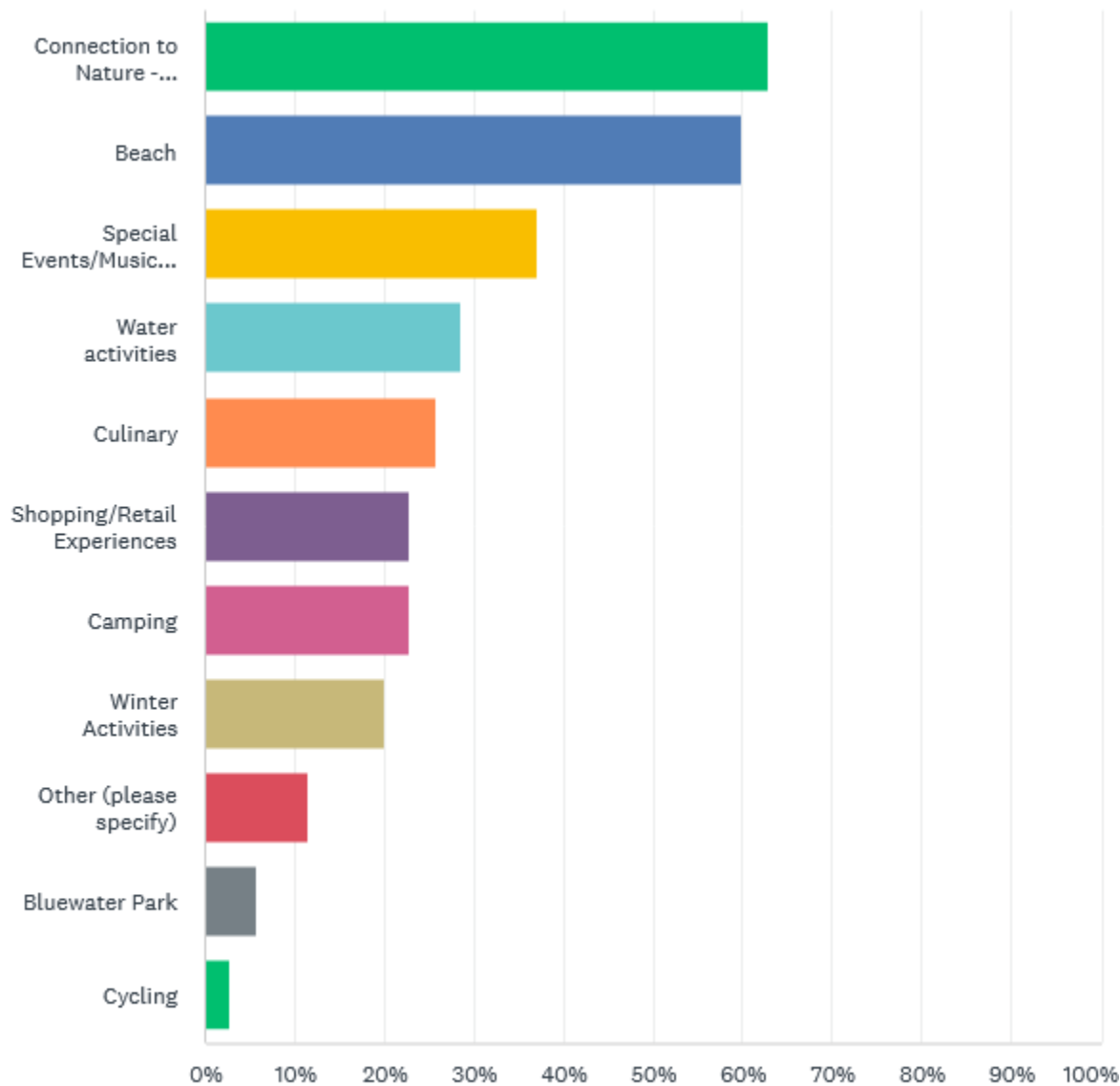
The summary of findings of the survey are as follows, for complete survey results see APPENDIX D.

QUESTION 1: Based on the initial industry stakeholder engagement feedback received, five main areas of focus (or pillars) have been identified to support growing a sustainable tourism sector in South Bruce Peninsula. Please rank these pillars according to their importance (with 1 being most important and 5 being least important).



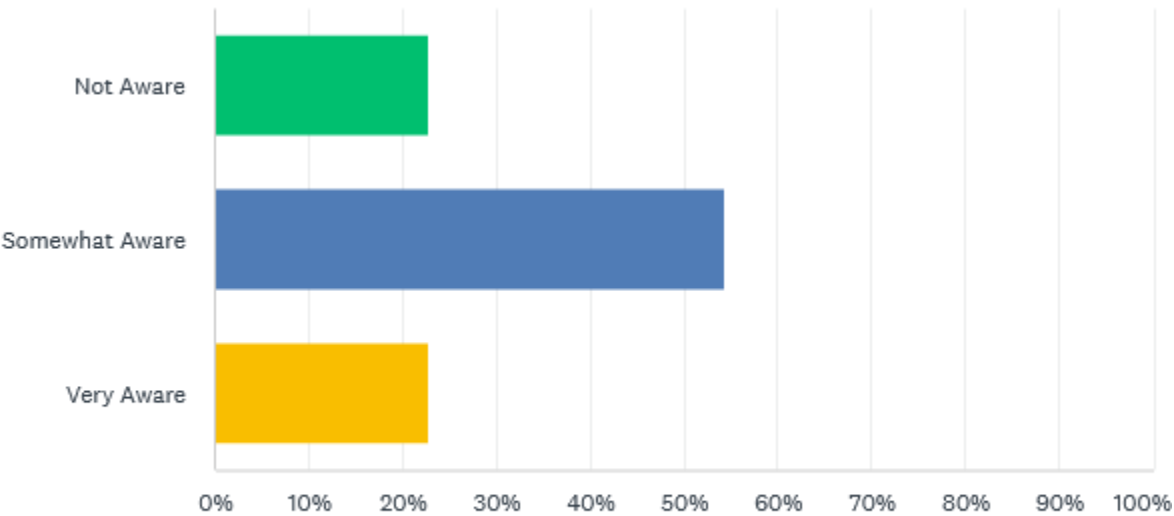
The top two pillar ranking were Extending the tourism season (3.71 ranking) and Tourism Infrastructure ranking second (3.12). All five ranking were very close from 3.71 ranking to 2.50 ranking.

QUESTION 3: South Bruce Peninsula offers a variety of visitor experiences. In your opinion, what do you think are the top three visitor experiences South Bruce Peninsula should focus on?



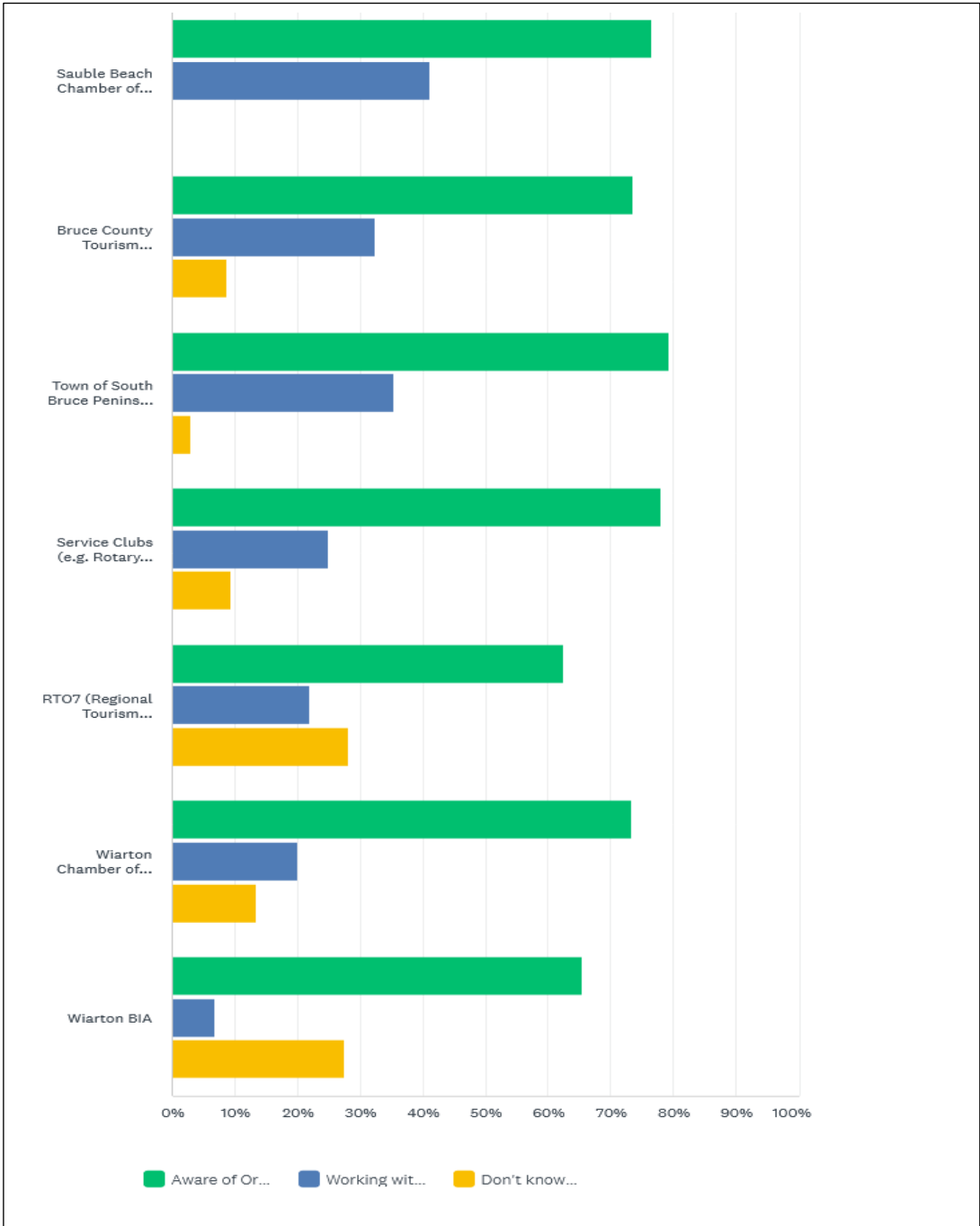
The top three visitor experiences South Bruce Peninsula should focus on were the Connection to Nature, Beach, Special Events/Music

QUESTION 4: How aware are you on what MATA can use the MAT revenues for?



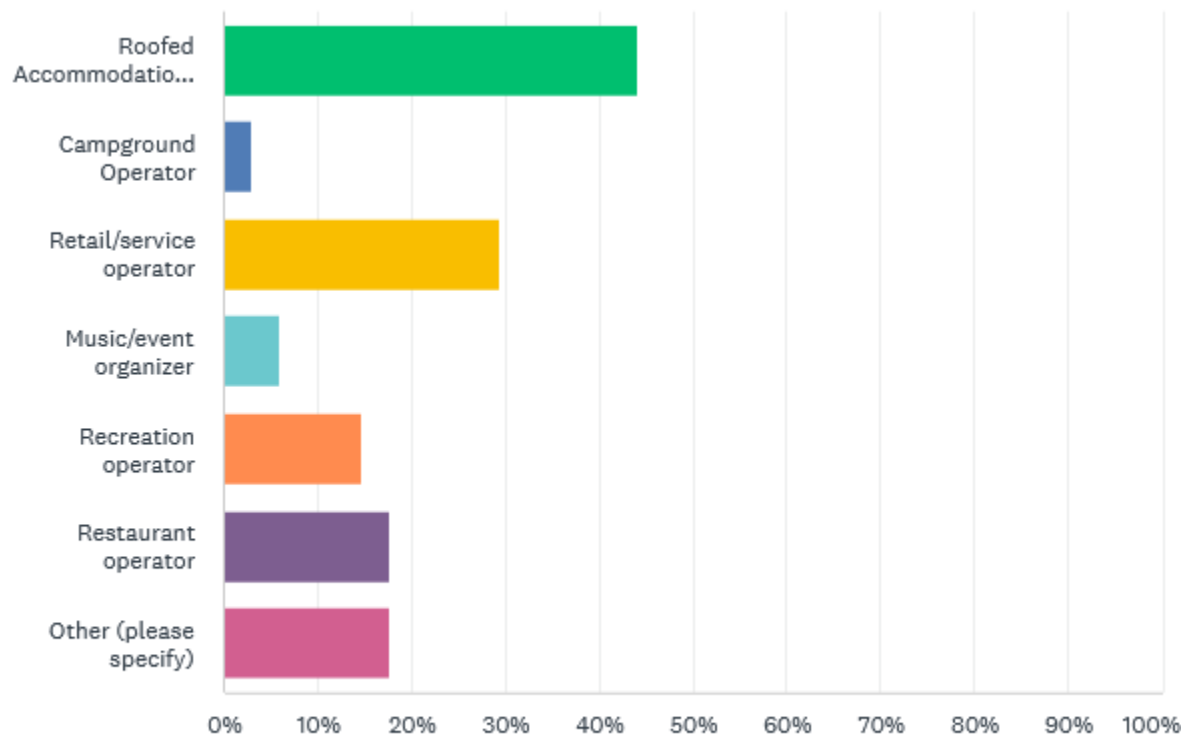
Over 50% of respondents were Somewhat Aware of MATA and what MATA can use the MAT revenues for there was an equal split between Not Aware and Very Aware.

QUESTION 6: From the following list of tourism industry supporting organizations, please indicate by checking the appropriate box which organizations you are aware of, and which you are working with.



The organizations stakeholders are most aware of and working with are Town of South Bruce Peninsula, Sauble Beach Chamber of Commerce, Service Clubs and Bruce County.

QUESTION 8: To help us further understand the survey responses received, how would you classify your role within the tourism industry in South Bruce Peninsula.



There were representative from all tourism sectors above, with the largest number of respondents from Roofed Accommodation Operator.

For complete survey results with the open-ended question please refer to APPENDIX D.

MAT MUNICIPAL COMPARATOR REVIEW

Introduction

The Municipal Accommodation Tax (MAT) is a revenue tool that allows municipalities to support, promote, and grow tourism as an economic driver.

With the MAT generating revenue to support and promote local tourism, establishing a clear and transparent process of MAT revenue distribution, project monitoring and evaluation is increasingly important. This applies to both eligible tourism organizations and municipal portions of MAT funding.

This report looks at three cases of implementing MAT in Eastern Ontario –the City of Kingston, Prince Edward County, and Quinte West and one case from Northern Ontario – City of Timmins.

The examples demonstrate progress that these municipalities have achieved in implementing the MAT.

Main takeaways include the importance of achieving greater transparency in MAT revenue distribution.

Each case offers helpful insights into how the MAT can be distributed:

- The City of Kingston has agreements with Kingston Accommodation Partners and Tourism Kingston – all three partners participate in committees making decisions about MAT funding distribution.
- PEC created a new Destination Marketing Organization (DMO) and transferred responsibilities and funding for tourism marketing and research to the organization. MAT revenue will fund this organization.
- Quinte West holds an Accommodation & Attraction Stakeholder meeting bi-annually to discuss opportunities/challenges and provide updates on tourism activities and initiatives.
- City of Timmins shares 50% of MAT revenue with the Timmins Economic Development Corporation (TEDC). TEDC has established the MAT Fund, which supports distribution of funding to local tourism organizations through an application process. The TEDC MAT Subcommittee of the TEDC Board, consisting of tourism industry representatives, City of Timmins, and local tourism and economic development organizations, evaluates funding applications and develops recommendations for the Board. All information about the Fund, the application process, evaluation criteria, and results of funding rounds are communicated through a dedicated MAT section on the TEDC website.

