



**THE REGIONAL MUNICIPALITY OF NIAGARA  
PLANNING & ECONOMIC DEVELOPMENT COMMITTEE  
FINAL AGENDA**

**PEDC 7-2019**

**Wednesday, July 10, 2019**

**1:00 p.m.**

**Council Chamber**

**Niagara Region Headquarters, Campbell West**

**1815 Sir Isaac Brock Way, Thorold, ON**

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<b>2. <u>DISCLOSURES OF PECUNIARY INTEREST</u></b>	
<b>3. <u>PRESENTATIONS</u></b>	
3.1 <u>Tourism Partnership of Niagara</u> Anthony Annunziata, President, Tourism Partnership of Niagara	3 - 58
3.2 <u>Brock University Centre for Sport Capacity Report on Sport Tourism</u> (Agenda Item 6.1) Dr. Julie Stevens, Associate Professor, Department of Sport Management and Director, Centre for Sport Capacity, Brock University	59 - 71
<b>4. <u>DELEGATIONS</u></b>	
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**7. OTHER BUSINESS**

**8. CLOSED SESSION**

**9. NEXT MEETING**

The next meeting will be held on Wednesday, August 7 at 1:00 p.m. in the Council Chamber, Regional Headquarters.

**10. ADJOURNMENT**

If you require any accommodations for a disability in order to attend or participate in meetings or events, please contact the Accessibility Advisory Coordinator at 905-980-6000 (office), 289-929-8376 (cellphone) or [accessibility@niagararegion.ca](mailto:accessibility@niagararegion.ca) (email).

A wide-angle photograph of Niagara Falls at sunset. The water is cascading over the edge, creating a misty spray at the base. The sky is a warm, golden-orange color, and the water reflects the light. The overall mood is serene and majestic.

# Tourism Partnership of Niagara

# Background

In 2010, the Ministry of Tourism, Culture and Sport supported the establishment of 13 tourism regions to further advance the competitiveness of Ontario's tourism sector. This was a key recommendation from the 2009 Tourism Competitiveness Study.

Each region is led by a Regional Tourism Organization (RTO) that provides leadership, strategic coordination and delivery of tourism activities at a regional level. RTOs are in place to enhance the economic impact of the tourism sector by leveraging partnerships and collaboration across industry.

Regional Tourism Organizations are to adhere to the program parameters as outlined in the Transfer Payment Agreement (TPA).



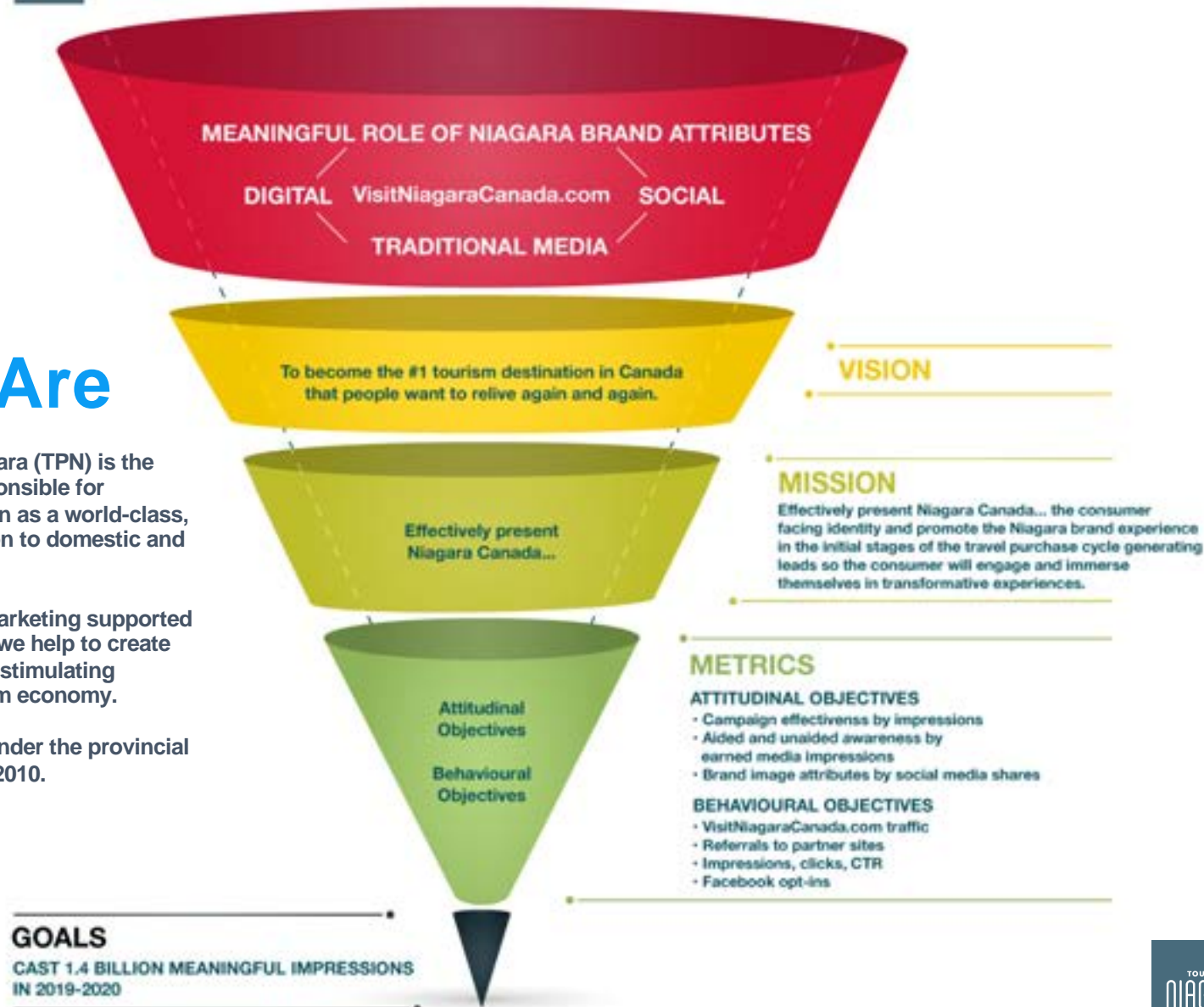


# Who We Are

Tourism Partnership of Niagara (TPN) is the marketing organization responsible for marketing the Niagara Region as a world-class, four-season travel destination to domestic and international markets.

Through effective tourism marketing supported by aligned market research, we help to create jobs and generate wealth by stimulating demand for Niagara's tourism economy.

The TPN was incorporated under the provincial Corporations Act on Oct. 4, 2010.



# TPN Board of Directors

The TPN Board consists of senior level representatives with the necessary authority to make decisions on behalf of their organization as it relates to the work of the TPN from the following organizations.

# TPN Board Committees

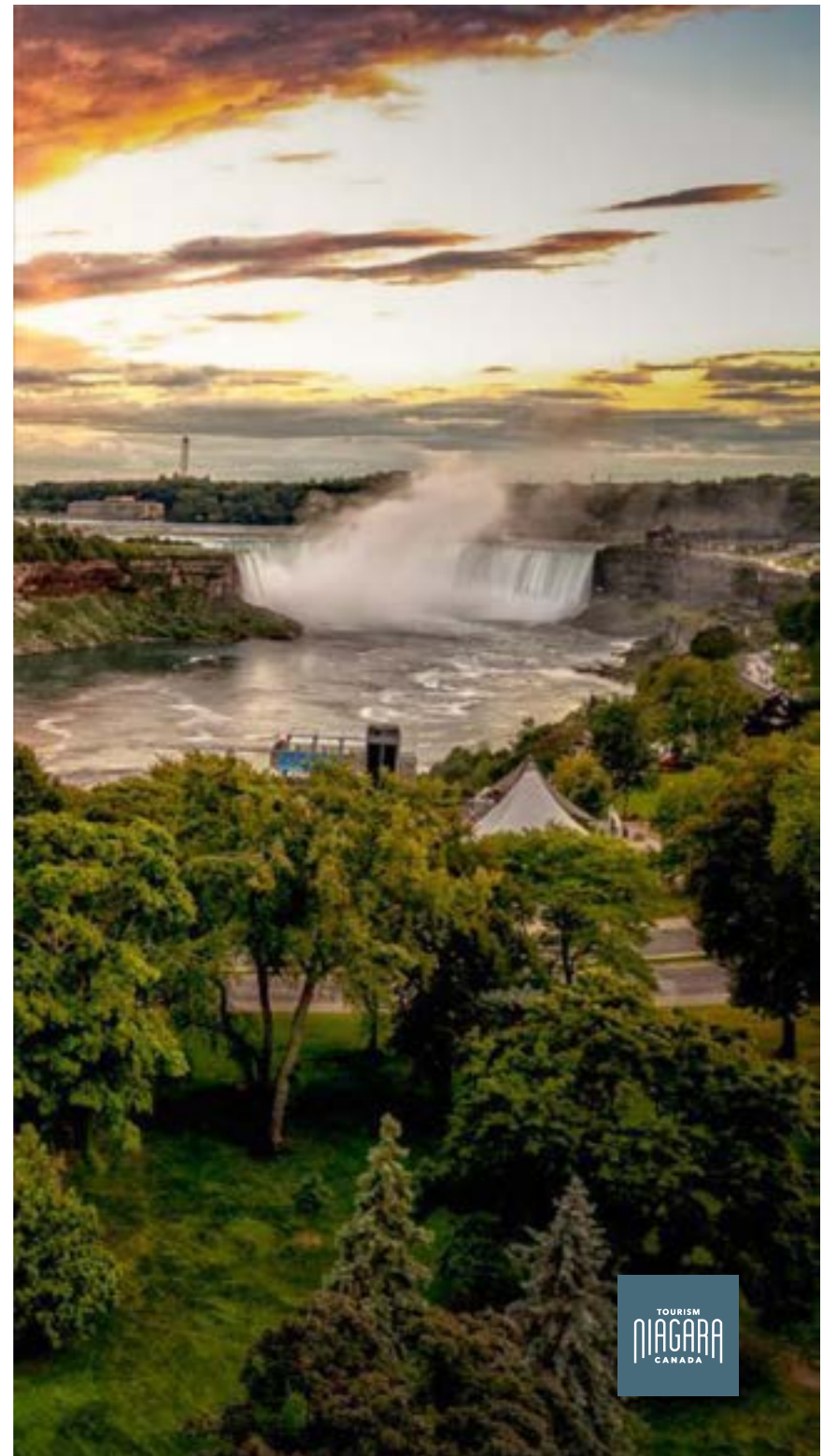
TPN Board members provide input through participation in three committees:

- Executive Committee
- Finance and Audit Committee
- Sub-Regional Partners Committee

# Financial Obligations

A Transfer Payment Agreement (TPA) between the Ministry of Tourism, Culture and Sport and the TPN governs the operations.

Annually, the TPN management, in consultation with stakeholders, creates a business plan that fulfill a broad range of activities, which are approved by the Ministry with terms and conditions outlined in the TPA.





# Role of the TPN

Increase awareness of Niagara Region and influencing consumers at the intent and consideration phase of the consumer path to purchase.

Playing a leadership role in the Niagara Tourism and Hospitality apparatus that helps shape the Niagara narrative to attract business and leisure consumers to Niagara.

The “My Niagara” narrative consists of communicating shareable experiences, creating a sense of emotional connectivity with friends, family and loved ones by communicating genuine and authentic experiences that the Niagara region has to offer.

All of this delivered by a cast of professionals, businesses, craftsman, artisans and entrepreneurs who execute the experiences delivered in this great Narrative.

The cast of characters continue to grow and add to the vibrancy and charm of what we call “OUR NIAGARA”.

**Think:** Niagara would be an excellent travel destination.

**Feel:** Inspired and compelled to discover the unfamiliar in Niagara.

**Do:** Research everything Niagara has to offer.

## “The World Needs More Niagara Campaign”

The world needs more Niagara...they just don't all know it yet. Let's educate and emotionally connect with consumers and let them know a trip to Niagara isn't just something they'll want, it's the getaway they need.



# Targeting and Path to Purchase

The middle stages of the consumer path to purchase funnel will be the main focus of TPN's campaigns and content creation which will work to bolster intentions and increase consideration for the Niagara Region.

Travellers from around the world will have some awareness of the Niagara Region but have limited knowledge of the experiences that the region has to offer.

TPN needs to first inspire travellers with a compelling vision of the Niagara Region and then provide the necessary information to plan their visit.

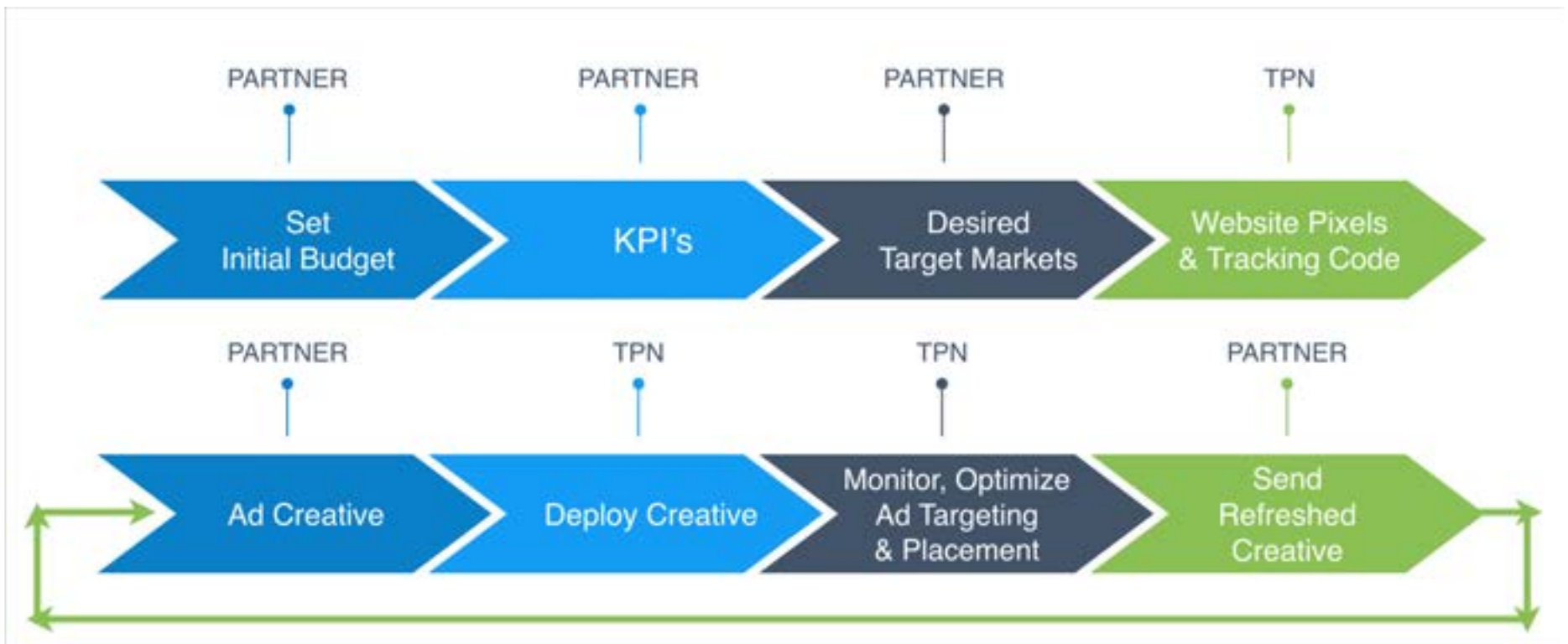
We look at the Niagara product offering and where it resides in the path to purchase funnel, our overall market message and highlighted regional experiences.