While municipalities have clear and detailed instructions about MAT collection; most of the reviewed cases do not provide guidance on or a description of MAT revenue distribution on their public facing websites – the first point of information for anyone from the tourism industry or the public. The websites often lack information regarding the criteria for MAT distribution, or a description of opportunities that MAT funding offers to the tourism industry.

Neither of the reviewed Destination Marketing Organizations provide sufficient level of detail (if any) or reports regarding how their portion of the MAT is allocated, how they spend the MAT funding, or what their plans are. This kind of information is important for transparency and better understanding of how MAT funds work to support the tourism sector and the economy.

As the City of Timmins example shows it is important to understand clear priorities (based on the Tourism Strategy and year-to-year trends), have processes and staff in place to support the management of the MAT Fund, and provide detailed information about funding opportunities, application evaluation criteria, and report on the results. etc.

Establishing a process and decision-making criteria for MAT funds distribution and publishing detailed guidance and information on public facing websites is important for encouraging applications and supporting the development of local tourism industries.

The following case studies discuss the practice of implementing MAT in the four municipalities, focusing on the process of allocation and distribution of revenues collected through MAT. The three Eastern Ontario cases include: City of Kingston, Prince Edward County and Quinte West. The fourth case – the City of Timmins – The Timmins Economic Development Corporation - is an example of a MAT distribution program designed to support the local tourism industry.

Kingston

About the MAT

In Kingston, the mandatory Municipal Accommodation Tax (MAT) replaced the voluntary 3% destination marketing fee (DMF) that had been administered by Kingston Accommodation Partners (KAP) since 2004 and until the introduction of MAT.

The 4% MAT [By-Law Number 2018-95](#) has been in effect since 2018.

The Municipal Accommodation Tax received by providers of transient accommodation is collected by the City of Kingston and Kingston Accommodation Partners as an agent for the municipality.

Exemptions to the MAT include colleges and universities, which are exempted based on provincial legislation. Having said that, both Queen's University and St. Lawrence College have voluntarily been collecting a fee which has been redirected to KAP. These institutions have decided to work in partnership because they recognize the importance of tourism as a sector and recognize the financial benefit that tourism brings to their own institutions.

The provincial regulations allow municipalities to enter into an agreement with a tourism entity to collect the tax on their behalf and prescribes a revenue sharing formula where proceeds are shared with a pre-existing eligible local tourism entity.

In 2018, Council approved a partnership and agreement between Kingston Accommodation Partners, Tourism Kingston (TK), an External Agency supported by the City, and the City for the collection and reinvestment of the MAT revenues. The agreement was renewed in 2020.

The agreement designates Kingston Accommodation Partners as the agency responsible for the collection of the MAT on behalf of the City as KAP already had a system in place through its previous collection of the voluntary 3% destination marketing fee.

About Kingston DMO

Kingston Accommodation Partners and Tourism Kingston promote Kingston as a destination for leisure visitors, meetings and conventions, major events, media relations, tour operators, sport, film and travel trade. Kingston Accommodation Partners' long-term destination development initiatives aim at enhancing the visitor experience.

Since 2004, Kingston Accommodation Partners implemented and administered the voluntary 3% destination marketing fee.

What happens with MAT funds?

Funds generated through the Municipal Accommodation Tax are invested in destination marketing, sales, and product development in Kingston.

As part of Council's approved partnership agreement, the funds collected are to be redistributed between marketing/promotion (65%) and a Development Fund (35%).

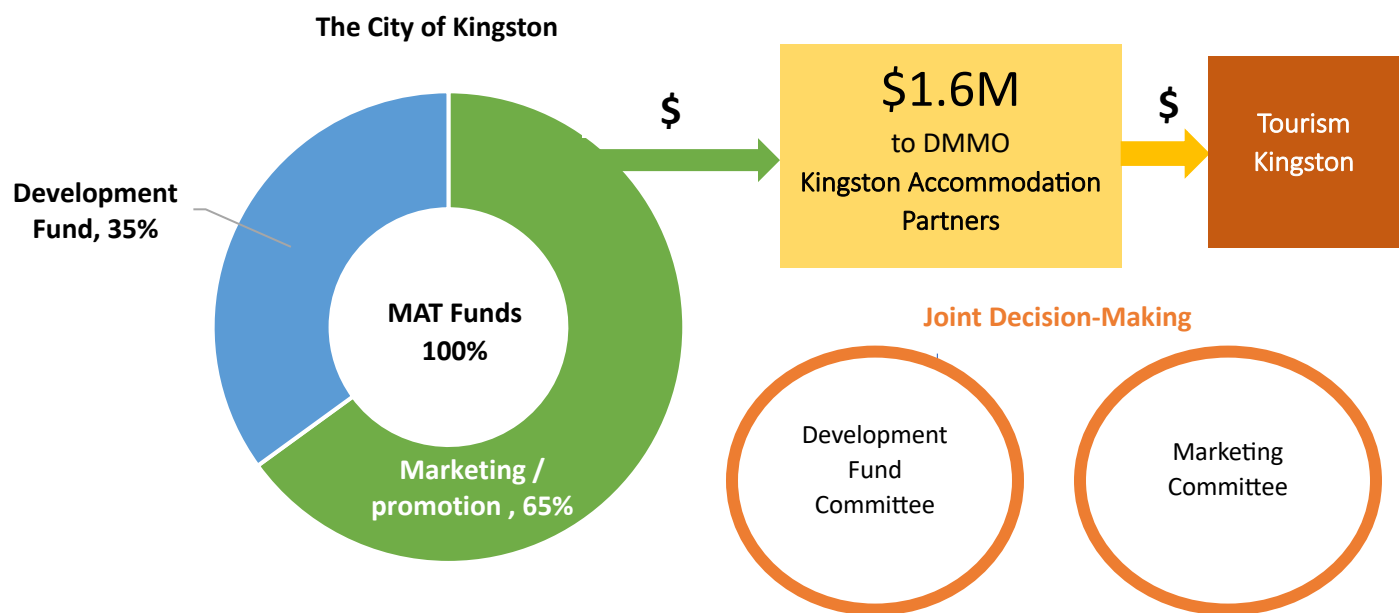
The Ontario Regulation 435/17 requires allocation to a pre-existing Destination Marketing Organization an amount representing the average annual amount of previously collected destination marketing fee. In 2022, from the 65% allocation, the City is obligated to provide \$1.6M of the MAT revenues escalated annually to KAP.

If the 65% redirected to marketing and promotion is less than the \$1.6M, KAP is to receive its funding and the contribution to the Development Fund would be reduced.

The agreement between the City, Kingston Accommodation Partners and Tourism Kingston also outlines that funds will be provided in addition to the 65% to account for incremental costs related to the MAT collection processes, recognizing that there are a much larger number of properties that are now mandated to contribute to the MAT.

The marketing/promotion funds are primarily redirected from Kingston Accommodation Partners and Tourism Kingston based on a Service Level Agreement signed by both TK and KAP. The following Exhibit illustrates the process.

Exhibit 1. Kingston: MAT Funds Distribution & Decision-Making Process



Marketing Committee

These annual funds are to be spent on marketing initiatives contained in an integrated marketing plan developed by TK in consultation with a **Marketing Committee**. The Marketing Committee includes representatives from the City, Tourism Kingston, and Kingston Accommodation Partners.

Development Fund Committee

The Development Fund is used to fund product development, major events attraction and strategic initiatives to advance the implementation of the Integrated Destination Strategy (2019).

Decisions related to the Development Fund are authorized through the Development Fund Committee which includes representation from TK, KAP and the City.

In 2018/2019, the Development Fund Committee supported the following initiatives:

- Invested \$260,736 in the 2020 Brier Curling Championship.
- Allocated up to \$200,000 per year to support the attraction of new airline carriers and additional flights at the airport.

[City of Kingston - City Council Agenda - Meeting 03-2021 - Report COU-21-040](#)

- In 2020, MAT revenues were allocated to the development fund to support the tourism industry impacted by the pandemic. Council approved up to \$700,000 to be transferred from the MAT Development Fund to offset MAT revenue shortfalls in 2020 and to ensure ongoing funding of marketing and promotional activities.

What plans or policies guide MAT funding decisions?

Kingston Integrated Destination Strategy - “Co-creating an integrated destination strategy for Kingston – moving beyond recovery to destination resiliency, 2022–2027” (2023) recognizes that

the MAT has generated significant funding to support tourism initiatives across the city without impacting potential visitor spend with accommodation partners. The Strategy recommends extending a voluntary levy to other types of accommodation.

The destination strategy guides MAT revenue distribution. The overall vision and mission are as follows:

*To develop, optimize, and **enhance Kingston’s visitor economy** assets and infrastructure across **all seasons** to attract visitors for leisure, meetings, sports, group travel, and creative industries – to **grow year-round tourism revenue** while leveraging tourism’s potential to positively influence resident quality of life, key partner groups, and the environment.* Source: [Community - Kingston Accommodation Partners](#)

Tourism initiatives supported by Kingston Accommodation Partners



Kingston Accommodation Partners contributes to place building and community partnerships supporting community initiatives, development of recreation and tourism facilities, attracting conferences and sport competition, and sponsoring events.

Initiatives partially supported with MAT funds include:

- Kingston’s Integrated Destination Strategy.
- Kingston’s Culinary Strategy.
- The Leon’s Centre build – a venue for sporting events, concerts, special events, and community activities.
- Expansion of the Visitor Information Centre.
- Kingston’s airport expansion.
- Prestige sports events, including curling events such as the Scotties 2013 and Brier 2020
- Supporting the Kingston Film Office to attract and support media production.
- Supporting Tourism Kingston’s sales and marketing efforts, and

- Supporting the Conference Incentive Program that provides financial support to event planners. The program supports events that attract visitors to Kingston.

Concluding Observations:

Kingston is a helpful example of how MAT decision-making can be organized.

- The process of MAT distribution is in place as guided by the joint agreement.
- The three MAT-implementing partner organizations - the City of Kingston, Tourism Kingston and KAP - work together.
- All three partners are represented in the joint decision-making committees.

However, the organizations’ websites do not provide guidance, reports, or more detailed information about how MAT funds are distributed. It is not clear if and how tourism development initiatives can apply for funding.

Prince Edward County, PEC

About PEC Municipal Accommodation Tax

- Tax Rate: 4% in effect since February 1, 2021 (PEC Municipal Accommodation Tax BY-LAW NO. 53-2020)
- Revenues: \$1.21 million in 2021, \$1.42 million in 2022
- In 2023, staff recommended an increase to 6%
- 2 eligible tourism organizations receive the 50% portion of the MAT revenue.

PEC [Municipal Accommodation Tax BY-LAW NO. 53-2020](#) definitions and provisions with regard to MAT revenue distribution:

The MAT tax applies to “the accommodation portion of short-term, roofed accommodation in Prince Edward County”. This means all STA dwelling rentals, including inns, hotels, motels, B&Bs, and any other accommodators offering roofed accommodation.

In addition to the types of accommodation detailed in the provincial legislation, PEC excludes from the MAT tents and RVs.

Relevant to MAT, PEC has a Short-Term Accommodation (STA) system and the short-term accommodation ([by-law No. 4518-2013](#)) system allows estimating and monitoring supply of short-term accommodations and enforcing administrative penalties. This system is important for the MAT implementation.

How much revenue does MAT generate?

In the reviewed cases, municipalities by Council decision allocate their 50% to the Tourism strategies (where available) and to infrastructure projects.

	2021	2022
MAT Revenues	\$1.21 million	\$1,472,303
MAT Admin. Costs	\$80,000	\$109,803
50% Municipal	\$565,000	\$653,892
50% - 2 Eligible Tourism Organizations	\$565,000	\$653,892
- Stay PEC	<i>No agreement in 2021</i>	\$104,460 (one time payment)
- Visit the County	<i>Established in 2022</i>	\$548,912

What documents or policies guide funding decision-making?

Tourism management is a part of the County's core summer operations. The Community Services, Programs and Initiatives, and several other departments are involved in the delivery of tourism management.

In 2021, PEC developed and implemented its first **Tourism Management Plan** as part of a post-pandemic tourism industry recovery effort.

- **Prince Edward County Destination Development Strategy, October 2021** *aims to balance the needs of the tourism industry and the needs of the resident by, helping to mitigate the impact of tourism on residents and infrastructure.*
- **Tourism Business Retention and Expansion (BR+E) - study of the tourism and hospitality sector** *with 85+ interviews to get a thorough understanding of the sector's status, growth potential, development opportunities, needs, challenges and more.*
- **Tourism Master Plan** *- a policy document funded through the Regional Tourism Organization 9 (RTO9) and Canadian Experiences Fund (CEF) to create a 5–7-year plan for destination development of Prince Edward County.*

These documents are based on public and industry consultations and are aligned with the County’s strategic priorities and economic development plans related to the tourism sector.

The MAT by-law is aligned with the following corporate strategic priorities:

Livable Community

- Foster an affordable, healthy, livable community for all;
- Creation of a municipal corporation as the DMO would allow for a transparent, community influenced process towards the allocation of MAT funds to create a sustainable destination where tourism can benefit all residents.

Stable and Diversified Economy

- Balance the needs of the tourism industry and the needs of the residents, mitigating the impact of tourism on residents and infrastructure.

Financial Sustainability

- Ensuring financial sustainability with a financial plan that allows us to achieve our financial objectives.

What happens to MAT Funds?

Municipal Portion of MAT Revenue (50%)

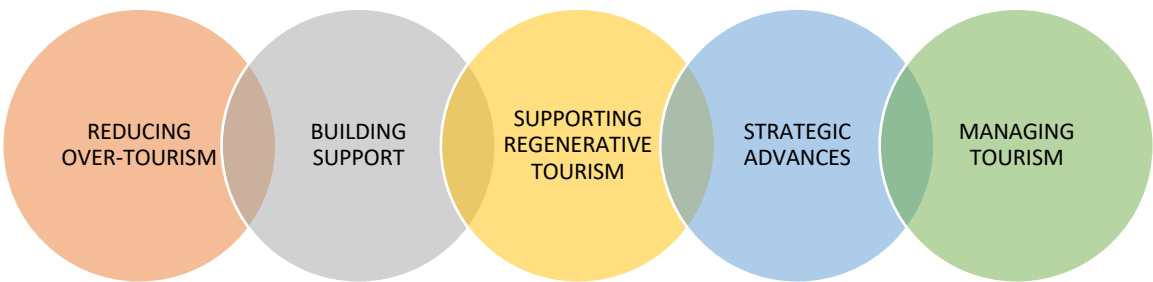
The PEC MAT by-law and Tourism Strategy guide the municipal uses of the MAT for tourism marketing and services that support tourism and infrastructure (e.g., affordable housing, road repairs, etc.). PEC Council decides how these funds are to be spent at its annual budget meetings.

The municipality invests in projects that support tourism but also provide benefits to residents, such as parks, boat launches, trails, and tourism management efforts. In its decisions, the municipality is guided by the Tourism Strategy, Tourism Master Plan and its strategic priorities that relate to the promotion of tourism.

Tourism has value and benefits for the community and at the same time increases costs of managing public infrastructure, parks, conservation areas and water access areas, public parking, etc. Therefore, municipal tourism-related projects in PEC include infrastructure (e.g., roads, water and sewers), by-law enforcement (e.g., parking), shoreline protection, and other municipal services that have increased need during the tourism season. MAT provides a source of revenue to cover these tourism related costs with the funds provided by visitors rather than residents.

Prior to the introduction of the MAT the County undertook consultations to make recommendations to Council about MAT spending and developed a tourism development strategy (2021). As shown below, the strategy has five (5) pillars and includes MAT related recommendations.

Pillars of the Prince Edward County Tourism Development Strategy (2021)



MAT recommendations in the the Prince Edward County Tourism Development Strategy (2021)

- MAT revenues need to demonstrably take the pressure off residents in paying for additional costs related to tourism.
-
- Incorporate a measure of community benefit or involvement when assessing projects receiving Municipal Accommodation Tax funding.
- A portion of MAT revenues should be used for projects or events that support a sense of community.
- A sponsorship program be developed, prioritizing winter season events with community appeal and cross-sector benefits. As these festivals and events can face organizational, volunteer and funding-based challenges, sponsorship would help alleviating some of these roadblocks.

DMMO 50%

The MAT regulations require that 50% of collected MAT funds must be transferred to an eligible tourism entity, or Destination Marketing Organization (DMO), independent from the municipality. The PEC MAT By-law directs the DMO to use their portion of the MAT funds for “the exclusive purpose of promoting tourism” (para 19). The By-Law does not include further provisions regarding distribution of MAT revenues.

Since 2013, the Municipality was acting as the DMO for The County, managing the 'Visit The County' brand and providing visitor services. As per provincial and local regulations, with the introduction of MAT the tourism sector must have a say in how the marketing funds are spent.

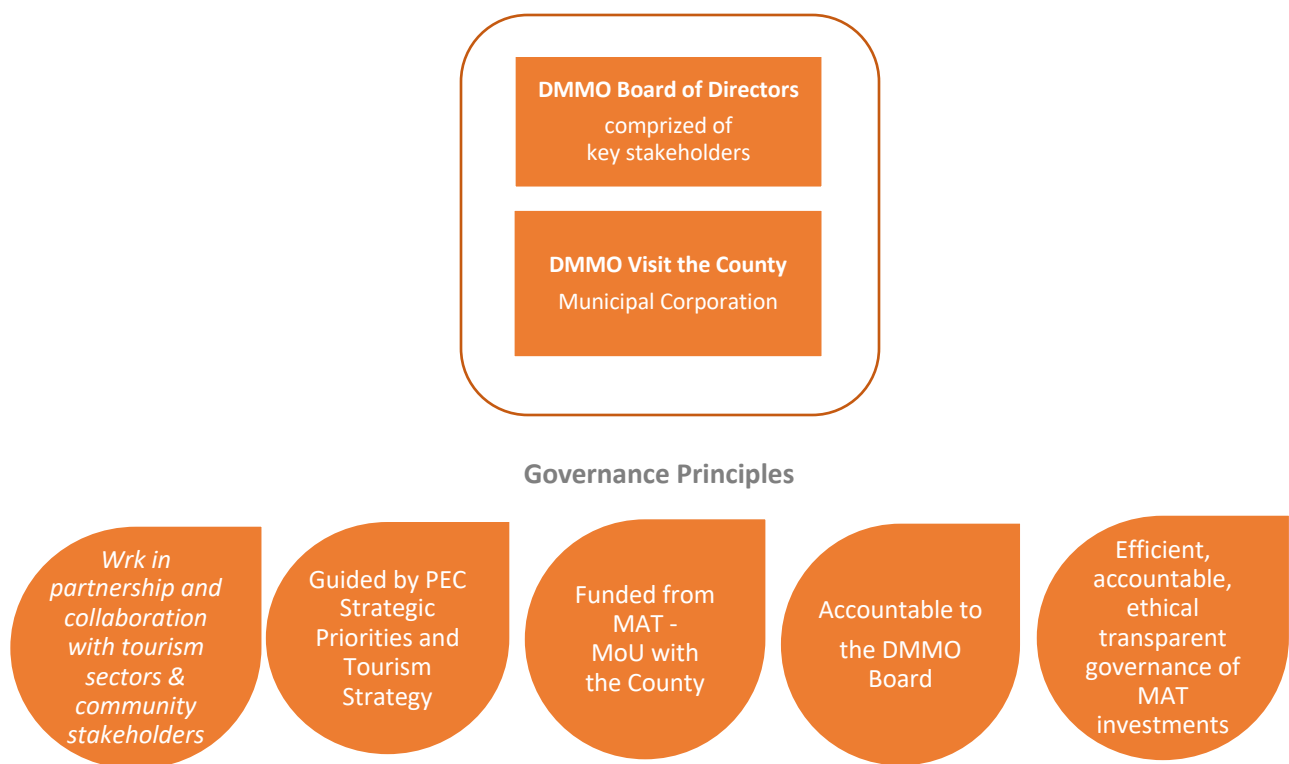
In 2022, the Municipality of Prince Edward County established a Destination Marketing and Management Organization (DMMO) – VisitPEC. A municipal corporation is owned by municipality but acts as an autonomous organization governed by the industry board that delivers local public services economic development or tourism agencies) ([Infrastructure Canada - Canada Healthy Communities Initiative Applicant Guide](#)). As such the DMMO can explore creative solutions to how tourism can both grow and thrive as an economic and cultural driver for PEC. VisitPEC will be responsible for implementing the PEC Destination Marketing Strategy and Tourism Plan.

The DMMO is funded by a portion of the MAT revenue. In 2022, \$50,000 from the municipal portion of the MAT funds were allocated to support the creation of the new DMMO. Once the DMMO becomes fully operational, destination marketing and visitor services will be funded through the DMMO budget and no longer through the municipal budget.

,

The exhibit below identifies the governance structure of the DMMO and working relationship with the municipality.

Tourism Sector Governance Structure: Destination Management and Marketing Organization as a Municipal Corporation



Source: PRINCE EDWARD COUNTY: THE CASE FOR A Destination Marketing and Management Organization

Visit The County mandates are to:

- *Work closely with the municipality and regional partners to strategically advance responsible tourism management, environmental sustainability, and regenerative tourism goals.*
- *Work in partnership and collaboration with various tourism sectors and community stakeholders to promote Prince Edward County and ensure quality destination experiences for all.*
- *Provide efficient, accountable, ethical, and transparent governance of Municipal Accommodation Tax investments related to tourism and use their allocated portion to*

fund marketing, minor tourism related capital projects and tourism product development.

- *Represent and support the Prince Edward County tourism sector and act as a leader in tourism marketing through management of visitor facing digital accounts, print materials and other promotional assets related to visitor services.*
- *Collect and clearly communicate key tourism statistics, economic and social impact data, and credible information related to market research and travel trends.*
- *Provide a vehicle for the transfer of municipal and other partner assets, physical or financial, for destination marketing and management related to tourism.*

PEC has two eligible tourism entities, why?

Ontario regulations allow municipalities to share MAT revenues with more than one eligible tourism entity. In addition to the recently established DMMO Visit PEC, the County recognizes The Prince Edward County Accommodation Association StayPEC as an “eligible tourism entity” for MAT.

StayPEC is a not-for-profit tourism marketing organization with a mandate to market PEC as a tourism destination. StayPEC focuses on marketing initiatives to promote shoulder and off-season tourism. The organization offers free marketing programs to its members. MAT funding supports the association and its marketing initiatives.

Prior to the introduction of the MAT in 2021, The Prince Edward County Accommodation Association Stay PEC members had collected a voluntary 2% destination marketing fee (DMF) from overnight visitors. This voluntary destination fee program generated \$100,000 annually that was used to promote winter tourism and the shoulder season. As provided in the provincial regulations, this previous beneficiary status makes StayPEC legally entitled to a portion of MAT funding from the DMO portion. StayPEC is eligible for the total amount of revenue collected under the voluntary destination fee program in the fiscal year 2020 (calculated as determined in Section 2.8. Ontario Regulation 435/17).

In the process of DMMO creation, StayPEC as an industry-led advocacy group advocated for a more comprehensive process of consulting with the business community with regard to an industry-led versus a municipal-led DMMO.

In 2022, The County and StayPEC signed a Memorandum of Understanding (MOU) that allocates the amount to be paid and outlines how MAT funds should be spent. The MOU offered StayPEC a one-time payment of \$100,000 to reflect their role as the previous accommodation charge collectors. “In exchange, Stay PEC would forfeit any claims/expectations to further MAT funding or to act as the DMO.” (Staff Report Regular Council – 14 Dec 2021). In 2022, The County allocated StayPEC \$104,460 (or 16% of the total DMO share) of MAT funding to fund its tourism marketing activities. Stay PEC provided The County with a business plan for consultation and input that outlines how these funds support Article 1.2 Promoting Tourism in The County.

Stay PEC expressed their intentions to work in partnership with Visit the County in the future.

What has been supported through MAT so far?

In 2022, to implement the PEC Tourism Strategy a **Tourism Management Budget** was created for 2022 and beyond.

This Budget consolidates expenditures from all municipal departments involved in tourism management and is funded through user-generated fees and MAT funds.

The total 2021 Tourism Management Plan cost of \$201,118 was covered by user-generated fees (\$79,784) and the municipal share of MAT funds (\$121,134).

Exhibit 2. PEC: Allocation of the Municipal portion of MAT Revenue in 2022-2023

	2021	2022
MAT Revenues	\$1.21 million	\$1,372,303
MAT Admin. Costs	\$80,000	\$109,803
MAT for Tourism	\$565,000	\$653,892
50% Municipal \$565,000	<p>\$115,000 The County used for various expenditures including legal and professional fees (\$50,000).</p> <p>Council minutes do not provide details regarding these expenditures. Including:</p> <ul style="list-style-type: none">• up to \$50,000 from the municipal portion of the 2021 MAT collection to support the creation of the new DMMO <p>The remaining \$450,000 were put in the Reserve for MAT. As directed by Council, the remaining amount was distributed as follows:</p> <ul style="list-style-type: none">• \$220,000 (40%) transferred to fund for Road Construction in the 2023 budget• \$125,000 (22% of the municipal portion of the 2022 MAT revenue) from the MAT Reserve allocated to fund needs of the 2022 Tourism Management Budget, includes:• \$76,000 to implement the tourism management plan for Wellington beach, Wellington boat launch and bulk water station (incl. traffic management, boat launch improvement, relocation of the water station)• Municipal Park Signage Plan funded through proceeds from the 2021 Tourism Management Plan and the MAT.	<p>In 2022, The \$1,372,303 earned \$45,284 in interest.</p> <p>The end of year 2022 balance in the Reserve for MAT (municipal use) was \$818,500. As directed by Council, this amount was distributed as follows:</p> <ul style="list-style-type: none">• \$700,000 (88%) transferred to the Reserve for Roads Construction.• \$118,500 (12%) allocated to fund needs of the 2023 Tourism Management Plan / Tourism Management Budget• A Municipal Boat Launch Strategy includes enhancements to the existing amenities.

Concluding Remarks

The County is in the early stages of the MAT implementation.

The DMMO Visit PEC was established as a municipal corporation governed by the Board. The organization is still being established and tourism marketing responsibilities are being transferred.

In 2022, The County allocated its portion of the MAT funding to the Implementation of the Tourism Strategy through the Tourism strategy budget and to infrastructure – road construction.

PEC MAT decision making is supported through policies and plans. Often cited criteria for MAT funding allocation are the implementation of the County’s Destination Strategy and tourism marketing and promotion.

Staff reports and Council Decisions are published on the County website and provide information about the amount of tax collected and distributed.

Currently the DMMO website does not communicate to the tourism industries and community representatives how MAT funding is going to be distributed. It is not known yet how Visit PEC plans to allocate its portion of MAT funding. If they plan to support events and organizations, the process is not presented explicitly on their public facing webpage.

Quinte West

About MAT

A 4% transient Municipal Accommodation Tax (MAT) through a by-law for the City of Quinte West was to begin July 1, 2019.

The City’s Corporate and Financial Services Department processes the collection of MAT directly from the providers of short-term accommodation and processes the distribution of funds.

Quinte West Finance staff is tasked both with the collection of funds from the accommodators and the distribution of funds.

A Tourism Reserve Fund was established for receiving and distributing the City of Quinte West’s share of revenue from the Municipal Accommodation Tax.

Tourism Entity: the Regional Destination Marketing Organization (DMO), the Bay of Quinte Regional Marketing Board (BOQRMB). [Bay of Quinte Tourism](#) – does not provide information on MAT distribution process on their website.

The MAT is collected directly from all Quinte West hotels/motels/B&B’s and through Airbnb for other transient accommodations.

Before adopting the tax, The Economic Development & Tourism Advisory Committee directed staff to initiate a consultation to engage Quinte West accommodators and other tourism business leaders to develop a plan for the collection, administration and planned use of MAT funds.

How much revenue does MAT generate?

In 2017, City Staff estimated the 4% MAT to generate approximately \$400,000 per year. The estimate is based on 60% occupancy.). Following the introduction of MAT, , the MAT tax generated \$200,000 in the six-month period of 2019. MAT funds were allocated to the development of the City’s Tourism Strategy and to the Tourism Reserve Fund (as shown below). As required by the Ontario Regulation, the City transferred \$100,000 to the DMMO *the Bay of Quinte Regional Marketing Board*.

MAT Revenue (2019 – 6-month period)	\$200,000
Remittance directly to BOQRMB	\$100,000
Tourism Strategy	\$30,000
Tourism Reserve Fund	\$70,000
2020 Tourism Initiatives - based on outcomes of the strategy and opportunities that present themselves	

What happens to MAT funds?

The Municipality uses the MAT funds generated from visitors to build our tourism sector and create jobs and investment in the City of Quinte West.

Ongoing communications with the tourism accommodators take place to identify how MAT funds can provide benefits. A task group of the Economic Development & Tourism Advisory Committee was established and included external stakeholders.

There is also an Accommodation & Attraction Stakeholder meeting bi-annually to discuss opportunities/challenges and provide updates on tourism activities and initiatives.

[Staff Report 19-024-MAT Implementation-April-2019 \(civicweb.net\)](#)

Timmins

About MAT

Based on the Timmins by-laws, Timmins MAT is implemented as follows (MAT [BY-LAW No. 2019-8306](#), memorandum [BY-LAW No. 2021- 8523](#)):

- Municipal Accommodation Tax (MAT) is **in effect since May 1, 2019, at a rate of 4%**.
- The tax applies to **short-term accommodation** – meaning accommodation for a continuous period of less than 30 days in a hotel, motel, lodge, inn, bed and breakfast, dwelling unit or any place an accommodation is provided.
- As per the Ontario regulation, Timmins' **short-term accommodations exempt from MAT** include: accommodation provided by universities, hospital, etc. For a complete list refer to the Municipal Act and Ontario Regulation 435/17 and MAT [BY-LAW No. 2019-8306](#).
- Fifty per cent (50%) of the net MAT revenue go to the municipality.
- The other 50% of the net MAT revenue go to a designated tourism entity identified by the City. The City of Timmins has **designated the Timmins Economic Development Corporation (TEDC) as the eligible tourism entity**. The TEDC is governed by a non-profit board with an economic development mandate that has long included a tourism portfolio.
- TEDC has established and manages **The Municipal Accommodation Tax Fund**. As per the Timmins MAT By-Law and an Agreement with TEDC 50% of MAT proceed the City of Timmins transferred to TEDC MAT Fund.
- **The MAT fund funds are shared across eligible for-profit and not-for-profit tourism initiatives and entities in the public and private sectors.**
- The fund is open to not-for-profit, for-profit, and mixed partnerships for tourism promotion in Timmins. Eligibility is based on the lead organization in the partnership.
- City of Timmins' **Tourism Development Strategy and Culture, Recreation and Tourism Master Plan** (2014, currently under review) **guide investment decisions** by the TEDC.
- Based on the TEDC fund instructions, **the MAT Fund funds can be used to add new amenities and experiences to add to Timmins' tourism portfolio**. Another benefit can be the **creation of employment opportunities in the tourism sector**.