# Marketing Execution Flow

## Example Campaign Objective: Drive Awareness



Consumer mindset in this stage: Consumer has made the decision to travel and now needs to figure out the details - searching for hotels/flights, exploring activities, events, etc.

Creative job to be done: Provide the information a consumer would need to plan a trip to Niagara.

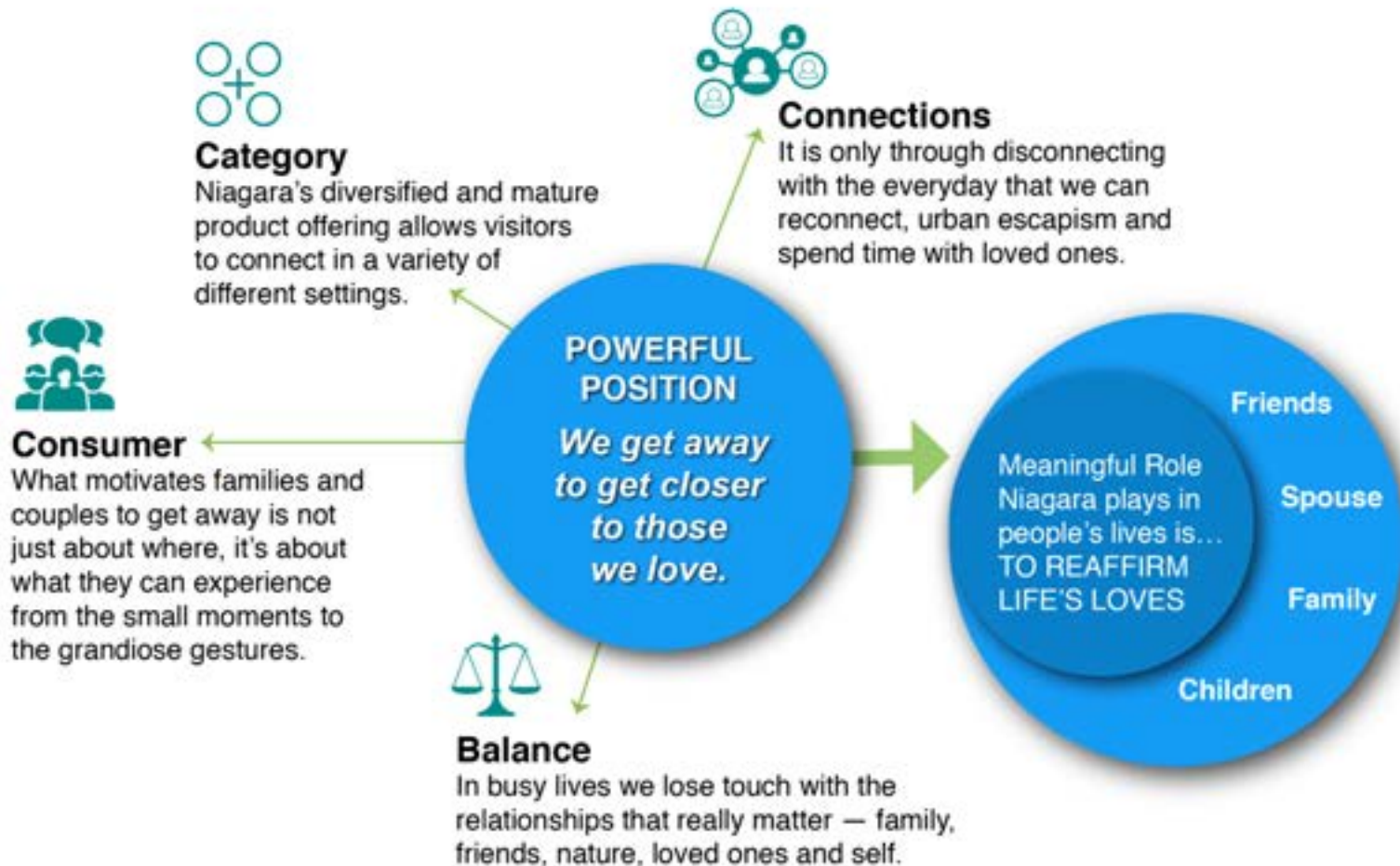
Messaging: Focus on specific Niagara experiences or events of interest (e.g. Icewine Festival or farm-to-table dining with notable chef).

Call to action: Encourage consumers to learn more about Niagara has to offer.

# Niagara Brand Positioning

## Message, Tonality and Sentiment

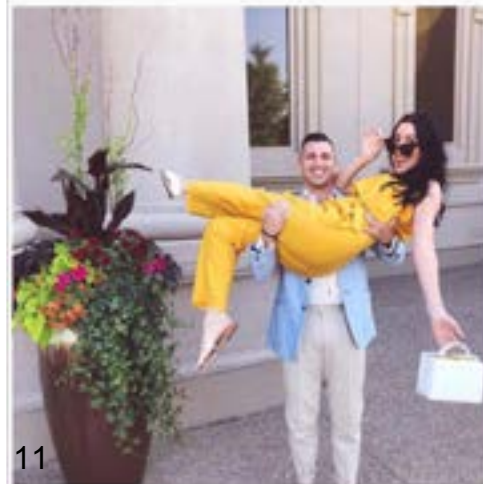
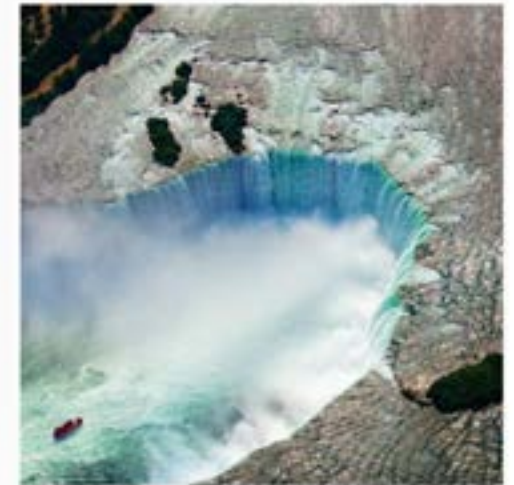
Our place within the 'consumer path to purchase' funnel



# The World Needs More Niagara

Right now, more than ever, “The world needs more Niagara”. Let’s speak to the fact that a trip to Niagara, is a break from the pressure of daily life and an escape from the city to nature where travellers can focus on loved ones and what matters to them most.

Let’s grab consumers attention by creating custom eye-catching cinemographs for ad banners that feature scenes from Niagara. Imagery might include; wine is circling in a glass and the cinemograph reads, “You’re going to need a bigger glass. The world needs more Niagara.” A woman relaxes in bubble bath overlooking the Falls while listening to headphones, “You’re going to need a longer playlist. The world needs more Niagara.” Taking a Helicopter ride above Niagara Falls, and the amazing experience. The creative emphasizes what more Niagara in one’s life actually means.





# The World Needs More Niagara

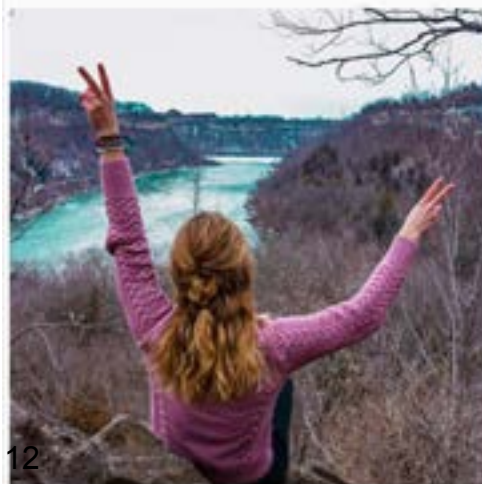
Launch footprint will encompass 8-hour drive radius, layering in performance results to identify areas with greater message resonance.

Through diligent campaign maintenance & optimization, TPN will look to identify whether particular consumer sets are more engaged and potentially redistribute resources in specific areas to reflect a more focused deployment strategy and ensure efficiency of investment.

Extend the life and coverage of earned media by utilizing paid, native channels to make content more discoverable.

By placing links to earned news stories on premium publication sites, enabling a wider online audience to be able to access earned coverage as they consume content on a variety of websites.

Amplifying content while tying in paid media channels to enhance mass awareness.







# Visit Niagara

With amazing dining and wineries, vibrant cultural centres, and a wide range of outdoor activities, it's no surprise that the Niagara region has become a Canadian tourism gem. A destination for honeymooners, celebrities, history buffs, adventurers, athletes, foodies, families and everyone in between. Niagara is a jewel unlike any other with its diverse landscapes and world-class attractions.



**750+** RESTAURANTS



**320+** ATTRACTIONS



**20+** BEACHES



**140+** WINERIES  
& CRAFT BREWERIES



# Visit Niagara

Renowned for the iconic Niagara Falls, Niagara is home to an abundance of breathtaking natural scenery—enough for Winston Churchill to state that the Niagara Parkway was “the most beautiful Sunday drive in the world.” The region’s diverse geography offers extensive hiking trails—including an extension of the Bruce Trail—to smaller cascades and powerful rapids, plus an assortment of exciting outdoor activities such as ice skating, rowing, vineyard cycling tours, yoga by the Falls and much more.

Given its breathtaking natural beauty and exquisite, relaxing and romantic attractions, it comes as no surprise that Niagara Falls has earned its reputation as the “Honeymoon Capital of the World.” Rolling vineyards, natural wonders, exquisite accommodations and dynamic sunset views are just a few of the many attractions that make Niagara a sought-after location for couples to visit.





# Visit Niagara

With over 140 wineries and breweries and over 750 full-service restaurants, Niagara is recognized as an award-winning, world-class culinary mecca for chefs, vintners, sommeliers, brewers, oenophiles and foodies alike. One of the top culinary destinations in Canada, Niagara is passionate about using locally-sourced ingredients to create delectable food and wine. Whatever your taste, this is the countryside where good things grow.

The Niagara Region abounds in monuments, museums, former battlefields, forts and heritage structures due to its riveting history and rich heritage. Playing a pivotal role in the War of 1812, history buffs can take themselves back in time through tours and annual military re-enactments at Fort Erie and Fort George and by visiting Chippawa Battlefield Park and Lundy's Lane Battlefield.

With over 162 annual festivals and events and countless historic sites, cultural museums and arts centres—the arts, entertainment and historic significance of the Niagara region is unsurpassed. From West Lincoln to Niagara Falls, there's much to see and experience throughout Niagara, including live theatre, movies, orchestras, visual arts and more.



# TOTAL VISITORS (2017) 12.95 MILLION!

ONTARIO IS THE LARGEST MARKET FOR TOURISTS TO NIAGARA (8.4 MILLION VISITORS ANNUALLY), FOLLOWED BY THE UNITED STATES (3.2 MILLION), OVERSEAS (1.1 MILLION), AND THEN THE REST OF CANADA (292 THOUSAND).

TOTAL OVERNIGHT VISITORS (2017)  
**4.9M**



TOTAL SAME DAY VISITORS (2017)  
**8.0M**



TOTAL TOURISM EXPENDITURES OF SAME DAY VISITORS (2017)

**\$686.4 MILLION**

- VS -

TOTAL TOURISM EXPENDITURES OF OVERNIGHT VISITORS (2017)

**\$1.7 BILLION**



TOTAL TOURISM EXPENDITURES (2017)

**\$2.4 BILLION**

VISITORS FROM THE UNITED STATES SPEND THE MOST ON AVERAGE THAN OTHER GEOGRAPHIC MARKETS.



TOTAL TOURISM BUSINESSES (2018)

**2,824**

TOTAL TOURISM JOBS (2018)

**39,995**



NIAGARA HAS 1.8 TIMES THE CONCENTRATION OF TOURISM JOBS THAN ONTARIO.



TOURISM JOB GROWTH (2011 -2018)

**6,059** OR **17.9%**

TOURISM JOBS ARE INCREASING AT A FASTER RATE THAN TOTAL JOBS IN NIAGARA. FROM 2011 TO 2018, TOURISM JOBS INCREASED BY 17.9% WHILE TOTAL JOBS INCREASE BY 14.1%. **IT'S A GROWING SECTOR.**

Statistics provided by Niagara Region





# US Tourism Arrivals into Canada

- The Niagara region has four border crossings into the United States: the Lewiston-Queenston Bridge, Rainbow Bridge, Peace Bridge and Whirlpool Bridge (Nexus only)
- The four Niagara border crossings are the busiest borders in Ontario—and Canada—with over 11.6 million counted arrivals\*

\* Bridge and Tunnel Operators Association (BTOA) 2018



**Automobile Arrivals**  
**11.6 + Million**



	YTD 2018	
	Arrivals	% YOY Variance
Automobile	8,183,103	2.4
Air	4,591,876	-3.1
Other	1,665,374	10.1
US Total	14,440,353	1.4

\*Other: bus, train, and cruise arrivals

Source: Statistics Canada

**Total US Auto Arrivals to Canada**

**+2.4% ▲ YOY**



# Food & Wine

With over 140 wineries and breweries and over 700 full-service restaurants, Niagara is recognized as an award-winning, world-class culinary mecca for chefs, vintners, sommeliers, brewers, oenophiles and foodies alike.

Niagara's unique climate and growing conditions yield a plentiful bounty of cool-climate grapes, robust grains and a cornucopia of locally-sourced produce—most notably, the sweet and juicy Niagara peach—which inspire a shared philosophy throughout the region that the most exceptional dishes can be found from ingredients in your own backyard. The diverse geography of the Niagara Escarpment and vinelands yield a unique terroir from which the most delicious produce and grapes are grown. Whatever your taste, this is the countryside where good things grow.

Taste for yourself what makes Niagara one of the most acclaimed grape-growing and winemaking regions in Ontario. With a wide array of one-of-a-kind, intimate experiences, sip and savour during tours and tastings, offered at every vineyard from small, independent wineries like Twenty Valley's Foreign Affair, Hidden Bench and Tawse to iconic estates such as Cave Spring Cellars, Inniskillin, Pellar Estates or the Wayne Gretzky Winery.





# Food & Wine

With a burgeoning craft beer culture quickly spreading across the region, Niagara is also home to an abundance of boutique-like local breweries and distilleries that lean into the “micro movement.” Small-batch beers, ciders and spirits, each typically hand-made with locally-sourced ingredients can be found along the Niagara Ale Trail, a handy guide to the region’s 13 top breweries, including the award-winning Niagara Oast House Brewers, Silversmith Brewing Company, Bench Brewing Company and more.