Timmins Economic Development Corporation

Some municipalities have designated economic development corporations as eligible tourism entities for MAT funding distribution. Combining economic development and tourism promotion has been prevalent in Northern Ontario municipalities, including the City of Thunder Bay, the City of Greater Sudbury, Town of Hearst, the City of Sault Ste. Marie, and City of Timmins.

The economic development corporation should be eligible to receive MAT revenue, meaning it should be a not-for-profit organization with a mandate that includes tourism promotion in Ontario or in a municipality.

The Timmins Economic Development Corporation (TEDC) is a non-profit corporation, governed by the Board. TEDC is established for the purposes of economic and community development. Until the establishment of the Destination Marketing Organization Tourism Timmins, TEDC had been the municipality’s arms-length agency for tourism development.

TEDC administers MAT Fund that has a clearly defined funding distribution process and a transparent approach to MAT funding distribution to local entities involved in tourism promotion. Eligible entities include non-for-profit organizations, private organisations, and partnerships.

TEDC has established The Municipal Accommodation Tax Subcommittee (MATS) that works as a Sub-Committee of the TEDC Board. MATS provides advice, recommendations, information, and expertise in regard to MAT tourism investments. The MATS reviews the applications submitted to the MAT Fund and makes recommendations to the TEDC Board for projects that are aligned with a yearly work plan and Tourism Development Strategy developed by Tourism Timmins.

The MAT Subcommittee voting members represent the Timmins Accommodation Group (TAG); Tourism Timmins; the Timmins Chamber; the TEDC Board of Directors; the Venture Centre; and the BIA.– TEDC’s Director of Community Development is a non-voting member who prepare reports for TEDC Board and Director of Community Economic Development.

Timmins MAT Subcommittee Terms of Reference guide subcommittee’s decision making and MAT application evaluation and the investment of the net proceeds of the MAT Fund. The primary objective is aligned with the Timmins Tourism Strategy and Tourism Master Plan: to bring more visitors to the city and increase hotel occupancy rates.

Other objectives to guide investment of the MAT Fund are to enhance the local tourism economy by:

- 1. Increasing visitation to the City of Timmins;
- 2. Extending the length of stay of visitors;
- 3. Extending the economic yield per visitor to the City of Timmins;
- 4. Enhancing event and conference tourism bid and hosting;
- 5. Supporting new product development and capital in alignment with the Tourism Development Strategy;
- 6. Support a culture of service excellence within the tourism sector and the broader business community;
- 7. Communicate the importance of the tourism industry as an economic and social driver within the City of Timmins.

In 2021, five recipients received just over \$303,000 from the MAT Fund. In 2022, the MAT Fund supported \$376,360 supporting 11 tourism related initiatives, events, and organizations. The following table presents the 2022 MAT Fund Awards.

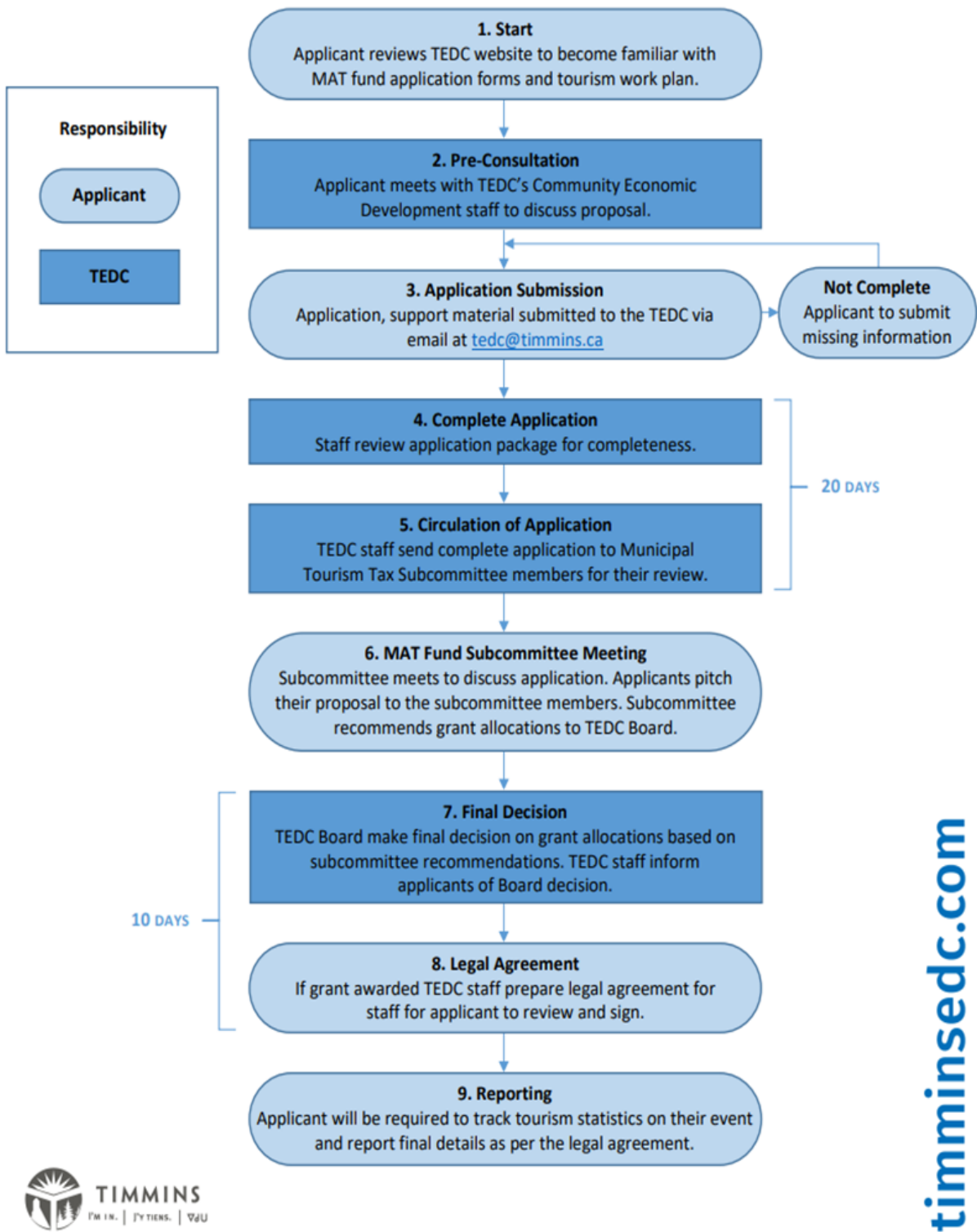
2022 Recipients

Total	\$376,360.00
1. Mushkegowuk Cup 2023	\$27,000.00
2. Canadian Pro Snowcross	\$25,000.00
3. Canadian Trade ex	\$30,000.00
4. Timmins Festival and Events 2022	\$200,000.00
5. Timmins Golf Championship 2022	\$7,500.00
6. Punjabi Cultural Music Fest	\$60,000.00
7. Timmins Bowling	\$7,000.00

8. Schumacher Lions Xmas Craft	\$11,200.00
9. Sister Fay Basketball	\$2,705.00
10. THVS Girls Volleyball	\$2,055.00
11. THVS Gold Cup Basketball	\$3,900.00

The exhibits below show a detailed process for MAT Fund applications and a list of evaluation criteria that guide MAT Subcommittee decisions.

Exhibit 3. TEDC MAT Funding Application Process, TEDC





705-360-2656 130 Spruce St. S., Suite 1
705-360-2679 130, rue Spruce Sud, bureau 1
Timmins, Ontario P4N 2M5

Timmins Municipal Accommodation Tax Fund - Evaluation Matrix

Rating 0 to 5: 0 incomplete, 1 very weak, 2 weak, 3 average, 4 strong, 5 very strong

TOURISM STRATEGY AND WORKPLAN	15 %
Do the organization and its proposed activities align with the goals of the City of Timmins tourism strategy and work plan?	
Is there a demonstrated need for the project or activities proposed?	
Is this a tourism-related project?	
ECONOMIC IMPACT	35 %
Does the project increase the number of out-of-town visitors?	
Does the project increase visitors spending?	
Does the project directly or indirectly increase overnight stays?	
Does this project secure new private sector tourism investment?	
Does the project enhance any of existing infrastructure or new construction (e.g. tourist facilities/ attractions?)	
Does the project support the creation of direct or indirect jobs?	
Does the project encourage partnerships between local organizations?	
EXPOSURE AND REACH	25 %
Does the organization have a marketing and promotional plan to key external markets and local markets?	
Does the project benefit the City of Timmins by increasing public awareness and understanding of the tourism sector?	
Does the project have potential to generate significant exposure for the City of Timmins?	
Does the project enhance the profile of the City of Timmins as a tourism destination locally and/or at the regional, provincial, national, and/or international level?	
Does the project enhance the competitiveness of Timmins tourism products and experiences?	
ORGANIZATIONAL EFFECTIVENESS AND FINANCIAL HELP	25 %
Does the applicant have a business plan and appropriate experience and governance in place to be successful?	
Does the applicant demonstrate responsible financial management through its past financial track record?	
Does the applicant demonstrate financial need? Is there evidence of an accumulated surplus?	
Is the projected budget balanced and realistic? Is it financially viable?	
Has the applicant demonstrated initiative or success in attempting to generate other revenue than the MAT Fund (e.g. fundraising, sales other grants etc.)?	

Please note not all questions will apply to each application.



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MUNICIPAL COMPARATOR REVIEW- FINDINGS

- Generally, across Ontario, Designated Tourism Organizations have allocated their shares of MAT to fund their eligible tourism marketing activities, to implement their projects and to support relevant events or marketing initiatives to support other organizations
- Relevant municipal strategic guiding documents such as municipality's Strategic Directions, Tourism Strategies, Tourism and Economic Development Plans, Recreation and Tourism Master Plans and other relevant plans should be in place and aligned to guide MAT revenue allocation and spending to support strategic goals regarding tourism and economic development.
- The spending of the municipal portion of the MAT revenue must have a clear and explicit connection to the benefit of tourism in the region. The process should be transparent and information publicly available. Ideally on the website pages dedicated to MAT.
- DMMOs should be transparent about their tourism promotion goals, objectives, strategic directions, and projects or activities supported through MAT funding. This information should be published on their websites and presented in a form of annual report, which could outline objectives for the year, MAT funding received and spent, projects supported through MAT funding and evaluation of results against objectives.
- If a DMMO distributes funds to other tourism entities, decision-making process, application process, application assessment criteria and results should be published on the publicly facing websites. At the end of each year, results should be presented in a format of an annual report.
- Both municipalities and tourism entities are expected to be financially accountable and transparent about MAT revenue distribution. As directed by the Ontario Regulation and may be outlined in MAT By-laws and agreements between DMMOs and municipalities, financial reports and, where applicable, audit results should be available to the industry stakeholders and the public. This applies both to municipalities and DMMOs that are tasked with distributing MAT funds.
- Greater transparency about decision-making and how MAT funds support tourism industry information and report communicated clearly through the websites (both municipalities and DMOs)

APPENDIX A – WAYFINDING SIGNAGE



APPENDIX B – HWY 6 AADT’S

Highway	Location Description From	Location Description To	Dist. (KM)	2019 AADT
6	DURHAM S LTS BENT SDRD27 START OF NA	DURHAM N LTS GLENELG TWP END OF NA	2.3	
6	DURHAM N LTS GLENELG TWP END OF NA	S JCT GREY RD 40 DAVID MCNICHOL PKWY	29.3	3900
6	S JCT GREY RD 40 DAVID MCNICHOL PKWY	N JCT GREY RD 40 CHATSWORTH START OF NA	1.1	4850
6	N JCT GREY RD 40 CHATSWORTH START OF NA	HWY 10 TORONTO & SYDENHAM STS	0.6	
6	HWY 10 TORONTO & SYDENHAM STS	OWEN SOUND S LT FOURTH ST START OF NA	11.6	9900
6	OWEN SOUND S LT FOURTH ST START OF NA	ALPHA ST 9TH AV END OF NA	3.9	
6	ALPHA ST 9TH AV END OF NA	GREY COUNTY MALL MACDONALDS ENT	0.7	17700
6	GREY COUNTY MALL MACDONALDS ENT	HWY 21 GREY RD 18	2.0	16800
6	HWY 21 GREY RD 18	CONCESSION 5 (W)	6.4	8450
6	CONCESSION 5 (W)	N JCT BRUCE RD 10 QUEEN ST BRUCE RD 8 (W)	7.6	7250
6	N JCT BRUCE RD 10 QUEEN ST BRUCE RD 8 (W)	WIARTON S LTS START OF NA	11.2	6450
6	WIARTON S LTS START OF NA	FORMER WIARTON N LTS END OF NA	2.0	
6	FORMER WIARTON N LTS END OF NA	S JCT BRUCE RD 9 COLPOY BAY RD (E)	2.1	6150
6	S JCT BRUCE RD 9 COLPOY BAY RD (E)	BRUCE RD 9 N JCT	26.9	3050
6	BRUCE RD 9 N JCT	LINDSAY TWP RD 30	19.9	2950
6	LINDSAY TWP RD 30	HWY CONTINUES IN TOBERMORY	26.2	1950
6	HWY CONTINUES IN TOBERMORY	SOUTH BAYMOUTH FERRY DOCKS		
6	SOUTH BAYMOUTH FERRY DOCKS	SEC HWY 542 (W)	12.9	550
6	SEC HWY 542 (W)	MEREDITH ST (E) MANITOWANING	17.0	1100
6	MEREDITH ST (E) MANITOWANING	SHEGUIANDAH HOWLAND TWP BDY	24.4	2050
6	SHEGUIANDAH HOWLAND TWP BDY	LITTLE CURRENT S LT L21 22 START OF NA	9.0	2650
6	LITTLE CURRENT S LT L21 22 START OF NA	LITTLE CURRENT N LTS END OF NA	1.6	
6	LITTLE CURRENT N LTS END OF NA	MANITOULIN SUDBURY DIST BDY	24.0	3350
6	MANITOULIN SUDBURY DIST BDY	FOSTER DR ESPANOLA S LTS START OF NA	20.6	3950
6	FOSTER DR ESPANOLA S LTS START OF NA	TUDHOPE ST (E) SHEPPARD ST (W) END OF NA	3.9	
6	TUDHOPE ST (E) SHEPPARD ST (W) END OF NA	HWY 17 HWY END	2.7	8650
6	HWY 17 HWY END	END OF HWY 6		
7	HWY 417 & HWY 17 IC	HAZELDEAN RD RMOC RD 36	2.5	18300
7	HAZELDEAN RD RMOC RD 36	DWYER HILL RD (N) DWYER HILL RD (S)	7.6	20000
7	DWYER HILL RD (N) DWYER HILL RD (S)	MCNEELY AVE (N)	10.8	18800
7	MCNEELY AVE (N)	HWY 15 (N) FRANKTOWN RD (S)	0.6	19300
7	HWY 15 (N) FRANKTOWN RD (S)	MISSISSIPPI RD (S) LANARK RD 29 TOWNLINE RD (N)	3.8	11400
7	MISSISSIPPI RD (S) LANARK RD 29 TOWNLINE RD (N)	LANARK RD 15 FERGUSON FALLS RD (N)	9.0	12300

APPENDIX C – STAKEHOLDER ENGAGEMENT

South Bruce Peninsula – Stakeholder Engagement

Monday June 12, 2023

Attendees: Robert Trask (MATA Chair), Alex Hogan (RTO7), Jennie and Robbie Robinson (Robbie Broadcasting), Kim Clarke (RTO7), Sarah Mann (Red Bay campground), Lee deLang (Marketing and Communication firm)

MGA – Tracey McQueen, Jennifer Reynolds, Diane English.

1. Tracey welcomed the group and introduced the MGA team.
2. Robert provided a welcome and on behalf of MATA.
3. The agenda was reviewed with options to post in chat, reminder about Thursday's session and the Survey timeline.
4. What areas of South Bruce Peninsula do your visitors come to and why?
 - Camping, nature opportunities
 - Trillium hunt, rare orchids
 - On "bucket list for many"
 - Photographers
 - Day trips with hikes, beach, visit to markets.
 - Some stay in SBP and some travel north to Tobermory
 - Campground has mostly seasonal with some overnight stays; visit Spirit Rock, Caves, Skinners Bluff (lots of repeat business)
5. What do you (or your visitors) think are the gaps in tourism in South Bruce Peninsula?
 - Ability to draw visitors to come (KW, Guelph, and Toronto) to visit, and then decide to move and start a business.
 - Large area to reach – SBP, including Wiarton, SB and lots trying to connect (Warton BIA, Chamber, RTO) so Radio CFOS very strong in Bruce and Grey, promoting Wiarton Willy, Ribfest, Wiarton Wednesday, camping, marinas, vendors.
 - Retail would like to see year-round business.
 - Promotion to potential employees to the Bruce and Doctors; lakeside living, lifestyle, family options but a very competitive market. Promoting to families includes same assets as promoting to tourists.
 - Lack of available real estate.
 - Consistency and availability. (Some people think you can just arrive and book)
 - Expectations of visitors (Uber, bank machines in campgrounds)
 - Shoulder season very hit and miss – after Labour Day, very weather dependent.
 - Workforce.
 - Housing
6. What are the most important special events held in South Bruce Peninsula, and is their capacity for more?
 - Wiarton Willy over 60 years old
 - Also, Wiarton Maple Fest and Rotary Fair
 - Sand Fest in SB (draws more people)
 - Approximately 100,000 people in SB on any given weekend
 - Could be more events of a Wiarton Willy scale; COVID impacted.
 - Need to build up before and after the event and not just the day of the event (need to line up all – event, food and beverage, accommodation) – Volunteers an issue.
7. Poll – Ideas to showcase SBP tourism assets.

- Key is to get them here.
- Camping and Adventure lifestyle/trails had 3 votes, Beach had 2.
- Shopping, Special Events/Music Events, Cycling and Winter activities each had 1 vote
- After the first few days' stay people need something to do.
- No stopping people driving up #6 on Friday night, maybe catch on way back home.

8. What could MATA/SBP do?

- Financial support was offered previously to merchants.
- Was an onerous process as they needed to collect postal codes, plus take customer service training.
- Radio campaign has helped them. But radio spots are costly, and some needed small subsidy.
- Talk radio (CFOS) and Country 93 were both informative.
- As a tourist, cycling trails is great but need some shared marketing materials (Ride the Bruce) at locations in GTA bike shops and outfitters.
- Take a vendor booth – Cottage Life, Sportsman Show, Bike Shows etc.

9. Poll – priorities.

- Staff development and recruitment (3), Marketing, infrastructure, Product/Experience development (2 each), off season incentives (1).
- Challenge with young staff – get trained, SMART serve and then leave.
- Need to promote the industry as a career and educate that customer service skills, food handling skills etc. can be useful in other career pursuits.
- Potential to work with post-secondary to encourage culinary, internship ideas, onsite training.

10. How could MATA help?

- Story based commercials – more than six words on a sign while driving no impact.
- Potential ideas to help all (not just SB and Wiarton, but rural too)
- Need to increase awareness – “don’t know, won’t go”, present area as a destination.
- Need enhanced social media and targeted campaigns to various demographics.
- Segment audience and intersect with multi-media campaigns on what SBP assets have to offer. (Paid advertising, radio, social media)
- Consider targeted audiences (Asian market?) although some felt they are day trip bus visitors only.
- Consider options to capture individual email addresses through a sign-up option and target to database directly.
- Ways to reach watercraft visitors – Wiarton Marina, Oliphant Marina, Sauble Beach River.
- Need to be clear that the number of visitors has to equal the capacity to provide required services.

South Bruce Peninsula – Stakeholder Engagement

Thursday June 15, 2023

Attendees:

Joe Vanderzand Director Wiarton Chamber of Commerce, Board member, Deep Water Gallery

Christine Arezzi Bluewater Lavendar Farm, Wiarton

Jan Lai FCLMPB (Four County Labour market planning board)

Dana Sousi, Executive Director, FCLMPN

Jeff Loney, Manager, EC Dev Bruce County (DMO for County)

Mat - Red Bay Lodge

Tori Matichuk Ec Dev Officer, Bruce County (focus on tourism and “Explore the Bruce”)

Robert Trask, MATA Chair (welcome only)

Shelby, Sauble Beach Resort Camp

MGA – Tracey McQueen, Jennifer Reynolds, Diane English.

1. Tracey welcomed the group and introduced the MGA team.
2. Robert provided a welcome on behalf of MATA and noted how important this project (five-year plan and one year action plan for MATA) was. He noted he could not stay on call due to an RTO7 Board meeting.
3. The agenda was reviewed with options to post in chat.
4. What Areas of South Bruce do your visitors come to and why?
 - weather good, Sauble Beach and Bruce Peninsula as a whole
 - rest of year Bruce Pen and Wiarton (45 min drive across)
 - good beach days SB
 - lavender farm just opened in 2021 will track as they open up where visitors come from
 - Bruce Trail
 - Red Bay beach
 - Beaches
 - Bruce county – any data available – “econ impact of tourism report” – over 600 visitors surveyed and input from business – will share reports they completed prior to pandemic with much traffic from KW, GTA but during pandemic – more from right in the Peninsula.
 - Sauble Provincial Park and falls
 - Downtown Wiarton and Bluewater Park
 - Spirit walk Conservation Area
 - Cape Croker Park – Bruce trail, indigenous experiences
 - Chesley lake, fishing at inland lakes by Oliphant
 - 40 % 90 min drive in winter; based on survey
A lot GTA, Collingwood and Georgian Bay area
 - Grey and Bruce County – under utilized market to Bruce Peninsula
 - Bruce Pen is the best tourism asset not just SB – therefore hard to build an economy around it – GTA peak, but local drive market in 2-hour radius key overall.
 - how is data collected – County – survey on the ground or online previously.
 - RTO has done work with downtown core using phone data.
 - Going forward – will note their residency or postal code if visiting.
5. What do you or your visitors, think are the gaps in tourism in SBP?
 - 2 months business unsustainable over the other 10 months – infrastructure and staffing impossible, need more people to live here, more dwellings and ways to keep people, how to survive thru winter.
 - trying to promote the Bruce in off season, but if they come at this time to visit, need food and beverage and accommodation to welcome everyone; therefore, hard to convince businesses to stay open – “chicken and egg”.

- Example - If beaches crowded and not enough WCs, enough restaurants, places to stay
- Some book in SBP but head north to Tobermory
- Snowshoeing, snowmobiles, ice fishing off season options.
- Wiarton has opened some new restaurants.
- events are largely volunteer led and a challenge with volunteers, and businesses open but “mom and pop” operations, no staff – not sustainable.
- How to get more staff, enough \$\$\$ to afford to stay but a shortage of people to deliver services people want.
- Winter market (snowshoe, snowmobile) difficult market due to weather changes unless increase targeted weather-based market – no longer a reasonable market.
- Need to build around WW festival, maybe add Christmas or concert weekend = need a draw otherwise people not coming in the winter as it is not sustainable (unpredictable weather).
- specific demand generators in peak season (i.e., SB), but need to develop a demand generator that is NOT weather dependent – across province changing weather not dependable; natural assets and existing features mixed with something not weather dependent (i.e., Blue Mountain just a ski hill before village developed)
- Need a vision to be created and then start to work on it.
- Consider an off-season educational tourism partner with Parks Canada – schools and post secondary to come on mass to the region – experience and learn about nature and drive people here, come to learn.

6. What are the most important special events held in SBP?

- Wiarton Willy
- Local area events – chamber, service clubs but not massive draws
- But July and August don’t need a big, massive draw.
- Car shows, farmers markets, smaller events, and smaller draw
- Sand fest in SB
- Question if people are coming for events or coincidental to their visit?
- Campgrounds – repeat customers for events specifically but occasional visitors may not know stuff is happening, but they do try to promote on website and calendars etc.
- Need more promotion – Tuesday car show, live music etc. but many think nothing going on – provide live music every night.

7. What ideas do you think could showcase SBP Assets (poll)?

Water 2

Beach 1

Shopping 1

Culinary 2

Rec/trails/adventure 7

Bluewater 1

Cycling 1

Winter 1

Other – experiential business offerings (on farm)

- unparalleled nature and wildlife, Immersion with nature (bears, bald eagle, osprey nest, snakes, turtles)

- Promoting SBP as your home base with whole Peninsula to explore

8. What could MATA / SBP do to help?

Train in culinary, service, hotel industry in off season and then use skills in industry but need to partner for satellite campus idea.

Develop a strategy for labour shortage – workforce development a core pillar, attraction and retention – recruitment “jobs in Bruce” platform, “shift yourself for shift workers” (withdrew program due to lack of support/awareness) but have money, funding and resources, also County is Service System managers for Province to get job seekers and business link to link; resident attraction also a focus (tourist first, and then attract to live seasonally, and then permanent (flow) and then their next generation after that).

Integrated solutions needed but not a short-term fix.

Can MATA partner to create measurable impact?

Keeping youth in the area.

Even at high school area – leaving to go to Owen Sound for school (culinary, woodworking – losing even at a high school level, trade schools etc.)

Need stakeholders to come to the table – identify problems, create solutions, and bring stakeholders to the table – if not helping at that level, then we have failed with MATA (has cost more). Need help including operating support into off season, staffing into offseason - not just more signage.

During peak times, digital ads just a dip in big pot – incent people (\$\$\$) so food and beverage establishments stay open – pay them, need specific operational solutions, 20% matching operational expenses, local operators are busy and no time to do social media. Contract a summer content creator student whose core job is to promote every business over and over. County cannot do it for individual businesses - but MATA could on social media for all businesses (Owen Sound River district is doing it now), Signage and stuff, off season ok, but MATA needs to address real problems.

Operating off season and staffing where they live.

Can a grant offset operating cost (heating, lights on)?

Writing grants for small O/o – when relying on volunteer help.

Need product and experience development opportunities, broad training and get involved with business – how to diversity and bring in more revenue when people DO come – up the revenue potential; Bruce County would be happy to support “business to Bruce program” – lots of resource for business development to help with actions and implementation.

9. Priorities (poll)

Staff recruitment/retention 6

Off season 5

Transportation 1

Tourism infrastructure 4

Product / experience development 5

10. How could MATA help you with priorities?

- Will give direction on the challenges to MATA – then they execute.
- No on the ground support at RTO level.
- Need contract staff to execute vision on the ground.
- i.e., How to recruit 40 people to come and work in SBP in the summer.
- Idea - Go to ski town and get people to work summer – for example - winter in Whistler and summer in Bruce Peninsula.
- Local O/O could support.
- Hiring and importing of 40 different people would help take pressure off and help smaller operators with their staff needs.
- Take a lead – housing, options to address barriers to use as housing (due to not meeting code, allowing trailers etc.) consider staff camp with lodge and tents, yurts.
- Need to get all jurisdictions together to address the real issues.
- Creative way to host an industry night and recruit needed staff (bar tenders and line cooks).
- Some will offer to take the lead to get the idea launched.
- Federal Government (Immigration) providing “working holiday visas” – young people can come – Canadians are going in other places working 2 six-month jobs – Bruce County has not taken up on it yet.
- Need a sense of place – culture of this group from other countries to see Bruce County and Peninsula to be a place of choice so need housing and places to stay.
- Housing key gap – get them on board.
- Town of SBP owns property – bring money and offer to build and then staff camps with all partners part of it; transport staff as needed.
- Need MATA to be lobby group and use money to create solutions.

11. Next steps

- Second one this week, seeing themes and possible solutions.
- Online survey to seek continued input, validation.
- Chicken and egg discussion – need to map it out.

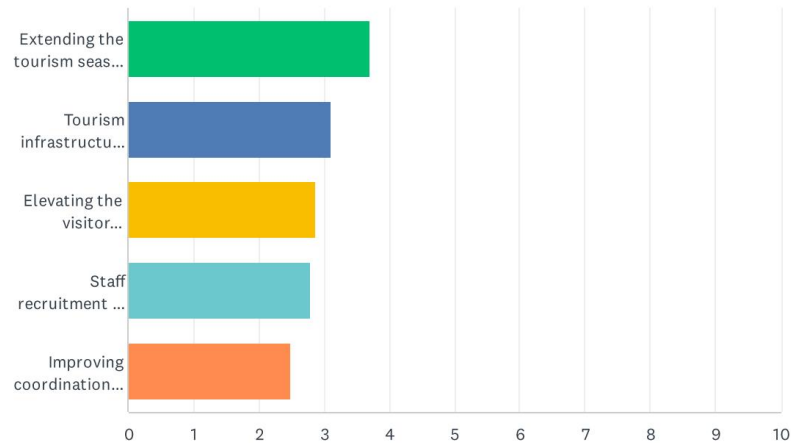
MATA not solution for all priorities – need to work in partnership.

APPENDIX D – SURVEY RESULTS

South Bruce Peninsula MATA Survey

Q1 QUESTION 1: Based on the initial industry stakeholder engagement feedback received, five main areas of focus (or pillars) have been identified to support growing a sustainable tourism sector in South Bruce Peninsula. Please rank these pillars according to their importance (with 1 being most important and 5 being least important). To place the choices in the desired order, simply drag the line or use the arrows next to the text.