Recently designated as the most romantic dining destinations by OpenTable’s 100 Most Romantic Restaurants in Canada list for 2019 with 11 restaurants awarded (more than any other destination in Canada), Niagara is the place to be for gastronomic indulgence. Niagara-on-the-Lake, in particular, is renowned for its culinary excellence, named Canada’s number one food and wine destination by TripAdvisor.

There are also several culinary and wine festivals throughout the year, from Niagara’s Icewine Harvest Festival and Days of Wine and Chocolate in the winter, to the Niagara Food Festival in the summer, presented by Niagara College, where visitors can find fantastic food from local restaurants and food producers, cooking demonstrations with celebrity chefs and much more.





# Food & Wine

## KEY HIGHLIGHTS

### Two Sisters Vineyard

Created by the Marotta sisters with one inspired vision, Two Sisters Vineyard produces ultra-premium red wines from the unique terroir of the region with viticultural practices that remind guests to savour life's little moments. Beautiful and timeless, the estate produces both award-winning wines and award-winning dishes at Kitchen76, where authentic Italian cuisine awaits. [www.twosistersvineyards.com](http://www.twosistersvineyards.com)

### The Restaurant at Pearl Morrisette

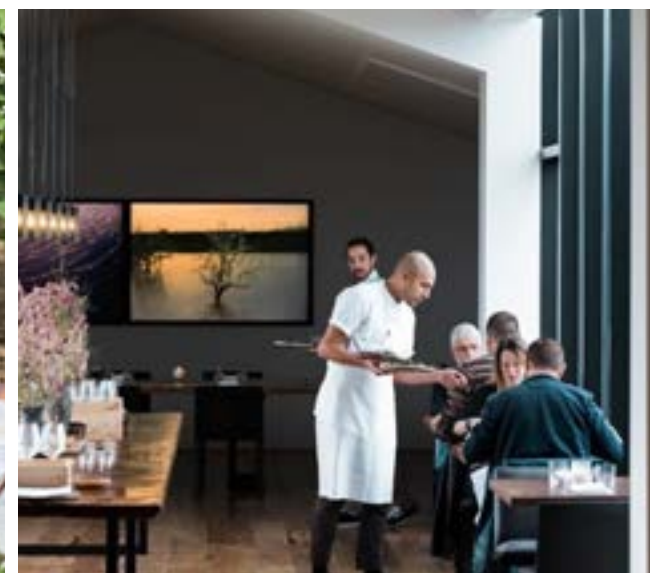
With an ever-changing multi-course menu featuring the best regional ingredients inspired by seasonal French cooking, The Restaurant at Pearl Morrisette is a mouth-watering destination. Named number one on Canada's Best New Restaurants for 2019, the Jordan Station restaurant offers set menus for a curated experience from start to finish. [www.pearlmorrisette.com/therestaurant](http://www.pearlmorrisette.com/therestaurant)

### Honsberger Estate Winery

A family fun farm since 1811, Honsberger Estate is home to a delectable, award-winning rosé; the Oven Bistro, where divine oven-roasted pizzas await; the Small Barn Restaurant; and several animals, including horses, goats, sheep and several rescue dogs. [www.honsbergerestate.com](http://www.honsbergerestate.com)

### Trius Winery

Crafting fine VQA wines from premium grapes for over 30 years, Trius Winery is a Niagara winemaking pioneer. Here, wines and menus are inspired by the seasonal evolution of the vines and the local produce that grows beside them. Visitors can taste, tour and learn the art of blending their very own Trius Red. [www.triushines.com](http://www.triushines.com)





# Outdoors, Sports & Nature

While the world-renowned Niagara Falls will leave you breathless, there is much more natural beauty to be found in Niagara than the iconic cascade. Winston Churchill once called the Niagara Parkway “the prettiest Sunday drive in the world,” while admiring the intense natural beauty to be found across the Niagara region.

Since 1885, Niagara Parks has preserved and protected the land surrounding Niagara Falls and the Niagara River. Visitors can explore and interpret the 56-kilometre Niagara River Recreational Trail through sprawling parklands, natural attractions, local-sourced culinary offerings, celebrated golf courses, manicured gardens and restored heritage sites. Through Niagara Parks, you can zipline 670 metres into the mist towards the Canadian Horseshoe Falls, take a walk past the Niagara River’s Class 6 white water rapids, take a journey behind the falls, immerse yourself in nature at the Butterfly Conservatory, sink a ball at any of five unique and celebrated golf courses, and much more.





# Outdoors, Sports & Nature

With a plethora of conservation areas, hiking trails, waterfalls, rocky cliffs and, of course, the stunning vineyards across the region, Niagara is home to a natural geographic diversity that is rarely found in southern Canada. Maintaining a section of the Bruce Trail, the Niagara Region offers exceptional hiking trails with 85+ kilometres of footpaths through six different nature areas, some of which are home to the rarest plants and animals in the country.

From scuba diving in Lake Erie, rowing in St. Catharines and swimming at Crystal Beach, to ice skating at Wayne Gretzky Estates winery, vineyard cycling tours, yoga by the falls, watching a race at Merrittville Speedway or cheering on the Niagara Ice Dogs hockey team, there are numerous sports and activities to take part in within the Niagara Region—no matter the season.





# Outdoors, Sports & Nature

## KEY HIGHLIGHTS

### White Water Walk

Take in North America's largest series of standing waves from an impressive quarter-mile boardwalk along the shoreline in the Niagara Gorge. The self-guided tour offers a glimpse into the geologic history and local flora and fauna in the Gorge, while giving an up-close and personal view of the intense Whirlpool Rapids travelling at 48 kilometres per hour!

<https://www.niagaraparks.com/visit/attractions/white-water-walk>

### Ball's Falls

Photographers and nature lovers alike will love the incredibly breathtaking view of the majestic Twenty Mile Creek as it plummets over both the upper and lower cascades of Ball's Falls. The Ball's Falls Centre for Conservation offers interactive exhibits and displays focusing on nature, conservation, the Niagara Escarpment, the watershed and the area's history, through the lens of the mid-19th century industrial hamlet where the original Ball family lived.

<https://npca.ca/parks/balls-falls>

### Whirlpool Jet Boat Tours

Niagara's Devil's Hole Rapids are home to class 5 rapids, meaning adventurous visitors are in for a wild jet boat ride through waves up to 6 metres high, where currents rush up to 32 kilometres per hour past the awe-inspiring scenery of the Niagara Gorge! Get ready to get soaked and stoked on one of the most refreshing and memorable Niagara experiences.

<https://www.whirlpooljet.com>





# Romance

The region of Niagara has long been recognized as a popular destination for romantic getaways. Rolling vineyards, natural wonders, exquisite accommodations and dynamic sunset views are just a few of the many attractions that make Niagara a sought-after location for couples to visit.

Whether you choose to exchange your vows overlooking Niagara Falls, in the surroundings of Niagara-on-the-Lake at the gazebo in Queen's Royal Park, or at one of the numerous wineries, the ceremony will be an unforgettable experience complete with charm and elegance. Niagara Parks offers reception and venue space to host any wedding size from intimate parties of 20 guests all the way up to elaborate gatherings of 600.



# Romance

With its breathtaking natural beauty and exquisite, relaxing and romantic attractions, it comes as no surprise that Niagara Falls has earned its reputation as the “Honeymoon Capital of the World.” More than 50,000 honeymooners choose to visit the City of Niagara Falls per year and Niagara Falls Tourism has presented more than one million honeymoon certificates signed by the mayor to newlyweds. Couples celebrating their anniversary in Niagara Falls are also eligible to receive an Anniversary Certificate.

For the second year in a row, the Niagara Region has been recognized for its romantic dining experiences with 11 restaurants featured on OpenTable’s 100 Most Romantic Restaurants in Canada for 2019—more than any other region in the country. Among the list are AG at the Sterling Inn, Cannery Restaurant, The Drawing Room at The Prince of Wales Hotel, Inn on the Twenty, Kitchen76 at Two Sisters Vineyards, The Restaurant at Peninsula Ridge, and Trius Winery Restaurant; each offer a unique destination for the ultimate date night.





# Romance

## KEY HIGHLIGHTS

### Niagara Helicopter Rides

Take a private helicopter tour and experience the natural beauty that Niagara has to offer through panoramic views while soaring 2,500 feet in the air. Niagara Helicopters Limited even gives you the option to say “I do” directly over the awe-inspiring waterfalls at its “Chapel in the Sky.” With more than 50 years of service, Niagara Helicopters Limited will be sure to make this thrilling experience one to remember.

[www.niagarahelicopters.com](http://www.niagarahelicopters.com)

### Vintage Hotels – Queens Landing/Prince of Wales

Romantic accommodations are plentiful with Vintage Hotels offering a collection of Ontario’s Finest Hotels throughout the Niagara region. Relish the historic Victorian décor at Prince of Wales Hotel or book a stay in a room at Queen’s Landing, a Georgian-style mansion with a breathtaking waterfront setting. In addition, there are many world-class Bed & Breakfasts nestled throughout the region offering an intimate stay for those looking for a romantic hideaway.

[www.vintage-hotels.com](http://www.vintage-hotels.com)

### Niagara Skywheel

Take your romance to the next level with a graceful scenic journey that delivers magnificent views of both the Horseshoe and American Falls. Clifton Hill’s magical Niagara Skywheel is Canada’s largest observation wheel, towering at 175 feet over the Niagara Falls horizon. With dazzling views of the glittering lights, powerful falls and surrounding skyline, a kiss at the Niagara Skywheel is the icing on the cake for a perfect date night in one of the most romantic destinations in Canada.

[www.cliftonhill.com](http://www.cliftonhill.com)





# Arts, History & Entertainment

With over 162 annual festivals and events and countless historic sites, cultural museums and arts centres, the arts, entertainment and historic significance of the Niagara region is unsurpassed. From West Lincoln to Niagara Falls, there's much to see and experience throughout Niagara, including live theatre, movies, orchestras, visual arts and more.

No matter the season, there's always something to see when visiting Niagara—view artists' paintings at the Niagara Pumphouse Arts Centre; see live entertainment and film screenings at the Seneca Theatre or Greg Frewin Theatre; or check out the FirstOntario Performing Arts Centre, featuring live music, theatre productions, movie and documentary screenings and more.

The Niagara Investment in Culture program promotes culture throughout the region by providing funding of innovative and collaborative projects. Visitors and locals alike have benefitted from the program, with events such as Jazz Festivals, theatrical productions, historic celebrations, movies in the park, public mural art projects, multi-cultural days, young musician competitions, fine arts festivals, pop-up exhibits and street performer programs circulating throughout Niagara as a direct result.





# Arts, History & Entertainment

With a riveting history and rich heritage, the Niagara Region abounds in monuments, museums, former battlefields, forts and heritage structures. Playing a pivotal role in the War of 1812, history buffs can take themselves back in time through tours and annual military re-enactments at Fort Erie and Fort George and by visiting Chippawa Battlefield Park and Lundy's Lane Battlefield, where some of the longest and bloodiest battles took place.

With several annual festivals, there is much to celebrate across the region, from the Niagara Folk Arts Festival and the Niagara integrated film festival, to Canal Days Marine Heritage Festival and even Niagara Falls Comic Con. There's something for everyone!

Looking for nightlife? Select vineyards and restaurants have exciting late-night programming including live music, DJs and special events, not to mention the vibrant after-dark entertainment in Niagara Falls—from wine bars and clubs, to slots and tables at Fallsview and Casino Niagara, there's plenty of action to be found.





# Arts, History & Entertainment

## KEY HIGHLIGHTS

### Shaw Festival Theatre

Offering world-class theatre in one of the most beautiful regions in Canada, the Shaw Festival produces 11 plays across three stages annually, with several events and activities to keep theatre aficionados entertained throughout the year. Inspired by the wit, passion and spirit of Bernard Shaw, the Shaw Festival has created unforgettable theatrical encounters for almost 60 years and has grown to become a major Canadian cultural icon. [www.shawfest.com](http://www.shawfest.com)

### Fort George National Historic Site

The headquarters of the Centre Division of the British Army during the War of 1812, Fort George played a key role in the defence of Upper Canada. Today, the history is kept alive with trained interpreters sharing stories about life for soldiers and their families at the fort, along with redcoat musket demonstrations, Fife and Drum corps parades, tasty snacks made from historic recipes, and annual battle re-enactments to commemorate the pivotal Battle of Fort George—a major draw for historians from all over North America.

[www.parkscanada.gc.ca/fortgeorge](http://www.parkscanada.gc.ca/fortgeorge)

### Niagara Symphony Orchestra

Celebrating its 72nd season, the Niagara Symphony Orchestra (NSO) offers exceptional classical and contemporary orchestral music under the leadership of Bradley Thatchuk, the orchestra's 10th music director. A leader in music education, the NSO offers programs to inspire and nurture a life-long love of music alongside incredible, evocative performances.

[www.niagarasymphony.com](http://www.niagarasymphony.com)







# Sample MEDIA Coverage

# bon appétit

SPONSORED

## The Cyclist's Wine Guide to the Niagara Region

BY DESTINATION CANADA/TOURISM PARTNERSHIP OF NIAGARA  
OCTOBER 2, 2018



On the surface, there's certainly plenty to love about Canada's lush Niagara Region. Verdant and green, orchards and vineyards extend in every direction. In the distance, the fast-moving waters that plunge over Niagara Falls crash down with awe-inspiring, ferocious intensity. But much of what makes this green corner of the world special is actually underneath it. Translation: The soil here is special. Although the wine industry in the Niagara Region is relatively young—serious winemaking here dates only to the 1980s—the area is smack-dab in the middle of an ancient glacial plain, which over thousands of years has enriched the soil with pockets of different minerals and nutrients. This means that the terroir of one vineyard can wildly differ from another's just down the road. In other words, if you've tasted one Niagara wine, you most certainly have not tasted them all.

The natural forces that produce Niagara Region's great wines also make for breathtaking natural scenery, which is why the best way to experience it is on a bicycle. The country roads that link some of the area's best wineries are relatively flat, so cycling between them is a breeze. If you're worried about drinking and biking, don't be: Responsible cyclists either take modest sips or learn how to spit, which when done properly, can actually help you taste wine better. Plus, if you really dig some of the wines you've tried along the day's journey, you don't have to hold a bottle under your arm as you try to keep your bike steady. Many wineries in the area will arrange to have a bottle sent directly to your hotel, and we can't think of a better reward for a day of cycling than a glass of your favorite new Niagara Region vintage.





Whether you rent your own bike or join up with one of the wine region's [many bike tours](#), these are the stops you can't miss on an epic cycle through the area.