Answered: 34 Skipped: 1



	1	2	3	4	5	TOTAL	SCORE
Extending the tourism season outside the summer season (e.g. initially by one month on either side, or building on special events and/ or feature dates, etc.)	32.35% 11	26.47% 9	23.53% 8	14.71% 5	2.94% 1	34	3.71
Tourism infrastructure (e.g. washrooms, parking, garbage receptacles, signage, etc.)	20.59% 7	20.59% 7	20.59% 7	26.47% 9	11.76% 4	34	3.12
Elevating the visitor experience and increasing return visitation (e.g. developing opportunities for guided/paid activities, increasing opportunities for increased tourism spend, increasing customer service, etc.)	20.59% 7	23.53% 8	5.88% 2	23.53% 8	26.47% 9	34	2.88
Staff recruitment and housing	23.53% 8	11.76% 4	14.71% 5	20.59% 7	29.41% 10	34	2.79
Improving coordination and communication to maximize resources (e.g. cooperative marketing campaigns, group purchasing, consolidated tourism websites, etc.).	2.94% 1	17.65% 6	35.29% 12	14.71% 5	29.41% 10	34	2.50

Q2 Staff recruitment and housing

Answered: 24 Skipped: 11

#	RESPONSES	DATE
1	Support development of alternative housing arrangements; ie. working with landowners and the town to expedite permits, etc., for those willing to build staff accommodations or adapt current spaces to this purpose.	7/4/2023 4:11 PM
2	Difficult in sauble beach without services to support employee housing.	7/4/2023 12:20 PM
3	additional tax levy on STAs to fund staff housing . STAs have taken away previously used seasonal staff housing; STA owners need to pay for replacement housing rental as they are making high revenues from tourism, not all taxpayers.	7/4/2023 11:57 AM
4	Grants for people investing in housing for staff (coupled with town zoning support) Grants for recruitment fees (indeed fees, etc.) Training subsidization	7/3/2023 5:01 PM
5	have designated campgrounds for staff	7/3/2023 12:09 PM
6	Businesses collaborate to house our separate staff in the same space.	6/26/2023 5:40 PM
7	allow staff housing on property ie trailers, tents, yurks	6/23/2023 8:04 AM
8	1. Offer free parking pass for employees. 2. Offer incentives for landowners to rent or room/board staff for the summer. 3. Encourage rideshare programs with other people coming to the area daily.	6/22/2023 11:40 PM
9	Allow temp camper trailer for independent living and share the bathroom in the house and kitchen if cooking is required.	6/22/2023 9:11 PM
10	That is not something MATA should be considering.	6/22/2023 7:18 PM
11	I think continuing with bus routes is essential. If we had a direct bus Owen Sound to Sauble would help tremendously	6/22/2023 4:57 PM
12	Wish i had a answer. We have increased wages substantially this year with limited success. Maybe some sort of assistance program to higher 14-16 year old so we can afford to coach and train them?	6/22/2023 3:45 PM
13	Gas, accommodations subsidies/incentives for staff	6/22/2023 12:52 PM
14	Staff Housing on the Peninsula is a difficult question to address due to STA's wanting the higher revenues in the peak seasons. In large resort areas (Banff, Whistler etc) the employers often have staff housing at reduced rates.	6/22/2023 9:44 AM
15	I think you need to pick one thing and do it well. \$200,000 is a lot of money, but not as much as you would think it is at the same time. If Spead out over the 5 areas, it is just enough money to accomplish almost nothing. Pick one area invest some money and do it well, then next year do a different something different.	6/22/2023 9:34 AM
16	We need people who are excited about promoting Wiarton and their unique businesses.	6/21/2023 11:48 PM
17	The main issue I have in the non-profit sphere is finding volunteers to keep doors open. We haven't enough young people living here to fill Young Canada Works grants, and sometimes we get no applicants. We cannot get operating grants to hire staff. Volunteer burnout is an unfortunate reality. Staffing needs to be addressed, either through direct funding, or through the sharing of resources.	6/21/2023 9:00 PM
18	Short term rentals deeply impact the availability of permanent housing in the area, and demand drives up cost of living for permanent residents. Without affordable housing, the working sector finds the area unattractive. No workers = no businesses. Limiting STRs on a permit system, or incentivizing home sharing to people working locally, would strength the work force by attracting candidates who are driven by affordability. Issue tax credits to single home property owners who can prove they are renting out their property full time. Develop a database that	6/21/2023 8:26 PM

	connects these landlords to vetted renters. If workers are attracted to the area, tourism will thrive. But without affordable housing for our working sector, we will flatline.	
19	Wouldn't suggest spending money on this	6/21/2023 6:48 PM
20	Work with Planning to easily make changes to zoning and bylaws to allow for changes in housing developments, rental units, granny flats, etc. Provide subsidies or signing bonuses for out-of-town employees who move to SBP to work. Encourage employers to pay 'living wage' (not minimum).	6/21/2023 4:28 PM
21	Focus on marketing of seasonal jobs to seasonal residents both youth and retired who already have summer accommodation here.	6/21/2023 11:44 AM
22	subsidized staff rent tiny home staff village	6/21/2023 9:48 AM
23	We are a two person business so this doesn't apply for us	6/20/2023 7:33 PM
24	subsidize rental properties for staff housing	6/20/2023 4:40 PM

Q3 Extend the tourism season outside the summer season

Answered: 26 Skipped: 9

#	RESPONSES	DATE
1	Develop/support the development of "Keystone Events" that take place outside of summer - for instance, the Peninsula Bruce Trail Club is running a Hiking Festival on the weekend after Thanksgiving; this could bring tourists to the area who may decide to come on Thanksgiving weekend and stay through the week, if there was a coordinated push to let people know what else was happening.	7/4/2023 4:11 PM
2	End the cartoony Wiarton Willie. No one cages animals anymore; public is against that. Instead hold a winter festival.	7/4/2023 11:57 AM
3	incentivize businesses to stay open later with a grant to help offset staffing costs coordinate agreement between businesses to stay open later Shoulder season events, coordinating advertising for same	7/3/2023 5:01 PM
4	october - fall colours and nature hikes	7/3/2023 12:09 PM
5	Marketing. More shoulder moth activities promoted ie 4 wheeling, hiking, certain kinds of birds to see at that time, fall leaf colours, Art tours, more boat tours, educational programs ie. learn about edible plants to harvest in fall etc., Motels to offer more package deals for groups during shoulder months, Indigenous education ie food, making traditional art etc, collaborate with the restaurants or brewery's to make our own festival ie. "Taste Sauble Beach", Hot air balloon week from the beach etc., Chilli cook off, steal a popular festival idea from other municipalities that would work in this area	6/26/2023 5:40 PM
6	Create events. Adverize	6/25/2023 7:42 AM
7	just try one month - october for the colour of the trees	6/23/2023 8:04 AM
8	1. Public washrooms open earlier in the spring, later in the fall. As well as having garbage receptacles out earlier/later in the year. Open Sauble Falls parking earlier/later. 2. Hire a social events persons - run music & events. 3. Encourage business to market a 'package' to customers. ie 2-night stay with a \$100 food & \$100 shopping voucher	6/22/2023 11:40 PM
9	Ontario wide ad campaign.	6/22/2023 9:11 PM
10	Support new events/ experiences on the shoulder season	6/22/2023 7:18 PM
11	Events coordinator	6/22/2023 7:13 PM
12	It is difficult November to March for anyone to stay as many accommodations are not open. Extended Events in September, Oct & early November as well as April, May June would help boost visitors to the area	6/22/2023 4:57 PM
13	Larger events like snowmobile races but can not work when most businesses are closed up for season. we know Sauble Speedway is trying to but limited success. Takes time to build these events so a one yr. deal will not work.	6/22/2023 3:45 PM
14	Events scheduled outside of summer Grants for amenities/events outside of summer	6/22/2023 12:52 PM
15	Have the larger events such as Sauble Sand Fest in the shoulder season (June or September). Sauble is already busy in July and August without additional events.	6/22/2023 9:44 AM
16	Make some fun experiences for families like having a movie night at the arena once a month or paint willies foot prints on the sidewalk for a shop / discover the town trough a map or app ...make it interactive wake up Willie a-#wakeupwillie etc	6/21/2023 11:48 PM
17	We need more high-quality events in the shoulder seasons, especially in the fall when the weather is still warm. We need high-end boutique accommodation that's open in the winter. We might get people to stick around longer than one day during Williefest.	6/21/2023 9:00 PM
18	More to attract "shoulder season" tourism, especially as it widens and we find a longer	6/21/2023 8:26 PM

South Bruce Peninsula MATA Survey

	temperate season.	
19	Fund events only in that time period	6/21/2023 7:37 PM
20	Promote or create activities examples such as fall/spring festivals, ice fishing infrastructure, guided cross country skiing/snowshoeing (including renting equipment)	6/21/2023 6:48 PM
21	Incentivize businesses to stay open outside of the summer season. Visitors who come in the shoulder/winter seasons will leave if there are no businesses open to support them. Educate the businesses on the importance of 'they will come when they know you're open.' We cannot attract more visitors during these seasons if the amenities are not available.	6/21/2023 4:28 PM
22	Greater emphasis on winter camping as well as excellent cross-country ski trails in the municipality.	6/21/2023 11:44 AM
23	fall and winter festivals with accommodation and other business partners enticed to stay open or open specifically for event	6/21/2023 9:48 AM
24	Sauble Beach community mainly attracts people during summer months to enjoy the water.	6/20/2023 8:29 PM
25	Increased options of things to do and marketing to the GTA to let them know the Bruce is still open for tourists!	6/20/2023 7:33 PM
26	Offer events to bring in tourism outside of the typical summer season	6/20/2023 4:40 PM

South Bruce Peninsula MATA Survey

Q4 Tourism Infrastructure

Answered: 27 Skipped: 8

#	RESPONSES	DATE
1	Washrooms are the biggest. Waterfront and near tourist draws in some other tourist areas I visit (anecdotally) have better facilities, open for more of the year.	7/4/2023 4:11 PM
2	Eliminate seasonal camping sites at Bluewater park and install yurts that people can rent daily/no more than weekly. It's the tourists that buy; not the local people who just use the park as their private waterfront.	7/4/2023 11:57 AM
3	More signage, communicating beach rules and expectations	7/3/2023 5:01 PM
4	washroom are essential, improved website that has everything improved water and waste water in Sauble Beach for operators	7/3/2023 12:09 PM
5	Public Bathrooms	6/26/2023 5:40 PM
6	Washrooms.	6/25/2023 7:42 AM
7	washrooms are needed to make the experience nicer	6/23/2023 8:04 AM
8	More washrooms, more parking. Perhaps a Parking lot outside of town with a shuttle. Water & sewers. Bike share rental program like Toronto	6/22/2023 11:40 PM
9	Bathrooms downtown and along beach. Advocate for a transferable resident parking pass. I own a house and rent it. I should be allowed a parking pass for the house, not just owners	6/22/2023 9:11 PM
10	This should be the town, not MATA	6/22/2023 7:18 PM
11	The town should be responsible for garbage & washrooms with paid parking.	6/22/2023 7:13 PM
12	I believe that infrastructure is a TSBP responsibility. If the TSBP is collecting 50% of MAT then they should be directing a good portion of that money back to the areas that are generating that tax. Without good visitor experiences, we will see a decrease in visitors. More washrooms, recycling, more garbage bins, picnic areas, umbrella/shade areas	6/22/2023 4:57 PM
13	Work with existing facilities to try and bring in bigger events. Problem with big events is a lot of risk but must be a way to share risks with revenue share etc.	6/22/2023 3:45 PM
14	Create a historical center of Saubles history from the 1950's on.	6/22/2023 2:21 PM
15	The other 2% of the MAT collected should be put towards infrastructure. MATA's 2% should be towards promotion.	6/22/2023 12:52 PM
16	Better signage, updated washroom facilities that are kept cleaner than they have been during peak usage periods. Better roads into tourist spots like Bruce Caves, Blue Water Park boat launch area etc..	6/22/2023 9:44 AM
17	Get people interested In our town. Share the history of Wiarton through videos, story telling etc. Promote the stores we do have by involving them in the process.	6/21/2023 11:48 PM
18	Wiarion needs public washrooms downtown, with signage. The toilets behind the town hall are the "secret toilets." Nobody driving through town knows about them. The washrooms in blue water park are not good enough. There need to be good, clean washrooms in the park and downtown. This makes people want to stop and stay a while.	6/21/2023 9:00 PM
19	Take over the management of current facilities to give municipalities a financial break.	6/21/2023 7:37 PM
20	Extending or providing more garbage/recycling pick up	6/21/2023 6:48 PM
21	Put funding towards: installing washrooms in high trafficked areas; staff to maintain and clean washrooms regularly to keep good visitor experience; install more garbage cans in high trafficked areas and pay to remove more frequently; work with highways / MTO to improve roads (ex. make turning lanes where appropriate); build new infrastructure at public attractions	6/21/2023 4:28 PM

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and (existing or new) demand generators that are not currently capitalized on (ex. viewing platforms, parking lots, tours/experiences); build safe entry/access points along the Sauble River (parking, slopes, foot access, etc.) where there used to be more opportunities to safely enter.

22	Winterize more facilities to accommodate shoulder season visitors.	6/21/2023 11:44 AM
23	year round washrooms and waste receptacles	6/21/2023 9:48 AM
24	Washrooms and garbage and recycling needed. Maintain beach with morning raking and picking up trash. Make available food cart and truck licences to maximize tourist spend.	6/20/2023 8:29 PM
25	Maintenance of the washrooms in downtown Sauble	6/20/2023 7:33 PM
26	Stop screwing independant one property little guy owner STR's where this is their only source of income. Include campgrounds, hotels, motels, and other commercial accommodations in the MAT!	6/20/2023 4:50 PM
27	install more washrooms and infastructure to handle the large crowds - hire staff to keep the areas clean	6/20/2023 4:40 PM

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Q5 Elevating the visitor experience and increasing return visitation

Answered: 22 Skipped: 13

#	RESPONSES	DATE
1	Eliminate on street parking on Berford; its dangerous. Detour drive thru traffic to Gould.	7/4/2023 11:57 AM
2	Communicating beach rules and expectations Grants for events in Sauble Beach	7/3/2023 5:01 PM
3	improving the expectation of your visit to Sauble Beach. things to do when raining. Perhaps at the Warton Arena or Sauble Beach community centre	7/3/2023 12:09 PM
4	Extra staff allows owners & staff to have more patience and time to provide that extra step to great customer service.	6/26/2023 5:40 PM
5	Fear of excessive unfair policing	6/25/2023 7:42 AM
6	getting the other things in place the experience will elevate naturally.	6/23/2023 8:04 AM
7	Less focus on parking tickets, more focus on drinking, vandalism, graffiti etc. Paint budget to cover graffiti. Planters (heavy or fastened, unable to be moved/kicked over) More lighting downtown. More police presence. Speed bumps at Main & Lakeshore Blvd. (prevent people from spinning their tires around the corner) More signage regarding parking, what is TSBP and native, where washrooms are, etc.	6/22/2023 11:40 PM
8	Do the above and visitors will return.	6/22/2023 9:11 PM
9	Hire an tourism/ events coordinator...with qualifications	6/22/2023 7:18 PM
10	Events coordinator.....Some one trained and with the qualifications.	6/22/2023 7:13 PM
11	See my above comment. If visitors are not treated with their experience as number 1 in our mind, then why would they choose to return.	6/22/2023 4:57 PM
12	Honestly we are at a disadvantage with having Mata Tax to most of Ontario today. Hear a lot of complaints that it applies to camping. Realize program is new but don't see were we are spending the money that is helping.	6/22/2023 3:45 PM
13	More activities for families. Daytime for children and night music for the whole family.	6/22/2023 2:21 PM
14	Free Parking or one parking pass for the entire municipality or Peninsula may go a long way. Tourist don't enjoy paying for parking everywhere they go. As an example if they go to Bruce Caves, then to Spirit Rock Conservation, then to Sauble Beach, to Lion's Head, and then to Tobermory, they have to pay each time. They get tired of opening their wallet at every turn.	6/22/2023 9:44 AM
15	Get people to connect with a store that they have not been to... make a project they are promoting.... Eat at a new restaurant.... Purchase a new clothing item... warton needs to create a buzz about their brand ... and unique stores that are in the down town. Do the town staff know what stores have to offer ?	6/21/2023 11:48 PM
16	Things like museums, galleries, live music, diverse food choices, shopping, markets and fun events are required to make a town interesting and to make a town a repeat destination. These things need to be marketed aggressively.	6/21/2023 9:00 PM
17	Focus on quality events outside our busy season only.	6/21/2023 7:37 PM
18	Work with local businesses on product and experience development to provide more options for visitors and encourage longer stays and more spending. Provide funding, training, hands-on assistance to encourage these expansions. Bring public-private tourism assets together for partnership opportunities. Remove the rigorous by-laws and encourage them working together for the greater goods of both parties.	6/21/2023 4:28 PM
19	Provide refresher customer service training to long-time tourism operators to enhance the experience.	6/21/2023 11:44 AM