#### Jackson-Triggs Winery



A fantastic starting point for your cycle around town is the modern Jackson-Triggs Winery. The airy, glass-enclosed main building overlooks roughly 12 acres of finely manicured vineyards, with two-story-tall, garage-style doors that roll up on clear and sunny days to let in a gentle cross breeze. It's a gorgeous and open space that marries contemporary and traditional architecture, and you might be tempted to linger here all day. Nosh on tacos, cheese, and charcuterie at the on-site cafe, The Patio, or grab a glass of Sauvignon Blanc (or Pinot Noir, or Merlot, or any of Jackson-Triggs's other delightful offerings) and hunker down in the winery's 500-person-capacity amphitheater, which is built into the hillside of the vineyard. Don't leave without walking around the grounds; if you're lucky, you might glimpse grapes being crushed on the outdoor "crush pad."

#### Two Sisters Vineyards



From Jackson-Triggs, cycle past grassy fields lined with towering, leafy trees and through Niagara-on-the-Lake's historic old town. As you roll up to the estate of Two Sisters, scope out its towering pillars and grand, symmetrical windows; they're inspired by Renaissance architecture and the founders' roots in Italy's Campania region. The wines here, though, are all Niagara. Drop into the moodily lit tasting room for sips of the winery's small-production reds like Merlot, Cabernet Franc, and Cabernet Sauvignon, which helped earn Two Sisters the Best Performing Small Winery of the Year award from WineAlign's National Wine Awards of Canada in 2018. Pro tip: Take the [Experience Tour](#) and try a handful of vintages directly from French oak barrels in the winery's candlelit cellar. Afterward, hang out on the outdoor patio at Kitchen76, the property's Italian-inflected bistro. We're into the house-made pizzas like the Dolce e Salato pie, a sweet-and-savory creation piled high with creamy mozzarella, pungent gorgonzola, slices of pear, prosciutto di Parma, toasted walnuts, arugula, and honey.

### Peller Estates Winery & Restaurant



Although it's practically next door to Two Sisters, Peller Estates feels like it's in another country altogether. Specifically, France. You'll find Peller down a tree-lined private road that leads to a massive French-inspired château, which rises magnificently before you. Don't be intimidated, though: Some well-heeled diners dress to impress at the on-site Winery Restaurant, an elegant dining room with crisp white linens and twinkling chandeliers, but plenty of visitors hop off their bikes dressed more casually in cycling gear. (If you're here for lunch, pair Peller Estates' French-oak-aged Chardonnay with the fresh lobster linguine draped in Chardonnay-spiked cream sauce and slivers of black truffle.) Don't leave without dropping in on the property's Greatest Winery Tour, which grants visitors entrance to 10Below, the chilly downstairs lounge where everything—from the seats to the bar—is made with blocks of ice. Once inside, you'll be provided with a heavy winter jacket and a glass of ice wine made from late-season Riesling and Cabernet Franc grapes.

### Inniskillin



A short way down the leafy Niagara Parkway, which hugs the banks of the mighty Niagara River, you'll come upon Inniskillin, one of the oldest wineries in the area. The specialty here is Icewine, which is made from Vidal, Riesling, and other grapes that have been left to mature on the vine into the winter season. The result is a decadent, sweet wine with a concentrated, nectar-like flavor. Take a guided tasting inside Inniskillin's restored 1920-era barn or post up on the property's sprawling red brick patio, where on weekends, more than 200 cyclists a day will chill out at picnic tables shaded by large red umbrellas. Ice wine isn't just for dessert—it can also stand up to the hearty, unctuous fare from the property's walk-up Market Grill. Specialties include sandwiches brimming with tender 16-hour-smoked brisket, maple syrup pulled pork, and pulled chicken doused with ice wine-infused barbecue sauce. Make sure to leave room, though, for the fresh Malpeque oysters and gooey poutine.



### Caroline Cellars



There are roughly 40 bikes parked outside Caroline Cellars at any given time, and with good reason. Even with 20-foot-high ceilings, the dining room of the winery's Farmhouse Cafe feels warm and cozy thanks to the building's handsome Canadian pine paneling and homey, seasonally driven menu. Park your bike outside (or, if it's an e-bike, recharge it at the property's charging station) and settle in for rib-eye steak sandwiches and juicy sirloin burgers made with local meat, focaccia sandwiches stuffed with grilled golden beets and summer vegetables, and tacos conveying fried nuggets of local Lake Erie pickerel. Wash it all down with a sip of Caroline Cellars' house-made wines, which in addition to the usual reds and whites, include vintages made with local plums, cranberries, and blueberries.

### Stratus Vineyards



Feeling the burn in those quads? You've cycled a giant loop, and you're nearly back to where you started. Sleek and minimalist, the glass-and-concrete tasting room at Stratus Winery's LEED-certified facility—the first of its kind in the world—is filled with light all day long. It's only a small part of the entire estate, which spans a staggering 62 acres filled with 16 different grape varieties, from Petit Verdot and Sangiovese to Syrah and Tannat. Walk up to the long marble bar for a casual tasting, or pop into the property's petite, mesquite-wood-lined tasting room and pair Stratus vintages with local cheeses, dark chocolate, and sea salt shortbread. Afterward, bring your glass out to the couches on the large stone patio in back, which overlooks vines as far as the eye can see. The view is stunning, especially at sunset, making it the perfect place to conclude a long day of cycling.

Additional stops to consider:

Reif Estate Winery

Marynissen Estates Winery

Wayne Gretzky Estates Winery

Trius Winery & Restaurant

Big Head Wines

No matter if you choose to hit up one winery or a half dozen, cycling past rolling fields of vineyards and never-ending greenery is an unparalleled experience—one that simply can't be recreated in a car. After all, wine tasting in the Niagara Region is all about lingering, whether over a glass of crisp Riesling or a dusty country road. The joy is in the journey.

<https://www.bonappetit.com/story/the-cyclists-wine-guide-to-the-niagara-region>



# bon appétit

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## How to Have an Unforgettable Picnic in Canada's Niagara Region

BY DESTINATION CANADA/TOURISM PARTNERSHIP OF NIAGARA

OCTOBER 5, 2018



Given the jaw-dropping natural beauty of Canada's Niagara Region and the stunningly beautiful produce grown here, it's a downright shame to spend a moment longer indoors than absolutely necessary. That's why dining al fresco is the best way to enjoy all that this verdant part of the world has to offer. Even better, make it a picnic with help from some of the area's most delectable homegrown offerings. Not sure where to go? The 35-mile-long Niagara Parkway, one of the most pristine roads in Ontario and a direct route to Niagara Falls, features some of the most picturesque spots to chill out with a snack. Come with us on a quick tour of the most scenic of those spots, and all the tasty treats you can find along the way.

First Thing's First: Fill Your Basket at Walker's Country Market



SUSCH + BECK

Head directly to Walker's Country Market to stock up on supplies. Family-owned since the 1930s, this neighborhood staple has everything you need for a day's worth of picnicking. We're partial to the sandwiches stuffed with fillings like oven-roasted turkey breast with cranberry-orange sauce and ham glazed with maple syrup-spiked mustard, not to mention local produce like ruby-red strawberries, juicy nectarines, and freestone peaches. Just make sure you also save room for Walker's top-notch dessert options. The colorful, fresh-baked pies come in two sizes—large and mini—and are crammed with juicy fillings like peach, strawberry rhubarb, peach blueberry, grape, cherry, and more. We have a hard time playing it cool around the brittle candy display, though. There are also more varieties here than you can imagine, chock-full of almonds, chipotle-spiced peanuts, sea-salt-flecked peanuts, coconut flakes, sesame seeds, sunflower seeds, and more.

Then there's everything maple-flavored: maple syrup, maple cream cookies, maple sugar, maple syrup candy pops, maple butter, and maple candies. (This is Canada, after all.) Want more options? Adorable farm stands and marketplaces abound in Niagara—try nearby outfits [Parkway Orchards](#) and [Kurtz Orchards Farm & Marketplace](#).

For a Wine Escape, Stop at [Reif Estate Winery](#)



Toss your picnic basket in the car and drive half a mile down the road to Reif Estate Winery for your first picnicking stop. Established by one of [Niagara-on-the-Lake's](#) oldest wine families, Reif specializes in Niagara wines inspired by the founders' native Germany. Chief among them is ice wine, which has earned the operation a bevy of awards going back to the 1980s. Make sure to snag a glass or two in the main building—the look is German-villa-meets-Victorian-mansion—before selecting a spot to hunker down. We like the picnic tables in the gazebo area, which overlook a maze of grapevines, and the outdoor Sensory Garden, which is tucked behind an 1870s-era coach house.

The latter, framed by overarching trellises covered in gnarled vines and lush foliage, is a patchwork of flowers, fruit-bearing plants, and herbs meant to convey the flavors, aromas, and hues of Niagara's most famous wines. Supplement your BYO-picnic with treats from Reif's outdoor kitchen, which include hearty fare like sausages, burgers, thin-crust pizza, and a light-and-easy cheese and charcuterie plate.

Embrace Your Inner Gardener at the [Botanical Gardens](#)



NIAGARA PARKS

Heading south, find a spot outside the [Laura Secord Homestead](#), where you can experience history through the eyes of a Canadian heroine, and also enjoy delicious chocolates made by a company named in her honor. Afterward, stop by [Niagara's famous Floral Clock](#), which is recreated twice a year with up to 16,000 carpet bedding plants. Once you've finished your picnic, head onward to the Niagara Parks Botanical Gardens, which comprise 99 meticulously maintained acres jam-packed with perennials, rhododendrons, azaleas, herbs, and vegetables. There are



endless places to explore here, but standouts include the world-famous rose garden, which features more than 2,400 fragrant blooms, and the carefully manicured “parterre” garden.

For Something a Little Wilder, Hike the Niagara Glen Gorge



CHRISTINE NESS PHOTOGRAPHY

Farther south still, it's time to pull on your hiking boots and leave your car behind. Two-and-a-half miles of winding paths through forest, boulders, and prehistoric geological formations take you deep into the Niagara Gorge, where you'll find epic picnic spots at practically every turn. Primo lunchtime real estate include spots along the Glen Gorge, plus the area around the entrance to the park. After you're done, head down to the riverside platforms along the White Water Walk, where you can scope out the Class 6 white-water rapids below from a safe distance, and hike to the awe-inspiring Niagara Whirlpool, which was carved roughly 10,000 years ago by the mighty Niagara River.

Slow Things Down on the Dufferin Islands



CROWDPIFF UDC / BEYONDCOLLECTION

After all that hiking, you deserve a rest. Finish out your day on the Dufferin Islands, a peaceful nature preserve spread out over to acres just half a mile from Niagara Falls. Quiet and secluded, the area's many small islands are connected by a series of stone bridges and footpaths, making it a slam dunk for picnickers. A great destination year-round, it's also featured during the Winter Festival of Lights when it's transformed into a winter wonderland from November to January.

At this point, peek into your picnic basket. If it's empty, it's safe to call your day a success! If not, loop back up to Niagara-on-the-Lake and camp out in the gazebo in Queen's Royal Park, where the mighty Niagara River meets Lake Ontario. By sunset, this beautiful stretch of green is bathed in red-orange light, making it perfect for a picnic supper.

Hungry for more exploring in the Niagara Region? Visit Niagara has the deets on more must-visit hotspots.

<https://www.bonappetit.com/story/how-to-have-an-unforgettable-picnic-in-canadas-niagara-region>

# bon appétit

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## Around the World in St. Catharines

oddBird chefs Scott White and Justin Duc take us on a globally inspired tour of the Niagara Region's largest city.

BY DESTINATION CANADA/TOURISM PARTNERSHIP OF NIAGARA  
OCTOBER 2, 2019



PHOTO BY GUY A. BELL

Just north of the U.S.-Canada border and a quick drive from Niagara Falls, the quaint enclave of St. Catharines, Ontario, is a not-so-hidden gem, world-famous for its abundance of winding vineyards, fruit orchards, and rich farmland. Though modestly sized with a population of just 133,000, St. Catharines boasts a mighty dining scene that punches far above its weight class. One of the brightest stars in its colorful constellation of restaurants is oddBird, the eclectic eatery from chef-partners Scott White and Justin Duc. The duo's menu changes often and on a whim, and

influences are far-flung and far-ranging: Here you'll find anything from a blood-red horse heart tartare to sticky-sweet General Tso's duck breast to a massive côte de boeuf taco platter. But where do White and Duc eat when they're not in their own kitchen? To find out, the pair took us on a flavor-filled tour of their city's global gems.

### Ma Chinese Cuisine



First we stroll up to Ma, one of White and Duc's favorite haunts for Chinese eats. Though ensconced in an impressive red brick building dating back to the turn of the last century, it's the interior that'll really make you gasp. "It's just a gorgeous, wonderfully designed space," Duc said, his eyes darting around the dramatically lit dining room decked out with a wood-beam ceiling, stone floors, and industrial accents. We sit down and scope the menu, which delivers flavors straight from Hong Kong, Shanghai, Chongqing, and beyond. "Not only is the lobster juicy, tender, and deeply fragrant, it's one of the most spectacular



looking things you can get here,” Duc said, pointing to the gargantuan crustacean at the center of the table. We’ve ordered it sautéed with flavor-packed peanuts and crispy fried garlic, but you can also get it with ginger and scallions, underneath mountains of diced garlic, or wok-baked with soy sauce. Other can’t-miss menu items? Anything on the dim-sum menu, which includes authentic nosh like delicate steamed-shrimp dumplings and golden-hued egg tarts, not to mention the elegantly plated Peking duck. “It’s refreshing to have real Chinese food in St. Catharines, and not just some Americanized version of Chinese food,” White said. “This place is the real deal.”

#### **Lang Restaurant**



Just three blocks away, our taste buds shift from China to Vietnam. Grilled meat and hot pot are the dual focuses of Lang BBQ, which White and Duc dig for its bang-on flavors and homey atmosphere. The duo make quick work of the menu, ordering up slivers of fatty pork belly, springy squid balls, and coins of lotus root to simmer in fragrant broth.

While it bubbles away, we spark up the grill built right into the table and char slices of curried chicken and Vietnamese sausage over a crackling flame. “It’s a cool family-style thing, really interactive,” said White. “It reminds me of Christmas when I was a kid with my meat fondue!”

#### **Sahla Thai Restaurant**



Less than a 10-minute walk away is Sahla Thai Restaurant, White’s go-to Thai joint. “It’s kind of my family spot,” he said. “We all have our birthdays there.” Without hesitating, White orders a steaming plate of piled-high pad Thai—the classic rice noodle dish stir-fried with shrimp, chicken, eggs, bean sprouts, green onions, and finely chopped peanuts—and follows it up with a creamy bowl of Penang curry enriched with coconut milk, peanut curry sauce, and slivers of beef. “Their curry has just the right level of spice, the perfect consistency, and the flavors are just killer,” he said, spooning the rich sauce over a mound of fluffy white rice.