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20	More water activities like the water park idea.	6/20/2023 8:29 PM
21	This is something for tourism experts to figure out	6/20/2023 7:33 PM
22	offering more events, fun programs, live music festivals	6/20/2023 4:40 PM

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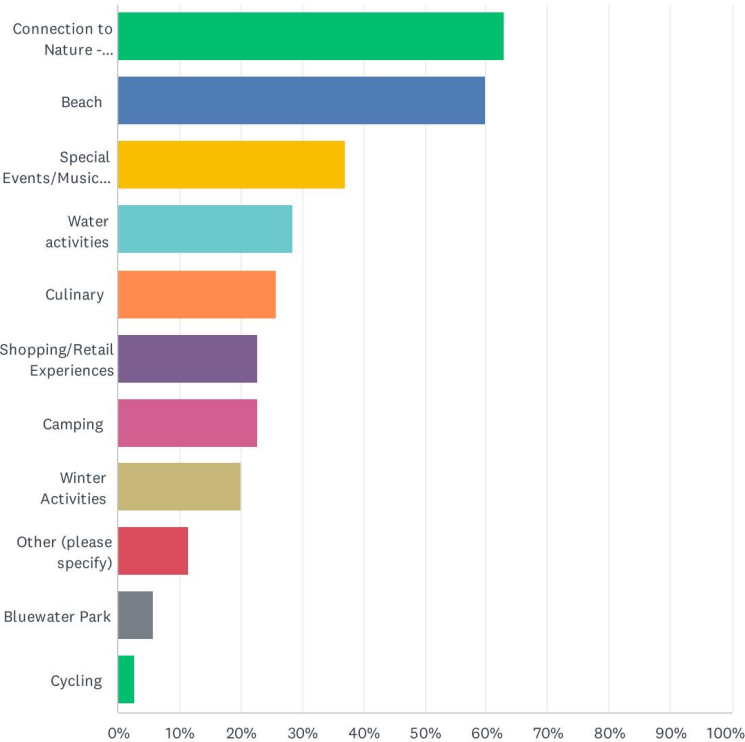
Q6 Improve coordination and communication to maximize resources

Answered: 19 Skipped: 16

#	RESPONSES	DATE
1	Work with local radio, news media to ensure organizations know how to get their info on community calendars, etc. Subsidize fees where necessary to ensure that interesting, valuable, but perhaps not lucrative tourist activities have access to these spaces.	7/4/2023 4:11 PM
2	Partner with NNBP	7/4/2023 11:57 AM
3	Communicating beach rules and expectations Shoulder season business coordination	7/3/2023 5:01 PM
4	too many fish in the ponds, too many dollars spent on administration, always doing studies no action. How many staff does rt07 have and what have they done for me	7/3/2023 12:09 PM
5	Mayor hiding. Not upfront.	6/25/2023 7:42 AM
6	to many people involved - MATA RT07 and Explore the Bruce. I had a hard time figuring it out and so much wasted time and money. Plus if we ask for money it takes too many hours to met all there criteria's...I just do it on my own rather than do the paperwork. Reduce staff at Rt07 they do not help south bruce	6/23/2023 8:04 AM
7	Monthly communications to the business community. Student employees (2-4) that can walk around as Information Guides for people visiting.	6/22/2023 11:40 PM
8	Create an app for str owners with resources and payment of mat tax	6/22/2023 9:11 PM
9	Hire the tourism coordinator to make this easier.	6/22/2023 7:18 PM
10	Essential for the visitors to have access to updates on Events, places to visit while in the area. QR codes for direct links to tourism websites would be beneficial for easy retrieval of information for our visitors	6/22/2023 4:57 PM
11	Coordination of website/social media. Chamber of Commerce try's but not enough resources. Needs to be announced now for next season and can not be last minute.	6/22/2023 3:45 PM
12	One good all inclusive website (events, accommodations, dinning, attractions... similar to Explore the Bruce but it needs to be kept up to date) is more effective than 5 smaller websites.	6/22/2023 9:44 AM
13	I would like to see the town get more involved with visitor experiences though a business that is operating in town	6/21/2023 11:48 PM
14	I work with Deep Water Gallery. It has no paid marketing staff, no paid staff whatsoever. That limits what we can do. We need manpower to keep tourist doors open and continue providing quality, educational and diverse arts programming.	6/21/2023 9:00 PM
15	Nothing. It's not important to me.	6/21/2023 7:37 PM
16	Bring together tourism stakeholders and partners to work on building the cohesive communication and understanding of how to promote and support tourism within SBP. Assign and align each role within tourism so there is no duplicate work, missed opportunities, etc. Coordinate these conversations.	6/21/2023 4:28 PM
17	Develop shoulder season marketing campaign that would promote year-round experiences.	6/21/2023 11:44 AM
18	With whom? If you mean tourist businesses then you can use emails and or newsletters in the tax roll.	6/20/2023 7:33 PM
19	marketing the benefits of visiting Sauble Beach	6/20/2023 4:40 PM

Q7 QUESTION 3: South Bruce Peninsula offers a variety of visitor experiences. In your opinion, what do you think are the top three visitor experiences South Bruce Peninsula should focus on?

Answered: 35 Skipped: 0



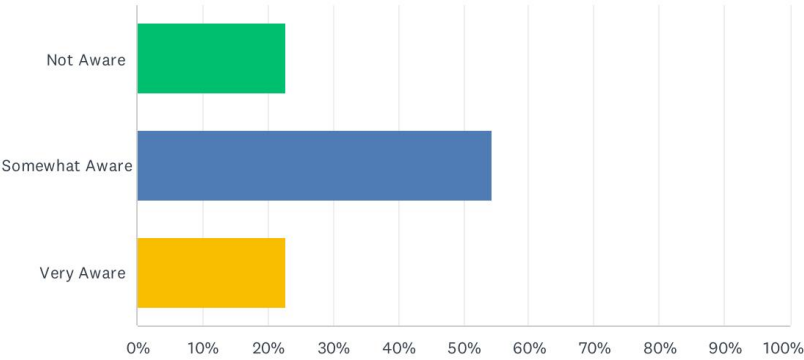
South Bruce Peninsula MATA Survey

ANSWER CHOICES		RESPONSES	
Connection to Nature - Recreation/Trails/Adventure Lifestyle		62.86%	22
Beach		60.00%	21
Special Events/Music Events		37.14%	13
Water activities		28.57%	10
Culinary		25.71%	9
Shopping/Retail Experiences		22.86%	8
Camping		22.86%	8
Winter Activities		20.00%	7
Other (please specify)		11.43%	4
Bluewater Park		5.71%	2
Cycling		2.86%	1
Total Respondents: 35			

#	OTHER (PLEASE SPECIFY)	DATE
1	Waterpark	6/24/2023 1:38 PM
2	Trails	6/22/2023 9:11 PM
3	Location on the Bruce Peninsula....day trip anywhere.	6/22/2023 7:18 PM
4	SBP doesn't need to focus on the natural attractions like beach/nature since tourism is already strong for those areas.....to enhance the draw, should focus on lower interest features like winter activities etc	6/21/2023 9:48 AM

Q8 QUESTION 4: How aware are you on what MATA can use the MAT revenues for?

Answered: 35 Skipped: 0



ANSWER CHOICES	RESPONSES	
Not Aware	22.86%	8
Somewhat Aware	54.29%	19
Very Aware	22.86%	8
TOTAL		35

Q9 Tourism Promotion - please elaborate

Answered: 23 Skipped: 12

#	RESPONSES	DATE
1	get a consultant who knows the Sauble Beach market, not a Toronto company who does not.	7/4/2023 12:20 PM
2	eliminate cartoony Wiarton Willie & establish a current brand that speaks to Gateway to Nature. Establish a winter celebration event, not a tacky Wiarton Willy. Willy is outdated; time to take it out of it's misery. Do a Free Willy event; tons of visitors will come!	7/4/2023 11:57 AM
3	casting a wide and data-informed net for promoting Sauble Beach events, businesses and beach facilities	7/3/2023 5:01 PM
4	promote SBP and what to do - tell people what they could do	7/3/2023 12:09 PM
5	Positive advertising.	6/25/2023 7:42 AM
6	just develop a promotion for october - we don't need to promote the summer	6/23/2023 8:04 AM
7	Billboard in GTA Digital marketing (Facebook, Instagram, etc) Booth at the Outdoor Show or Cottage Life Show in Toronto.	6/22/2023 11:40 PM
8	Online ans TV ads	6/22/2023 9:11 PM
9	Advertise in new markets	6/22/2023 7:18 PM
10	The main draw in the region is the Beach at Sauble. I think that by working with the local organizations that are already promoting tourism on behalf of their members, it is the tourists that ultimately benefit.	6/22/2023 4:57 PM
11	Partner with existing businesses for larger events.	6/22/2023 3:45 PM
12	Work on an all inclusive website where tourist can find all of their up to date information or work with existing websites to improve them and make sure they are up to date with the latest information.	6/22/2023 9:44 AM
13	Making sure we share the lifestyle we offer to people from the GTA and KW, and London. Those are the people looking to take weekends away in our area.	6/22/2023 9:34 AM
14	Radio adds , video adds to promote the area collaborate with businesses to promote Wiarton. le stop In. Front of a store take a pic with Willie in front of store... with a app share the picture... when you have completed the app or tour you can get a prize or Willie coin to collect...	6/21/2023 11:48 PM
15	Wiarthon needs a localized tourist page that talks about what makes each town unique, Sauble...same thing. Wiarton and Sauble are two very different places. I realize Bruce County is responsible for tourism, but we often get overlooked. (Especially Wiarton.)	6/21/2023 9:00 PM
16	Only off season activities that are unique	6/21/2023 7:37 PM
17	Winter/ fall/ spring promotion.	6/21/2023 6:48 PM
18	Offer to arrange photo and video shoots, as well as video production, of specific tourism businesses, that will be used: through paid and organic SBP tourism advertisements; shared for use with Explore the Bruce and RTO7 through their channels; and given to each specific business for their use and capitalizing on. Build 'itineraries' and 'tours' for visitors jumping business to business, through all seasons. By offering the service (rather than the money directly), MATA will be more in control and directly accountable for the output and outcomes.	6/21/2023 4:28 PM
19	Video ads that could be displayed on YouTube	6/21/2023 11:44 AM
20	Marketing in a wider market - perhaps social media ads specifically delivered out of province. A larger (a week long) yearly shoulder season/winter event	6/21/2023 9:48 AM
21	Focus on nature and award winning beach experience in advertising.	6/20/2023 8:29 PM

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22	Support the STRs that are being taxrd by MAT. Typical of SBP, we get absolutely no support from the Town.	6/20/2023 4:50 PM
23	marketing outside of region to promote the area	6/20/2023 4:40 PM

Q10 Development of Tourism Products/Experiences – Please elaborate

Answered: 22 Skipped: 13

#	RESPONSES	DATE
1	Research keystone events outside of core tourist season, whether they are events that took place in SBP in the past, or events that take place in other similar municipalities. Recruit local organizations and service clubs, and host planning/networking events around the theme of "what can you bring to {event name}"?	7/4/2023 4:11 PM
2	Purchase and maintain webcams in Sauble Beach. Develop a plan with out of market media days.	7/4/2023 12:20 PM
3	End seasonal trailer park camping. Establish overnight camping & yurts (max 1 week) to bring tourists in. Tourists spend the \$ not the locals who have enjoyed cheap waterfront trailer sites that need to be shared by all.	7/4/2023 11:57 AM
4	All the above endeavors - better staff make for better tourism experiences so it's a key feature! Grants for events	7/3/2023 5:01 PM
5	walking tours and history - hop on hop off bus marketing brochure with everything to do	7/3/2023 12:09 PM
6	one place for visitors to get all the information plus accomodation availability - expedia for this area	6/23/2023 8:04 AM
7	Tourism packages - encourage business to partner with the incentive of paid advertising coming from the MAT	6/22/2023 11:40 PM
8	Centralized events and venue open hours to share with guests	6/22/2023 9:11 PM
9	Support new activities/ events...	6/22/2023 7:18 PM
10	Tourism experiences are key. In Sauble we have always had the mindset that let's get them here & let's give them a reason to stay longer next time. Events, concerts, group tours etc.	6/22/2023 4:57 PM
11	Larger events.	6/22/2023 3:45 PM
12	There are many Tourism Products/Experiences already on the Peninsula that just need better exposure/advertising to the tourists. There are farmer's markets/car shows/canoeing/golf camps/live music that are already going on that people either forget about or don't know about. An up to date events calendar with big and small events would likely help.	6/22/2023 9:44 AM
13	Good clean washroom and change room facilities on the beach make such a huge difference to families visiting the area and the experience they share when they go home and discuss the day trip or weekend away at Sauble Beach.	6/22/2023 9:34 AM
14	Develop a repor with store owners down town create a hype for each store each week to get people interested in them	6/21/2023 11:48 PM
15	The town of Wiarton needs attractions. Educational attractions like museums and galleries. Plus, it must support existing attractions, not just on town property but all over the downtown. It must collaborate with local service groups.	6/21/2023 9:00 PM
16	Develop the wiarton willie festival.	6/21/2023 7:37 PM
17	Guided tours/rentals to support winter activities such as ice fishing, snow shoeing, cross country skiing	6/21/2023 6:48 PM
18	Pay for an expert to go on-site to identified and interested (i.e. they've signed up!) tourism operators who have a feasible product/experience to introduce, and allow the consultant to get the idea through the idea, planning and execution phase until live. Build a marketing campaign around it by offering dollars to directly support the launch and promotion of it. Work with the business on the marketing plan, but set parameters around proper use of marketing dollars.	6/21/2023 4:28 PM
19	Partner with tourism operators and local guides to fund expansion of local tourism experiences	6/21/2023 11:44 AM

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20	Supporting local businesses in developing year round market. Using funds to increase infrastructure to extend business - perhaps a grant towards upgrading insulation/heating/water sources in a business that was built for 3 season use? A grant for seasonal staff wages - to help between Nov and April months	6/21/2023 9:48 AM
21	Perhaps a stay and play type week or weekend where clients can golf or hike or enjoy the beach with accommodations and dining.	6/20/2023 8:29 PM
22	festivals and concerts -	6/20/2023 4:40 PM