### La Scala Ristorante



After a five-minute walk down St. Paul Street, St. Catharines's bustling main artery lined with boutiques and restaurants, we hang a right down a relatively quiet side street to find Italian mainstay La Scala. White and Duc make a beeline for the charming outdoor terrace and snag a table. "It's got one of the nicest patios in the whole downtown area, plus the food is really authentic Italian," Duc said. We order a bevy of delights: the panini stuffed with thin slices of prosciutto, roasted red peppers, and creamy fiore di latte; a mound of juicy P.E.I. mussels draped in an anise-flavored black sambuca sauce; a hearty plate of penne classico smothered in a rich homemade sauce of San Marzano tomatoes; and herb-marinated calamari grilled to crispy perfection.

### Chile & Agave



Next up, we pile into the car and drive 10 minutes across town to Chile & Agave for a midday pick-me-up. "It's probably some of the most authentic Mexican food you can get in St. Catharines," White said of this colorful hangout jam-packed with vibrant, straight-from-Mexico decor. We opt for specialties including the tacos Yucatan, which come stuffed with jumbo grilled shrimp glazed with tequila-spiked honey, and a platter of flour quesadillas overflowing with tender slices of nopal cactus. Of course, Duc notes, we can't leave without tossing back a shot or two. "The tequila tasting is always good," he said.



### George's Greek Village



Though we're nearly stuffed, we begin to feel hunger pangs as we drive the five minutes to George's Greek Village. It's a miracle! Before we even look at a menu, White puts in an order for the grilled octopus drizzled with ouzo. "It's rare to find octopus on a menu here, and it's even harder to find octopus that's done well," he explained. "It's a good indicator of a quality spot." We round out the meal with the restaurant's dramatic saganaki—a hearty slab of decadent kefalotiri cheese sauteed in olive oil and flambéed tableside—and a smattering of creamy dips from roe-infused taramasalata to garlicky skordalia.

Our daylong eating tour concluded, it's finally time for White and Duc to put away their appetites. Or is it? "We're headed to oddBird," White said with a laugh. "It's time to cook dinner."

Still hungry for more Niagara eats? [Visit Niagara](https://www.bonappetit.com/story/around-the-world-in-st-catharines) has you covered with a rundown of delectable restaurants, wineries, farmer's markets, and more.

<https://www.bonappetit.com/story/around-the-world-in-st-catharines>

# The Washington Post



## Escape to Niagara, Canada

Experience the healing power of nature

**S**cientists have long believed that spending time in nature positively affects our health and happiness. One finding in particular provides great news in our ever-connected world: it only takes three days for our minds to reap the benefits of the great outdoors.

The phenomenon called the "three day effect" describes how this short amount of time lets our brains relax, leaving us feeling mentally reset. If you're itching to experience this healing power of nature, you're in luck: There's a hidden gem waiting for you just beyond the U.S. border in Canada's Niagara region.



Thirty minutes north of Buffalo and bordered on the east by the Niagara River is a jewel of a peninsula ripe with opportunities to connect with nature. While most Americans associate Niagara with its popular Niagara Falls, the region boasts many other lesser-known—and quieter—outdoor vistas, especially near Niagara-on-the-Lake on the shore of Lake Ontario. Fittingly, Niagara Falls is also said to be the world's largest generator of negative ions, which are believed to have positive health effects.



Photo credit: Susan Portney

You'll be amazed by Niagara's diverse landscapes: lush vineyards and orchards are close to fairytale forests and river canyons. You'll also find good old-fashioned, small-town charm here. Whether you're looking for nature to offer a grand adventure, or a slower, relaxing getaway, you won't be disappointed.

And, because science tells us three days is all it takes to feel revitalized and refreshed, we put together a plan for your Niagara escape.

### **Day 1: Rewind the clock and escape into nature**

First, consider accommodations that will set the mood. Niagara-on-the-Lake is full of historic bed-and-breakfasts that will transport you to a time before technology. One of the most popular destinations is [the Prince of Wales hotel](#), where you'll be spoiled by luxury with a Victorian sensibility. Established in 1864 and beautifully restored in 1998, the hotel offers all of the modern amenities you'd expect while capturing the genteel look and feel of yesteryear.

Named after a historic stay by the Duke and Duchess of York in 1901 (later they would become King and Queen of the United Kingdom), every room is different and adorned with the utmost care, so every guest feels like royalty. Upon waking up, take a five-minute walk to the water's edge and enjoy a morning stroll to familiarize yourself with the area.



Photo credit: Susan Portney, Prince of Wales Hotel

Grab a picnic basket, then take a quick drive over to Walker's Country Market – a favorite spot local spot to browse fruit. In Niagara, the farm-to-table lifestyle is not just a trend, but a tradition. There are thousands of acres of orchards and fruit farms, many owned by families over generations.

First opened in 1930s as a tiny little stand sporting a single umbrella, Walker's Country market has grown into one of the region's most beloved attractions and is still owned by the same family four generations later. Spend some time looking around before deciding how to fill your basket.

At the front, wooden bins are filled with delectable farm-grown, ripened-on-the-vine peaches, nectarines, cherries and other fruit, harvested from the market's own orchards. Eat them as is or try Walker's unbeatable homemade fruit pies and muffins. There's also a tasty assortment of handmade butter tarts and a variety of jams with surprising flavors such as peach and blueberry, peach and lavender or strawberry chipotle that you can take home with you. The sandwiches are also to die for; we recommend the devilled-egg salad.





Photo credit: Susan Portney

The perfect place to enjoy these provisions? How about anywhere along the picturesque Niagara Escarpment? As one of 18 UNESCO World Biospheres in Canada, the Niagara Escarpment is internationally recognized for the conservation and protection of a diverse range of plants and animals. Find your way to Queenston Heights Park, which has two picnic pavilions. Enjoy your Walker's Country Market finds within this breathtaking setting, and stick around long enough to digest your meal—you have a long hike ahead of you.

Canada's oldest and longest footpath, The Bruce Trail, is part of the Escarpment and extends over 550 miles. While many avid trekkers tackle the full length of its mixed terrain, morning strollers and casual hikers can also delight in the verdant forest path that defines the first five miles. Look for the giant stone cairn near the parking lot that serves the Pavilion in Queenston Heights Park; then follow the white blazes (white vertical rectangles framed in black that are painted on the trees) and let them guide your way.



Photo credit: Susan Portney

The dozens of tree and wildlife species you'll encounter are worth learning about before you get started so that you'll appreciate their presence that much more.

The trail is open year-round and there's no bad time to explore. In summer, it's a universe of green, in autumn the fall colors will take your breath away and it's absolutely gorgeous in the snow.

## Day 2: Adventure awaits on the water

A 20-minute drive from Prince of Wales hotel hangs the Whirlpool AeroCar. From April through October, this 103-year-old cable car—the only one of its kind in the world—soars over the Niagara Gorge suspended 250 feet in the air. You'll feel a jolt of adrenaline when the carriage gets underway, but you'll soon be enthralled by the spectacular class-6 whitewater rapids and massive turquoise whirlpools that churn like a witch's brew. A guide narrates the 20-minute journey, calling out points of interest and arming you with trivia you can use at your next cocktail party. For example: Did you know that during the ride you'll cross the border from Canada to the U.S. and back again four times? And don't worry about which way you face when you get on: you'll switch sides mid trip ensuring you won't miss a thing. (If you're looking to get closer to the action, try actually riding the rapids on the Niagara whirlpool jet boats.)





Photo credit: Susan Portney



Make your way back to the hotel for high tea overlooking the garden in the award-winning Drawing Room. Canada's first tea sommelier has handpicked an eclectic mix of teas: Heavenly Cream, Jasmine Snow Dragon, Wild Mountain Honeybush Chai, and Ginger Twist are just a few flavors from the extensive, curated list to choose from. In keeping with authentic English tradition, you'll also be served delicious homemade pastries, finger sandwiches and the hotel's signature scones.

Or, if you're arriving closer to dinner time, grab a table at the [Prince of Wales Hotel Restaurant](#), which promises a gorgeous view of Simcoe Park where the flavor and surroundings pair perfectly.



Photo credit: Prince of Wales Hotel

### Day 3: Discover the land

Today calls for a change of pace from water to land: There are over 130 vineyards in the Niagara region, including over 25 within minutes of each other in Niagara-on-the-Lake.

In fact, they're so close, you can bike between estates while relishing the fresh air among miles of vineyards extending further than the eye can see. Companies like [Grace Escape](#) make cycle-touring simple by partnering with winegrowers. You'll sample as many as 12 award-winning wines as the local winemakers explain how their product goes from grape to glass.



Photo credit: Susan Portney



Or you can opt for a solo journey, map in hand, and discover this underrated wine region for yourself. Thankfully, no matter which option you choose, the bikes come with bottle cages so you can safely bring a few tasty souvenirs back with you.

(If you're visiting in winter, you're in luck: Niagara produces the best icewine in the world, where they let grapes freeze on the vines in winter. Niagara-on-the-Lake's January icewine festival is worth its own trip!)



Photo credit: Susan Portney

Finish up at *Ten Sisters Winery* where you'll explore the grapes with a guide then hit *Kitchen 26*, the winery's beautiful in-house restaurant. Ask for a seat on the sprawling, renaissance-inspired veranda where you'll unwind with a sweeping view of the grounds and delicious Italian cuisine.

Whether you're a thrill-seeker, or someone who derives energy from slowing down and taking in your surroundings, a trip to Niagara-on-the-lake will leave you feeling revitalized, ready to return home with a new sense of connection to the world around you.



<https://www.washingtonpost.com/brand-studio/destination-canada-escape-to-niagara-canada/>



# THE NEW YORKER



In the early 1800s, Napoleon Bonaparte's brother, Jerome, traveled from New Orleans to Niagara Falls for his honeymoon. Local lore says he helped turn the area into a top honeymoon destination as he likely regaled others with stories of bright blue-green water, lush landscapes, and towering rock formations. Fast forward more than 200 years and Niagara is still a destination for honeymooners, as well as for countless others who see the region as an outdoor fitness and adventure destination.

Like their visitors, the falls are constantly in motion. Formed over 12,000 years ago by melting glaciers, more than 3,000 tons of water flows over the edge of the falls each second into the basin below. Niagara has long been the No. 1 destination for Americans visiting Canada, but it is much more than just a neighborly natural wonder: It's a unique place for those seeking an outdoor escape from their everyday lives, with mental and physical benefits they might not have anticipated.

## The DRAW of the GREAT OUTDOORS



Much like Henry David Thoreau wrote in "Walden," "We need the tonic of the wilderness." Being in nature is more than just an experience; researchers have proven that exercising in the outdoors increases positive feelings and decreases the symptoms of depression. And places like Niagara provide the perfect natural setting.

"There's a lot of great science regarding our endocrine system and our hormones, and how exercise can help regulate emotions like stress, depression and anxiety," says Margaret Wallis-Duffy, a wellness expert and C.E.O. of Wallis for Wellness, an integrated health clinic in Ontario, Canada.

"Exercise helps to increase the amount of oxygen in your blood [and] the release of 'happy' hormones like dopamine and serotonin, which help regulate cortisol—the stress hormone," Wallis-Duffy says. "You add nature into that—where you are breathing in the clean air from the trees and the negative ions of streams and waterfalls—and it helps improve your immune function, normalize breathing rates, decrease blood pressure and lower stress levels."

## *The NIAGARA REGION and WELLNESS*

Scientists around the world are discovering more about the positive mental effects of outdoor exercise. In a recently-published study, Martin Niedermeier, a PhD student at the University of Innsbruck in Austria found that those who went on a mountain hike reported greater calmness and elation, and a decrease in anxiety compared with those who exercised on a treadmill or not at all.

"There is evidence that nature/green environment is providing a lower complexity and less (visual) stimuli compared to an urban or an indoor setting. This is discussed as a reducing factor for perceived stress and might also result in more positive affective responses," Niedermeier said in an interview.

Along with the psychological benefits of exercising outside, there are quite a few physical benefits, too. John Stanton, founder of Running Room, says that running outdoors is great for the proprioceptors, or the nerves that help us create balance. It also helps build up muscles in a different way than if you were on a treadmill. "You're making turns, changing your stride, going up and downhill in various weather conditions," Stanton says.

One of the more popular areas for outdoor running in Niagara is the Niagara River Recreation Trail, says David Adames, Chief Operating Officer for Niagara Parks. From the recreation trail, you can access a staircase that takes you down to Niagara Glen, where you can run on nearly two and a half miles of trails near the water. Additional stairs accessed along the trails lead to a whirlpool, which is about 280 feet from the recreation trail.

There is also a cross-border marathon that originally started in 1974. Runners enjoy trekking through the beautiful Niagara scenery as well as the excitement of running through two countries in one race.

Stanton says that while starting out on a treadmill is great, there is nothing that beats going on a run outside to reduce stress. "There's a thrill to it and a sense of achievement, empowerment, and accomplishment."



With Niagara Parks' trails and paths spanning nearly 35 miles alongside the Niagara Parkway between Lake Ontario and Lake Erie, visitors are given a chance to explore the outdoors while experiencing one of nature's most magnificent marvels.

The wildlife is abundant too. You may see foxes or deer or witness vast gatherings of migrating birds. There are also a number of historic sites along the trail. Closer toward the Niagara Glen Nature Centre, the trees diminish as the beauty of the gorge unfolds. "It's a very unique geographic space with a lot of geological history," Adames says. "It was glacially carved out over thousands of years." Niagara Glen offers plenty of moderate to difficult hiking trails, the most challenging being the Whirlpool Trail, which features steep sections and uneven surfaces but guides you to the Niagara Whirlpool.



## *The ADVENTUROUS SIDE of NIAGARA*

Since 2015, Niagara Parks has taken a special interest in wellness as a way to tune into its visitors. Along with emphasizing the benefits of exercise on its many trails, Niagara Parks recently achieved Feast ON certification for all five of its restaurants, meaning at least 25 percent of all food and drink is supplied by local farmers and distillers. "We are thinking not only about the benefits of eating locally-sourced food, but also how the food is prepared and served," Adames says.

Recently, Niagara Parks added a new one-of-a-kind wellness experience to its activities roster: Namaste Niagara. Launched in 2016, it gives 40 people at a time a chance to do yoga on the waterfall's lower observation deck at Journey Behind the Falls on select days during the summer. "The idea of restorative yoga taking place in such a unique place allows people to fully appreciate nature and the power of the falls," Adames says.

Exercise is also possible on the water. Kayaking is a full body workout without being too extreme, says Lisa Palmer, owner of Niagara Kayak Rentals. "It really involves the use of your core, but you also need to engage your legs in order to paddle," she says. "With the right posture, you are even exercising the muscles in your fingers. After two hours even on a more leisurely ride, you'll feel it," she says. Niagara Kayak Rentals leads guided tours generally departing from one of two locations. The kayak trip departing from Queens Royal Park is more leisurely and allows kayakers to view historic sites and animal life.

But the more popular route, Palmer explains, is one departing from Queenston Heights, at the base of the escarpment. Paddlers launch in a more turbulent area but enjoy breathtaking scenery and a faster, one-way current. Palmer also explains the added mental benefit to being out on a kayak. "It's quieter out on the water and you can really be a part of nature," she says.



Those looking for a little more adventure can climb the walls of the gorge in designated bouldering areas. More extreme sports like these offer their own kind of health benefits. Studies have shown that short bursts of adrenaline can help with focus and controlling fears and anxiety. And like other sports, they can also leave you with an increased feeling of happiness.

Niagara offers an extreme experience in ziplining to the falls. It's an adventure that's available to everyone, no matter their physical ability, says Rich Merlino, general manager at Wildplay Niagara Falls, the company that runs the zip line and an adventure ropes course near the falls.

"I like to refer to it as a rush of adrenaline but in a low-risk environment," he says. Because of its seated harness system, anyone over the age of seven can zip line, even those who may need the assistance of a wheelchair. "It's a really liberating experience," Merlino says.

You also get to see the falls from a viewpoint not many others can, zipping through the mist at up to 40 miles an hour.

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### *Where BEAUTY and WELLNESS MEET*



An added bonus to exercising and exploring near Niagara is its mass production of negative ions. While there are molecules all around us, this type can affect your wellbeing, says Wallis-Duffy.

A quick chemistry refresher: Ions are clusters of atoms with a positive or negative charge. Computers and other forms of technology are known creators of positive ions. Some allergens also have a positive charge. Free radicals are molecules that are missing an electron, and are often found in urban areas. The collection of free radicals in the body has been found to contribute to multiple underlying health conditions. Negative ions, on the other hand, counterbalance these atomic structures. They are said to attach to positive ions and allergens, causing them to fall from the air, as well as attach to free radicals, neutralizing them.

"All of these things we take in can have a negative impact on our immune system, on our cardiovascular system," Wallis-Duffy says. "Having more negative ions, which we can get from being near waterfalls, running water or surf, helps to neutralize those free radicals we take in."

Niagara's sense of happiness may be partially found in its visitors—honeymooners, exercise enthusiasts, and families—but it may also have something to do with its air.

"When you are increasing your oxygen through exercise, and then being outdoors with negative ions, overall you are feeling happier because you are regulating your cortisol levels," Wallis-Duffy says of the Niagara region.

Enjoying the outdoors doesn't necessarily have to be strenuous, especially in Niagara, Adames says. "Simply taking a walk through Niagara Parks can bring you a feeling of relaxation as you explore the abundance of trails, gardens, and green spaces found along the shores of the Niagara River. There's nothing quite like it."

<https://paidpost.newyorker.com/article/canada/falling-for-niagara>



# 2018-2019

## KEY ACCOMPLISHMENTS

### Earned Media

#### Coverage Overview

- 77,475 Total Stories
- 19,957,228,296 Potential Audience Size
- 516,822,863 Total Nielsen TV & Radio Audience
- \$102,577,616 Total Calculated Ad Value
- \$300,763,579 Total Calculated Publicity Value
- 106:09:19 Total Runtime

### Paid Media

#### Coverage Overview

- 401,428,414 Total Impressions
- 1,229,550 Total Clicks
- Primarily targeted ready to travel users within an 8-hour driving radius
- Impressions cast across a multitude of platforms, including display, video, digital billboards, articles & social

### Influencers

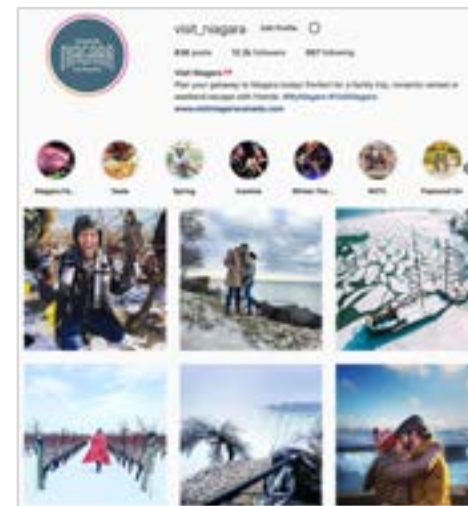
#### Coverage Overview

- Over 10 high profile influencers for paid press trips
- 2,197,600+ Social Media Reach; included Instagram Stories, Posts, Facebook Posts, Tweets, Vlogs, Blogs & Website Articles

### Community Management

#### Coverage Overview

- Active community management & engagement:
  - 57,610 Facebook Page Followers
  - 58,591 Facebook Page Likes
  - 12,171 Instagram Followers
  - 8,828 Twitter Followers
- 13,000,000 Impressions on Facebook
- 108,000 Facebook Clicks
- 39,000 Facebook Audience Engagements
- 1,300 Twitter Likes
- 536 Twitter Retweets
- 2,000 Twitter Audience Engagements
- 938 Instagram Comments
- 40,000 Instagram Likes
- 41,000 Instagram Audience Engagements



# Marketing OBJECTIVES

- Promote emotive authentic messages to key audience segments based on interests and affinities
- Highlight the unique qualities of the Niagara Region, generating 'Awareness and Consideration' for visitors that are in-market for travel
- Increase demand for drive-distance travellers as well as short and mid-haul fly-markets, promoting urban escapism and reconnection to family, friends and self
- Make VisitNiagaraCanada.com and its social channels a meaningful resource for consumers in the 'Awareness and Consideration' phase of their consumer path to purchase

The Tourism Partnership of Niagara will make data-driven marketing decisions.

This process will inform decisions on:

- Overall Objectives & Goals
- Strategy
- Tactics

TPN will define the following:

- Consumer Profile – key targets
  - Messaging style based on Consumer Segments
- Geographic Target Market - Where they reside
- Timing - When to target consumers
- Message Deliver Platforms
  - How best to optimize for cost, reach and relevant efficiencies







Thank you.





# Niagara Sport Tourism Report

Planning & Economic  
Development Committee



Centre for Sport Capacity

July 10, 2019

Julie Stevens, Ph.D.  
Centre for Sport Capacity



In 2017, there were **259,000 sport tourists who came to Niagara and spent over \$45 million** (Niagara Tourism Profile, 2019).

BUT.... A “**void**” in Niagara’s sport tourism market exists....

The purpose of this report is to provide Niagara Region council and staff with the information they need to **make evidence-based decisions about building a Niagara sport tourism model for the future.**



**Definition: sport tourism is defined as sport events that attract people from outside the community, whether for a few hours or a few days.**

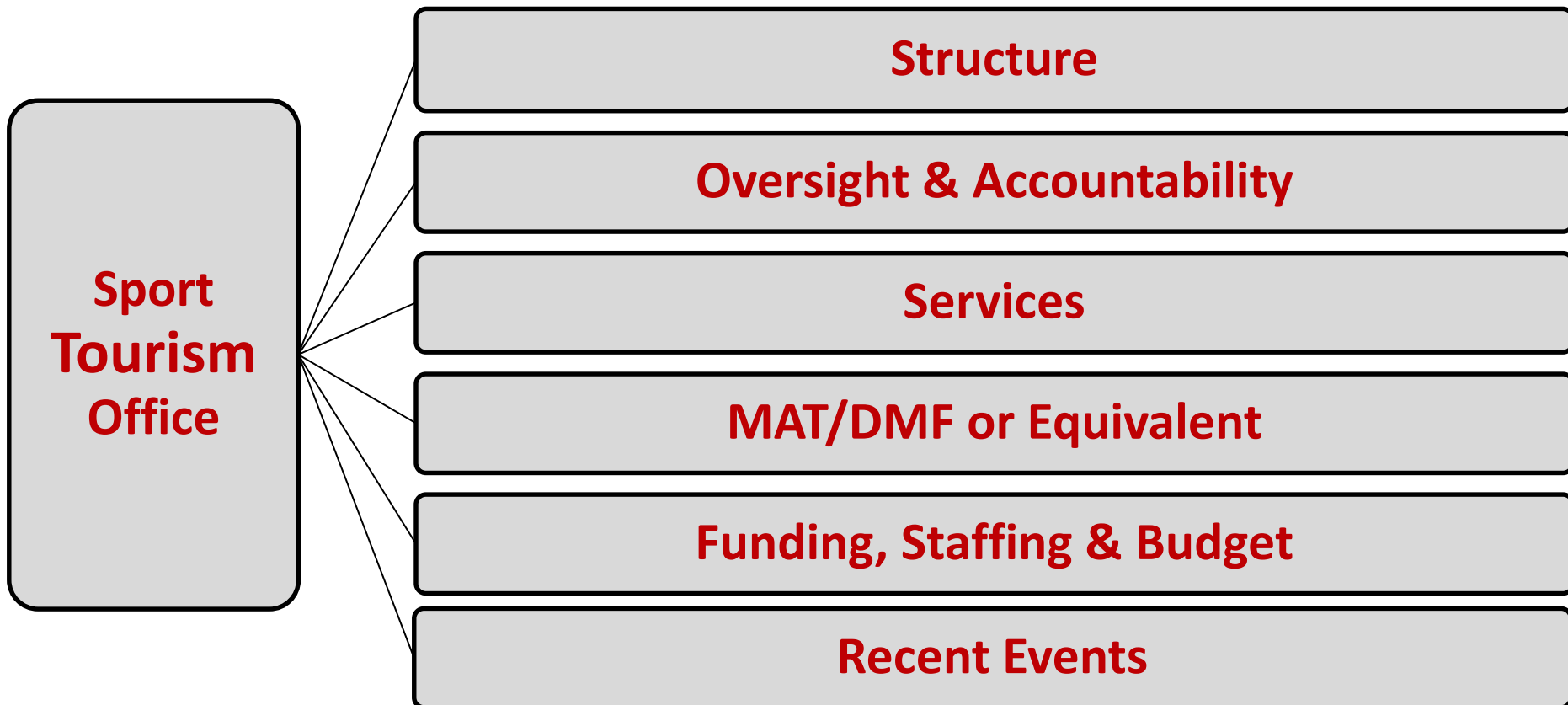
## **1. Environmental scan:**

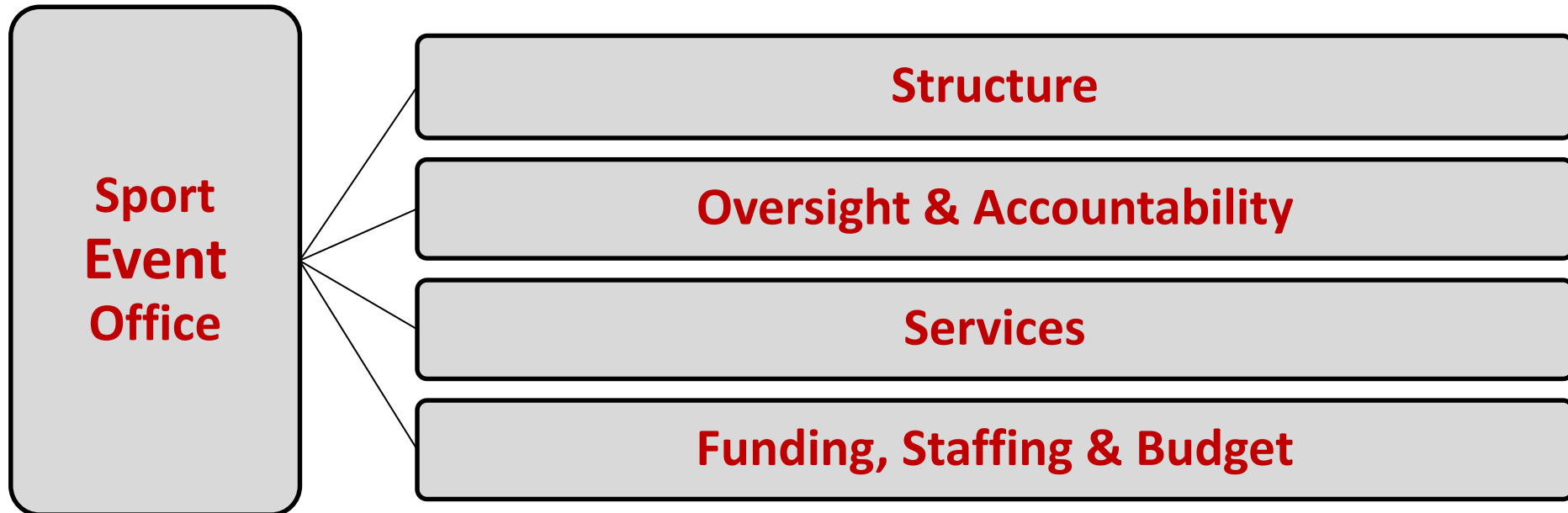
- a. Nine (9) municipalities;
- b. Neighbouring communities; mid-size municipalities; established reputation in sport tourism.

## **2. Interviews and focus groups:**

- a. 64 Niagara stakeholders;
- b. 48 organizations;
- c. Public, non-profit and commercial sectors who connect with sport tourism.









## ***Sport tourism is an important contributor to the Niagara economy***

- Sport tourism is valuable business for Niagara;
- Competitors aggressively taking advantage of economic benefits.

### ***Recommendation #1:***

***The Niagara Region recognize sport tourism as a key component of future economic development initiatives.***

***Niagara needs a central, region-wide sport event office.***

- Coordinate and communicate for whole region
- “Strong Voice” – proactive bidding.

***Recommendation #2:***

***An arm’s-length sport event office be established.***



## ***A sport event office requires sustained operational and bid funding.***

- Niagara Region funding support:
  - Operational – arm's-length; Region funded
  - Bid Fund – Region funded; seek partner support as needed.

### ***Recommendation #3:***

***The Niagara Region provide stable, long term operational funding for a sport event office.***

### ***Recommendation #4:***

***The Niagara Region provide stable, long term funding for a sport event bid fund.***

***A sport event office should offer high-level (strategic) as well as low-level (tactical) services.***

- Sport event bid development;
- Activate business value in all types of event (small, medium and large-scale).

***Recommendation #5:***

***The Niagara sport event office develop a 'diverse portfolio' strategy for sport event bidding and hosting.***

***Recommendation #6:***

***The Niagara sport event office offer event bidding and evaluation services.***



***A Niagara-wide sport event office would unite the region behind one competitive 'Made-In-Niagara' vision and strategy.***

Niagara needs a sustainable sport tourism model with a long-term outlook.



# Thank You

# Question



Centre for Sport Capacity

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**Subject:** Niagara Peninsula Conservation Authority (NPCA) Board – Options for Future Board Appointments

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, July 10, 2019

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## Recommendations

1. That the selection process for appointments to the Niagara Peninsula Conservation Authority Board of Directors set out in Report CLK 10-2019, **BE APPROVED**, namely:
  - a) That six (6) Regional Councillors be appointed to the NPCA Board, that may or may not represent six local area municipalities;
  - b) That six (6) citizen members be selected using the criteria outlined in the skills matrix attached as Appendix 1;
  - c) That a selection panel be established that includes three (3) of the members of Regional Council appointed to the NPCA Board of Directors and two (2) Regional Councillors not appointed to the NPCA Board of Directors;
  - d) That Niagara Region undertake the advertisement and selection process for the citizen members;
2. That this appointment and selection process **BE USED** for the appointment of members to the Niagara Peninsula Conservation Authority Board of Directors effective for the 2022-2026 term of Regional Council.