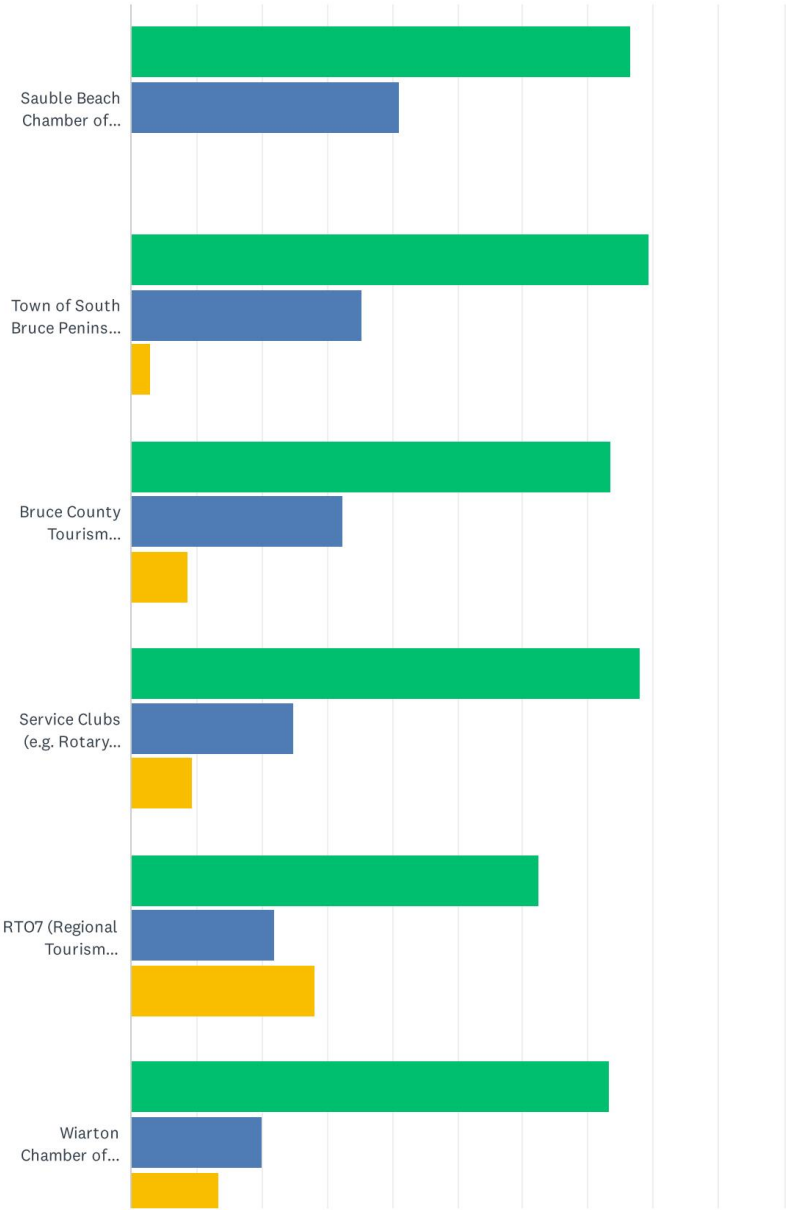
Q11 Other - please elaborate

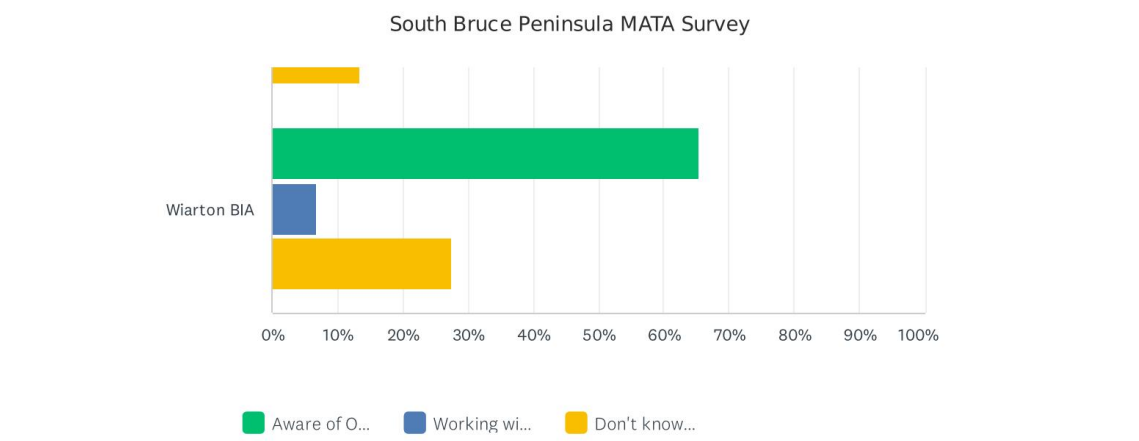
Answered: 8 Skipped: 27

#	RESPONSES	DATE
1	Marketing campaign targeted at SBP residents to encourage them to offer available space as short term rental for summer tourism staff, consider building/adapting current spaces to this purpose.	7/4/2023 4:11 PM
2	This survey does not really help the Sauble Beach businesses/tourism. Misses what is actually needed.	7/4/2023 12:20 PM
3	Better Blewater Park maintenance is necessary; go take a walk and see the lack of caring that visitors see. Establish a memorial bench protocol; Bluewater memorial benches are unsightly; this is a park, not a cemetary!	7/4/2023 11:57 AM
4	Funding is always tight for events, provide funding for events and the marketing to help draw people in.	6/22/2023 7:18 PM
5	Parking in Sauble and negative press over beach rights. Time to make up and go forward together. Sauble Beach was the top beach in Ontario not that many years ago. Need to fix issues and then promote them.	6/22/2023 3:45 PM
6	I believe it's better to have less tourists but offer the ones that do come a better experience while they are here. It was disappointing for many tourist to drive 3 hours to go to the grotto only to be turned away at the gate or go to Lion's Head to go hiking but the parking lot is full, or to pay for parking in Sauble Beach but all the spots are full. If they did find a spot to park after paying only to find the washrooms in disrepair.	6/22/2023 9:44 AM
7	Work to develop mountain bike rental business that could operate in summer.	6/21/2023 11:44 AM
8	We rent to clients in Sauble and the beach is the main draw for our clients. This resource needs to be protected and cared for. A comprehensive advertising campaign should be launched to inform the public of the current land issues and let Ontario know that "the beach is open!"	6/20/2023 8:29 PM

Q12 QUESTION 6: From the following list of tourism industry supporting organizations, please indicate by checking the appropriate box which organizations you are aware of, and which you are working with.

Answered: 35 Skipped: 0





	AWARE OF ORGANIZATION(S)	WORKING WITH ORGANIZATION(S)	DON'T KNOW OR N/A	TOTAL RESPONDENTS
Sauble Beach Chamber of Commerce	76.47% 26	41.18% 14	0.00% 0	34
Town of South Bruce Peninsula	79.41% 27	35.29% 12	2.94% 1	34
Bruce County Tourism (Explore the Bruce)	73.53% 25	32.35% 11	8.82% 3	34
Service Clubs (e.g. Rotary, Optimist, Lion's Club, etc.)	78.13% 25	25.00% 8	9.38% 3	32
RTO7 (Regional Tourism Organization 7, BruceGreySimcoe)	62.50% 20	21.88% 7	28.13% 9	32
Warton Chamber of Commerce	73.33% 22	20.00% 6	13.33% 4	30
Warton BIA	65.52% 19	6.90% 2	27.59% 8	29

#	OTHER (PLEASE SPECIFY)	DATE
1	Tourist town,	6/22/2023 7:18 PM
2	Ontario Private Campground Association - Advertising and promoting our Campground	6/22/2023 9:44 AM

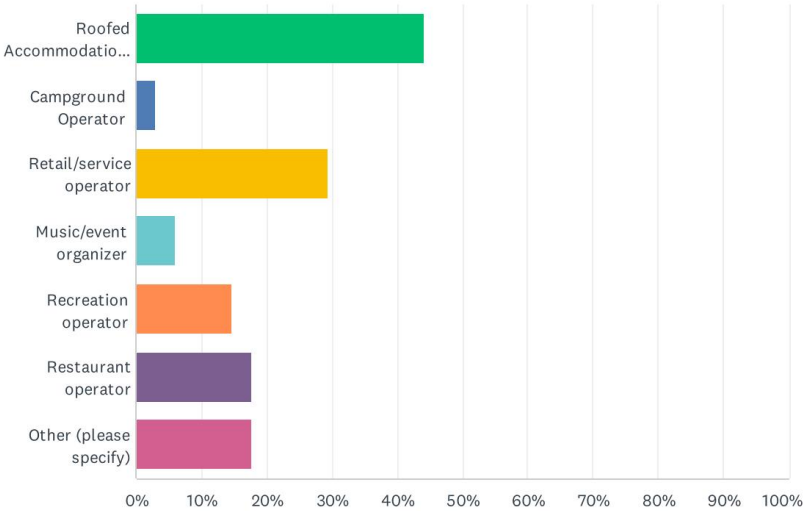
Q13 QUESTION 7: How could MATA partner with these groups to sustainably grow tourism in South Bruce Peninsula?

Answered: 20 Skipped: 15

#	RESPONSES	DATE
1	Offer free marketing for service clubs' fundraising events (raffles, fundraiser dinners, etc.) in exchange for a guarantee of event offerings through the year (Maple Magic, Wiarton Willie fest, etc.).	7/4/2023 4:11 PM
2	MATA could partner by first getting RT07 to recognize Sauble Beach area as tourism, not just Collingwood and Explore the Bruce mainly supports Bruce Power with minimal effort for the peninsula.	7/4/2023 12:20 PM
3	FIO	7/4/2023 11:57 AM
4	Sauble Beach Chamber of Commerce puts on excellent events but could use some support promoting and coordinating these events, they're a huge value add for tourism, subsidizing them would be awesome.	7/3/2023 5:01 PM
5	do not overlap services, support they with 'seed money' to help with staff incentives, staying open longer in the season.	7/3/2023 12:09 PM
6	Make Sauble Beach Chamber of Commerce work with the community not just the board of directors. We quit working with Sauble Beach Chamber of Commerce because only the board members were getting activities and events that only made them money, not the members	6/24/2023 1:38 PM
7	do not have alot of red tape, monies need to go back into tourism directy not administration	6/23/2023 8:04 AM
8	Create an app	6/22/2023 9:11 PM
9	Through supporting the activities of each....	6/22/2023 7:18 PM
10	I think MATA can partner with the organizations to expand the tourism experiences. The more we can give them to do, see, participate in... the longer they will stay. The longer they stay, the more they spend in local businesses & the longer they stay, the more MAT is generated for future use. Win-Win	6/22/2023 4:57 PM
11	Share risk for new ideals for larger events.	6/22/2023 3:45 PM
12	I would like to see partnering with RTO7 and Bruce County Tourism to do a better job of reaching a larger audience with more offerings. It would be good to see Wiarton & Sauble Chamber websites merge their efforts into the larger Bruce County Website. As stated before it's better to do a great job on 1 website than a ok job on 5 little websites.	6/22/2023 9:44 AM
13	Help give them the workers and resources to thrive. Volunteer burn-out is a huge, huge issue.	6/21/2023 9:00 PM
14	Again, fund only unique off season events	6/21/2023 7:37 PM
15	Create promote winter/fall/spring activities and events to draw tourism	6/21/2023 6:48 PM
16	Chamber of commerce could use additional funding for organized events that draw in tourists each year.	6/21/2023 4:28 PM
17	Build an advisory group with all partners to meet (ex.) every two months, assign goals and action plans to work together. Nearby example: Sustainable Tourism Advisory Group - focused in Northern Bruce Peninsula.	6/21/2023 4:28 PM
18	Use info gathered through MATA to better communicate with local accommotions businesses.	6/21/2023 11:44 AM
19	Advertise we are open for business.	6/20/2023 8:29 PM
20	How about it gets expanded to include STR owners??	6/20/2023 4:50 PM

Q14 QUESTION 8:To help us further understand the survey responses received, how would you classify your role within the tourism industry in South Bruce Peninsula. Check all that apply.

Answered: 34 Skipped: 1



ANSWER CHOICES		RESPONSES	
Roofed Accommodation Operator (Motel, Hotel, B&B, Cottage)		44.12%	15
Campground Operator		2.94%	1
Retail/service operator		29.41%	10
Music/event organizer		5.88%	2
Recreation operator		14.71%	5
Restaurant operator		17.65%	6
Other (please specify)		17.65%	6
Total Respondents: 34			

#	OTHER (PLEASE SPECIFY)	DATE
1	nature experience	7/4/2023 11:57 AM
2	Sauble Beach Chamber of Commerce and Realtor (we like visitors because they fall in love with the area and then move here)	6/22/2023 4:57 PM
3	volunteer art gallery curator	6/21/2023 9:00 PM
4	Destination Marketing Organization for the region	6/21/2023 4:28 PM

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5	Bruce County Ec Dev team member	6/21/2023 11:44 AM
6	Airbnb, 4 person/family max independant sole partnershipx	6/20/2023 4:50 PM

Q15 QUESTION 9: Please provide any additional feedback on priorities or actions for the MATA for South Bruce Peninsula.

Answered: 12 Skipped: 23

#	RESPONSES	DATE
1	I wish you the best of luck! This is not an easy knot to untangle.	7/4/2023 4:11 PM
2	Having the information gathering during the Victoria Day and Canada Day weekends is a beyond terrible decision by the consulting company.	7/4/2023 12:20 PM
3	Staffing and accommodations is an issue. Parking rates are a little high. Weekly events would be a bonus. All in all, Sauble's awesome so really just maintain what we have and it will continue to thrive.	6/22/2023 11:40 PM
4	MATA should focus on supporting the happenings that have history in the communities.....show support through funding for new ideas to build shoulder season...and identify new markets to advertise.	6/22/2023 7:18 PM
5	I believe that there is plenty of MAT to go around, but I also believe that it is extremely important that there be a way that MAT money be weighed for the areas that are generating the bulk of the MAT. The visitors generating as well as the businesses collecting the MAT should see the benefits of the MAT.	6/22/2023 4:57 PM
6	Send out a form by September every year to facilitate Mat tax similar to HST form sent by the government.	6/22/2023 2:21 PM
7	Make sure the Town of SB Peninsula does not off load their current tourist expenses onto the MATA organization. As an example their tourist information center or staffing. They benefit from tourism more than the contributors to the MAT. Thank you for your efforts. Best of luck to MATA.	6/22/2023 9:44 AM
8	See what stores have to offer In town that could promote how great the stores are ...	6/21/2023 11:48 PM
9	This organization has been tainted by your connection initially to the former mayor. I would support a new MATA being founded if the former mayor continues to wield influence in this organization.	6/21/2023 7:37 PM
10	Bruce peninsula is known as a summer destination. We need to promote increase draw for the other seasons.	6/21/2023 6:48 PM
11	N/A	6/21/2023 11:44 AM
12	More clarity on beach land settlement. Share information with Ontarians so that they know Sauble Beach is open for business.	6/20/2023 8:29 PM