## Key Facts

- The purpose of this report to seek Council's approval for a process for selecting citizen members to the NPCA Board of Directors.
- At its meeting held on February 28, 2019, Regional Council passed a resolution directing staff to develop a process for the lower tier municipalities to use to determine a local representative to the NPCA Board of Directors.
- Council subsequently appointed representatives to the NPCA Board of Directors for the current term of Council that included citizen members.
- NPCA recommended that a list of competencies be modelled from the Alberta Public agencies matrix.
- Council has expressed a desire to formalize a process to be used to select members for appointment to the NPCA Board of Directors.



## Financial Considerations

Remuneration for the NPCA Board of Directors is funded through the Niagara Peninsula Conservation Authority annual budget. Staff resources will be required to assist with the advertisement and selection panel.

## Analysis

At the Regional Council meeting held on June 20, 2019, staff were requested to consider having NPCA related matters brought forward to the Planning and Economic Development Committee for consideration.

Pursuant to the *Conservation Authorities Act*, Regional Council is the body responsible for the appointment of members representing Niagara Region on the NPCA Board.

The composition of the Board as well as qualifications to be a board member has been an area that Regional Council has expressed an interest in formalizing.

At its meeting held on February 28, 2019, Regional Council passed the following resolution:

1. *That Correspondence Item CL-C 18-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated February 28, 2019, respecting Niagara Peninsula Conservation Authority Board Appointments, **BE RECEIVED**;*
2. *That Regional Council **EXTEND** the appointments of Councillors Bylsma, Chiocchio, Foster, Gibson, Greenwood, Heit, Huson, Insinna, Jordan, Steele, Whalen and Zalepa, on the Niagara Peninsula Conservation Authority Board for an additional period of three months;*
3. *That the Niagara Peninsula Conservation Authority Board **BE REQUESTED** to provide recommendations respecting Board composition and the recommended qualifications and process for appointments to the Board to Regional Council for consideration;*
4. *That the Board of Directors of the NPCA **DETERMINE** the types of skills and/or experience required on this Board of Directors based on the mandate of the NPCA and subsequently providing a skills matrix for purposes of selecting those members to Regional Council before the end of April 2019;*
5. *That staff **BE DIRECTED** to develop a process that all lower tier municipalities can follow to determine who they will recommend as their representatives to the NPCA Board of Directors before the end of May 2019; and*

6. That staff **BE DIRECTED** to develop a process that will determine a fair and acceptable mix of politicians to be responsible to Niagara taxpayers to serve on the NPCA Board of Directors along side those chosen via the skills matrix before the end of May 2019.

The process that Niagara Region has followed for the appointment of members to the NPCA Board was to first to ask the Regional Councillors who represent the municipality requiring representation whether or not they are willing to sit as a member of the Board. In the event that none of the Regional Councillors representing the municipality wish to serve on the Board, then the local municipality's council is notified. Generally speaking, the local council then determines if one of their respective council members has an interest in serving. If neither one of these steps achieves a representative, then the local municipality recommends a local citizen based on their selection process. As noted above, the representative is recommended to Niagara Regional Council for appointment.

At its meeting held on December 6, 2018, Regional Council appointed 12 representatives on an interim basis for the Niagara Peninsula Conservation Authority Board. On May 16, 2016, Regional Council appointed four citizen members with an additional two citizen members being appointed on June 20, 2019. Currently seven of the 12 local area municipalities have recommended citizens as the representative for their local municipality. Two municipalities have recommended Councillors, those being Wainfleet (municipal Councillor) and Pelham (Regional Councillor). Seven municipalities have that their representative appointed by Regional Council. The local area municipalities are to submit their recommendations for representatives by July 31, 2019.

As confirmed by the Courts, Niagara Region is entitled to appoint 27 members in accordance with the *Conservation Authorities Act*. Negotiations are ongoing with respect to the number of representatives for Niagara Region in accordance with Council's resolution from its Special meeting on May 16, 2019, which directed the Regional Chair and Acting Chief Administrative Officer to begin negotiations with Hamilton and Haldimand respecting board composition.

Staff are recommending that the citizen appointments follow a similar process that is used to select the Niagara Regional Police Services Board citizen member. This process appoints two Regional Councillors to a selection panel that also includes those Regional Councillors appointed to the Police Services Board. Citizens interested in serving on the Police Services Board complete an application, which is then scored against a matrix. From the results of the matrix, the Selection Panel determines which candidates will move forward to the interview stage. The interview is held in coordination with Niagara Region Human Resources staff to determine the most

suitable candidate. Candidates are scored based on their responses to questions. The recommended appointee is then considered by Regional Council for appointment.

This process could be utilized for the NPCA Board members as it ensures consistency in both the selection process and of the selection committee; however, does not include the local area municipalities in the process. Niagara Region would conduct the process, including advertisements for interested citizens.

Appendix 1 includes a draft criteria scoring matrix and competency description that is recommended to score interested citizen applicants. The use of a skills matrix was a recommendation of the Auditor General and supported by NPCA as noted in the Auditor General's report. The matrix, modelled from the Alberta Public Agencies, matrix, demonstrates competencies with the intention of balancing professional experience and knowledge of the NPCA as well as personal attributes and skills. Using the scoring matrix, the selection panel would be able to determine which candidates would move forward to an interview.

### **Alternatives Reviewed**

The local area municipalities could undertake the appointment process for citizen members utilizing a local municipal selection committee that would be required to score candidates based on a skills matrix and questions provided by Niagara Region. This would ensure consistency for the selection of members. Once the suitable candidate is determined, the local area municipality would make a recommendation for appointment to the Board.

Should an agreement to have 15 members on the Board representing Niagara Region be approved, staff recommend that eight of the 15 be elected officials with the remaining seven being citizen representatives.

### **Relationship to Council Strategic Priorities**

This initiative falls in line with Council's draft strategic priority of Sustainable and Engaging Government, specifically it reinforces Niagara Region's commitment to high quality, efficient, fiscally sustainable and coordinated core services through enhanced communication, partnerships and collaborations with the community.

### **Other Pertinent Reports**

CL-C 39-2019      Niagara Peninsula Conservation Authority Board Appointments



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**Prepared and Recommended by:**

Ann-Marie Norio  
Regional Clerk  
Corporate Services Administration

---

**Submitted by:**

Ron Tripp, P. Eng.  
Acting Chief Administrative Officer

*This report was prepared in consultation with Donna Gibbs, Director, Legal and Court Services.*

**Appendices**

Appendix 1            NPCA Board of Directors Applicant Criteria Scoring Matrix    page 5

NPCA Board of Directors Applicant Criteria Scoring Matrix

			APPLICANT									
			APPLICANT 1	APPLICANT 2	APPLICANT 3	APPLICANT 4	APPLICANT 5					
Criteria		Points										
1	Specific knowledge or experience the following:											
a.	Business/Management/Finance/Budgetary	5										
b.	Governance experience	5										
c.	Community/Stakeholder Relations	4										
d.	Strategic Thinking/Planning Skills	3										
e.	Risk Management/Audit	3										
f.	Public Relations	3										
g.	Leadership/Teamwork	3										
h.	Human Resources/Labour Relations	3										
i.	Government/public policy/policy	3										
j.	Legal/ Regulatory	3										
2	Knowledge of:											
a.	Functioning of a Municipal Governing Body	5										
b.	Familiarity with <i>Conservation Authorities Act</i>	5										
c.	Understanding of the NPCA role and mandate	5										
	Maximum Score	50	0	0	0	0	0	0	0	0	0	0

#### Business/Management/Finance/ Budgetary Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise in sound management, operational business processes/practices, accounting or financial management within the private or public sector. This competency may include an understanding of topics such as managing complex projects, leveraging information technology, planning and measuring performance, allocating resources to achieve outcomes, analyzing and interpreting financial statements, evaluating budgets and understanding financial reporting.

#### Governance Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise in board governance in the private, public, and/or voluntary/non-profit sector. The applicant has a clear understanding of the distinction between the role of the board versus the role of management. Governance experience could be acquired through prior board or committee service or reporting to/or working with a board as an employee.

#### Community/Stakeholder Relations Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise of the community or communities the NPCA serves, including the stakeholder landscape affecting the public agency. This may include a demonstrated capacity to build networks and foster trusting relationships with communities and stakeholders.

#### Strategic Thinking/Planning Skills

- The applicant demonstrates an ability to think strategically, identify and critically assess strategic opportunities and challenges facing the NPCA, develop effective strategies and engage in short, medium and long-range planning to provide high-level guidance and direction for the NPCA.

#### Risk Management/Audit Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise in enterprise risk management. This may include identifying potential risks, recommending and implementing preventative measures, and devising plans to minimize the impact of risks. This competency may also include experience or knowledge of auditing practices, organizational controls, and compliance measures.

#### Public Relations

- The applicant has experience with, or is able to demonstrate knowledge or expertise in communications, public relations or interacting with the media. This may include knowledge of advocacy and public engagement strategies, developing key messages, crisis communications, or social media.



#### Leadership/Teamwork

- The applicant demonstrates an ability to inspire, motivate and offer direction and leadership to others. The candidate also demonstrates an understanding of the importance of teamwork to the success of the Board. This may include an ability to recognize and value the contributions of board members, staff, and stakeholders.

#### Human Resources/Labour Relations

- The applicant has experience with, or is able to demonstrate knowledge or expertise in, strategic human resource management. This may include workforce planning, employee engagement, succession planning, organizational capacity, compensation, and professional development.

#### Government/Public Policy/Policy Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise of the broader public policy context affecting the NPCA. This may include the strategic priorities of government and the relationship between those priorities and the work of the NPCA.

#### Legal/Regulatory Experience

- The applicant has experience with, or is able to demonstrate knowledge or expertise in legal principles, processes and systems. This may include interpreting and applying legislation, experience with adjudicative or quasi-judicial hearings or tribunals, or an understanding of the legal dimensions of organizational issues.

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**Subject:** Brock University Centre for Sport Capacity Report on Sports Tourism

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, July 10, 2019

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## **Recommendations**

That report ED 7-2019 **BE RECEIVED** by the Planning and Economic Development Committee for information and that staff **BE DIRECTED** to circulate the report to tourism stakeholders for feedback and report back to the Committee.

## **Key Facts**

- In September 2018, Regional Council approved Brock University Centre for Sport Capacity's project proposal to conduct research and recommend a strategy related to Sport Tourism in the Niagara Region. (CAO 20-2018)
- The final report 'Towards a "Made in Niagara" Sport Tourism Model: The Case for a Sport Event Office' is now complete and is attached as an appendix.
- The purpose of the report is to inform decision-makers as they consider implications for the appropriate role of the Niagara Region in relation to sport tourism, the development of facility and organizational capacity, and the creation of partnerships and networks.
- There are existing tourism organizations in Niagara that may consider taking on the role of the sport tourism office.
- The recommendations in the report are outside the current mandate of Niagara Region and would have budget and resource implications.

## **Financial Considerations**

There are no financial considerations associated with this report at present.

The recommendations in the "Towards a Made in Niagara Sport Tourism Model: The Case for a Sports Event Office" report are outside the current mandate of Niagara Region and would have budget and resource implications. Any costs associated with adopting any of the recommendations in the report and / or tourism stakeholder feedback would be considered as part of future budget deliberations.

The potential future financial implications of this report should be considered along with the following budget items, as highlighted in the 2019 budget report (CSD 22-2019 Revised), which may be brought forward for committee's consideration during 2019 for referral to the 2020 budget process.

	Levy Amount	Levy Impact %
Suicide Prevention Initiative PHD 8-2019	200,000	0.05%
Niagara Airports CAO 04-2019	2,240,000	0.61%
Long-Term Care Home Redevelopment capital funding COM 32-2019	5,899,355	1.62%
Waterfront Investment Program – Base funding	1,000,000	0.27%
Smarter Niagara Incentive Program – Base funding	600,000	0.16%
Brock LINC request for funding	1,500,000	0.41%
Niagara Regional Transit - phase in cost	6,213,050	1.70%
NRPS 2019 position hiring deferral	705,996	0.19%
EMS Central Hub capital funding	390,064	0.11%
<b>Total new initiatives</b>	<b>18,748,465</b>	<b>5.12%</b>

## Analysis

Sport Tourism is defined in this report, as sporting events that attract people from outside the community, whether for a few hours or a few days. Sport Tourism is a sub-sector of the tourism industry (Industry Canada, 2015).

In the past, Niagara Region has recognized the importance of sport events in the community and the economic impact on the economy, by providing funding to the Niagara Sport Commission (NSC) to advance the delivery of the Pan Am games and assist with the bid development for the 2020 Canada Summer Games. Niagara Region has also provided financial support through the Economic Development budget for the 2020 Bid for the Brier (Men's Curling Championship).

The NSC ceased operations in late 2017 and there is currently limited institutional capacity at a regional level to promote Niagara as a sport event host. The NSC was established in 2009 with funding from the Ontario Trillium Foundation as a non-profit entity with its own board of directors.

The conclusions in this report are drawn from two analyses. First, an environmental scan reviewed nine municipalities to establish a cross-section of best practices. Second, 64 Niagara stakeholders from 48 organizations were consulted through interviews and focus groups, including representatives from the public, non-profit and commercial sectors.

*Theme 1: Sport tourism is an important contributor to the Niagara economy.  
Report Recommendation #1: The Niagara Region recognizes sport tourism as a key component of future economic initiatives.*



In February 2018, the Niagara Community Observatory at Brock University published a policy brief outlining the economic impact of sporting events in Niagara. It demonstrated that a local event such as the Niagara Winter Games in 2015 with 750 participants had an impact of \$125,748 in the region. However, a larger event such as the Royal Canadian Henley Regatta in 2015 that brought people from outside the region had a \$2.8 million economic impact. The 2017 Scotties Tournament of Hearts with a national audience had an economic impact of \$6.8 million (Charlebois and Stevens, Brock University, 2018).

Niagara Economic Development recognizes the significance of sport tourism. In 2019, the department released the “Niagara Tourism Profile”. It identified the economic impact of tourism in Niagara. In that report, it was noted that in 2017, some 259,000 sport tourists came to Niagara and spent over \$45 million (Niagara Tourism Profile, Niagara Economic Development, 2019).

*Theme 2: Niagara needs a central, region-wide sport event office.*

*Report Recommendation #2: An arm’s length sport event office be established.*

In the comparative municipalities looked at in the report, most sport tourism offices were located under the municipality’s Destination Marketing Organization (DMO), which markets a specific geography as a tourism destination. In Niagara there is not one regional DMO. There are five local DMOs, (Niagara Falls Tourism, Niagara-on-the-Lake Tourism, St. Catharines Tourism, Twenty Valley Tourism, and the South Coast Tourism Association) who work to develop tourism at a sub-regional level and have a seat on the board of the Tourism Partnership of Niagara (TPN). The TPN is a provincially designated and funded Regional Tourism Organization established in 2010 to be responsible for tourism development across Niagara.

In the case studies, the accountability of the sport tourism offices fell into three categories: direct accountability to the municipality; in-direct accountability as an arm’s length office and accountability to Council through an annual report and/or representation on its Board; a separate, private not-for-profit organization.

There is no conclusion in the report that addresses whether a tourism organization exists that would be best suited for this “made-in-Niagara” approach, or whether a new organization should be created solely for this purpose.

*Theme 3: A sport event office requires sustained operational and bid funding.*

*Report Recommendation #3: The Niagara Region provide stable long-term operational funding for a sport event office.*

*Report Recommendation #4: The Niagara Region provide stable, long-term funding for a sport event bid fund.*

Funding sources for the sport tourism offices in the study vary. Local government does contribute to their operational budgets, either directly from Regional funding or by utilizing the municipal accommodation tax (MAT). In some municipalities, this is done in combination with other sources, for example, a destination marketing fund (DMF), sponsorship, membership fees, event management or stakeholder contributions. The budget allocated directly to the sports tourism offices studies ranges from \$100,000 - \$400,000 which for most offices included salaries and a dedicated 'bid' fund or 'event grant'.

Currently, no regional bid fund exists to support sport organizations or venues in pursuing bids for future events. Any support to these bids to date has provided has been as a result of an approved request directly from the sport organization/bid committee to Council.

*Theme 4: A sport event office should offer high-level (strategic) as well as low-level (tactical) services.*

*Report Recommendation #5: The sport event office develop a 'diverse portfolio' strategy for sport event bidding and hosting, aiming to attract events ranging from small-scale to large-scale.*

*Report Recommendation #6: The sport event office offer event bidding and evaluation services.*

The report recommends that the initial focus of the sport event office should be on the attraction of sporting events to the Niagara region. Ultimately, it is suggested that the services offered could include bid development and submission, a facility inventory, sport tourism impact evaluation and grant writing assistance.

The environmental scan showed the diversity of sporting events that municipalities can host. Existing, as well as new, sport events should be considered, with a focus on events that fit the existing infrastructure in the region. The recommendation is that a portfolio approach should be considered, including small, medium and large-scale events.

The variety of services offered would ultimately be decided by the organization created for this, or the organization that houses this for Niagara and would be subject their governing body's approval.

## **Alternatives Reviewed**

The alternative reviewed is for Niagara Region not to take an active role in sport tourism. In this instance, coordination and funding of bid opportunities for sporting events could be left to the venue staff, local area municipalities and their staff, and/or RTO/DMOs.

## **Other Pertinent Reports**

CAO 20-2018 Brock University Centre for Sport Capacity Project Proposal on Sport Tourism

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**Prepared by:**

Valerie Kuhns  
Acting Director  
Economic Development

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**Submitted by:**

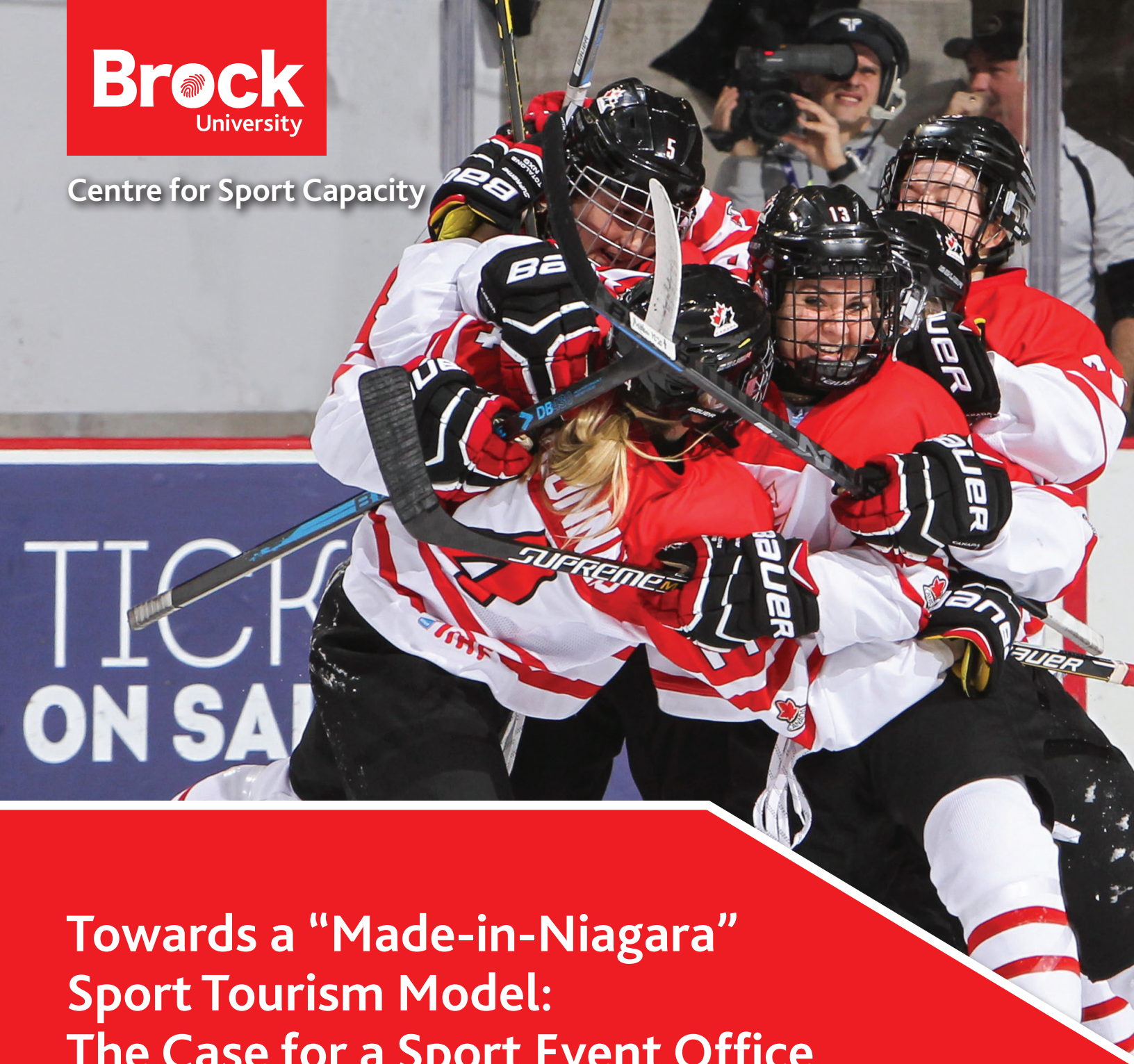
Ron Tripp, P.Eng  
Acting Chief Administrative Officer

*This report was prepared in consultation with and reviewed by Kelly Provost.*

## **Appendices**

Appendix 1            Towards a “Made in Niagara” Sport Tourism Model: The Case for a Sport Event Office, Julie Stevens, Ph.D., Centre for Sport Capacity, Brock University.





# Towards a “Made-in-Niagara” Sport Tourism Model: The Case for a Sport Event Office

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July 2019

SUBMITTED BY: Julie Stevens, Ph.D.  
Centre for Sport Capacity, Brock University

SUBMITTED TO: Planning and Economic Development Committee  
Regional Municipality of Niagara

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Photo Credit - Anthony Gallacio



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# EXECUTIVE SUMMARY

In 2017 there were 259,000 sport tourists who came to Niagara and spent over \$45 million (Niagara Tourism Profile, 2019). These numbers are significant, yet there is currently limited capacity to promote Niagara as a sport event host. **Given this, the purpose of this report is to provide Niagara Region council and staff with the information they need to make evidence-based decisions about building a Niagara sport tourism model for the future.**

For this report, sport tourism is defined as sport events that attract people from outside the community, whether for a few hours or a few days. Conclusions were drawn from two analyses. First, an environmental scan reviewed nine municipalities to establish a cross-section of best practices. Second, 64 Niagara stakeholders from 48 organizations were consulted through interviews and focus groups; spanning public, non-profit and commercial sectors who connect with sport tourism in some way.

The findings indicate support for a 'Made-in-Niagara' sport tourism model. Additional details regarding key themes and recommendations include:

- |                           |  |
|---------------------------|--|
| <b>Theme 1:</b>           | Sport tourism is an important contributor to the Niagara economy.  |
| <b>Recommendation #1:</b> | The Niagara Region recognizes sport tourism as a key component of future economic development initiatives.   |
| <b>Theme 2:</b>           | Niagara needs a central, region-wide sport event office.   |
| <b>Recommendation #2:</b> | An arm's-length sport event office be established.   |
| <b>Theme 3:</b>           | A sport event office requires sustained operational and bid funding.   |
| <b>Recommendation #3:</b> | The Niagara Region provide stable long-term operational funding for a sport event office.  |
| <b>Recommendation #4:</b> | The Niagara Region provide stable, long-term funding for a sport event bid fund.   |
| <b>Theme 4:</b>           | A sport event office should offer high-level (strategic) as well as low-level (tactical) services.   |
| <b>Recommendation #5:</b> | The sport event office develop a 'diverse portfolio' strategy for sport event bidding and hosting, aiming to attract events ranging from small-scale to large-scale. |
| <b>Recommendation #6:</b> | The sport event office offer event bidding and evaluation services.  |



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# INTRODUCTION

Hosting sport events has long been tied to efforts of economic development and rejuvenation in North American cities, and the case is no different in Niagara. As a community hosts large international sport events such as the Royal Canadian Henley Regatta, the Lightning North American Sailing Championship, the Pan American Games, World Dragonboat Championships, IIHF Ice Hockey Women's U18 World Championships and FIBA U18 Americas Basketball Championships (all on Niagara's resume), the focus is not only on infrastructure investments, increased hotel room nights, and busy restaurants. Economic developers also seek to capture the attention of the delegations – the consul generals, the business sponsors and partners of the participating countries – to showcase the community's investment potential. It is also believed that the larger and more successful the event, the higher the profile of the hosting city in terms of establishing a brand.

The Canadian Sport Tourism Alliance (CSTA) reports that sport tourism accounts for approximately \$6.8 billion of economic spending as a direct result of sport events and conferences that range in scale from the community level sport tournament to large international multi-sport "mega-events" such as the Olympics, Commonwealth Games, and Pan American Games. While large-scale events often garner the most attention, consider the case of Thorold minor hockey. The local sport association hosts 100 teams, each comprised of 10-16 families, in various tournaments over its season. This brings in over 1,000 families from out of town who need hotel rooms for two nights, places to eat, and activities between games. This economic value should not be under-estimated. Clearly, any size and type of sport event can be an effective economic development tool.

Niagara is a world destination and tourism is a pillar of its economy, comprising many sectors including food and accommodation, transportation, culture and sport. For the purpose of this report, sport tourism is defined as sport events that attract people from outside the community, whether for a few hours or a few days. Niagara Region has recognized the importance of sport events in the community and the economy but, despite past successes, currently has limited institutional capacity to promote Niagara as a sport event host. To that end, Regional Council has commissioned the Centre for Sport Capacity at Brock University to investigate best practices in the industry as well as to gauge the needs and vision of local stakeholders from both sport and tourism.

Given this, the purpose of this report is to provide Regional Council and staff with the information they need to make evidence-based decisions about a Niagara sport tourism model for the future.



Photo Credit - Vaughn Ridley



# OVERVIEW OF THE REPORT

This report provides an overview of how Canadian municipalities have structured their sport tourism offices in an effort to build a successful sport tourism sector. It discusses the needs, challenges, and opportunities expressed by Niagara stakeholders from government, tourism, business, and sport. First, the context within which this project was launched is outlined: the history of the now-defunct Niagara Sport Commission, the economic impact of specific sport events hosted by Niagara in recent years, and the economic contributions of the sport sector in Niagara.

Second, an environmental scan compares, among other things, the staffing, funding, and oversight of sport tourism offices within successful sport cities. Through this scan, the types of governance models used for sport tourism offices are categorized, which should give Niagara decision-makers a clearer idea of the paths available to them. Third, this report summarizes and analyzes the findings of focus group discussions and interviews with Niagara stakeholders. In conclusion, key themes and recommendations are laid out.

## Methodology

Research for this report included:

- Document research on the sport economy and sport event hosting in Niagara;
- An environmental scan of sport tourism models in comparable municipalities using websites and interviews;
- Stakeholder consultations across public, non-profit and private sectors

## Case Selection for the Environmental Scan of Sport Tourism Models

The environmental scan reviewed nine municipalities to establish a cross-section of best practices (see Table 1). The scan included the top-four mid-size municipalities (population 150k to 500k), as ranked by the 2019 Global Sport Impact (GSI) Canada Index (Saskatoon, Sask.; Richmond, B.C.; Regina, Sask.; Kingston, Ont.), as well as Niagara’s neighbours (Hamilton, Buffalo, and Toronto), and communities with an established reputation in sport tourism that are comparable with Niagara across demographic and economic factors (London, Ont.; Durham Region, Ont.). A review of websites for relevant information was followed by interviews with the sport tourism lead-person in the municipality.



Table 1 – Summary of Municipalities for Environmental Scan

NAME	TYPE OF MUNICIPALITY	POPULATION	GLOBAL SPORT IMPACT (GSI) CANADA INDEX
Saskatoon Sports Tourism	Single Tier	295,095	Mid-Size 1st
Richmond Sport Hosting	Area Municipality	198,309	Mid-Size: 2nd
Events Regina	Single Tier	236,481	Mid-Size: 3rd
Sport Tourism Office, Kingston	Single Tier	161,175	Mid-Size: 4th
Business Events Toronto	Single Tier	Pop. 4.05 million (incl. Mississauga & Brampton)	500k+: 4th
Sport Tourism Office, Hamilton	Single Tier	536,917	500k+: 8th
Sport Tourism, London	Single Tier	494,069	Mid-Size: 15th
Sport Durham	Regional Government	645,862	Mid-Size: 17th (Oshawa)
Buffalo-Niagara Sports Commission	Multi-Jurisdictional	1.1 million	n/a

Note: All populations are Census Metropolitan Areas except for Toronto, Richmond and Hamilton which are city population. For comparison, Niagara Region is a regional government with a population of 447,888 (2016 Census), and a 2019 GSI Canada Index ranking of Mid-Size:13th and 36th overall in Canada.

## Stakeholder Sample

Key Niagara stakeholders across public, non-profit and commercial sectors who connect with sport tourism (particularly sport event hosting) were invited to participate in an interview or focus group. Discussions were held from January to April 2019.

A total of 64 individuals provided input. There were 39 people interviewed and an additional 25 people in focus group sessions. Participants represented 48 organizations that spanned tourism, economic development, businesses, business associations, major venues, parks and recreation, education, and community sport clubs.

Interviews were recorded, and transcriptions and notes were generated. The analysis identified key themes to inform recommendations.

## PART 1

# THE NIAGARA SPORT LANDSCAPE

## Sport and sport tourism as an economic driver in Niagara

Sport is a sector of the tourism industry (Industry Canada, 2015). In 2017, some 259,000 sport tourists came to Niagara and spent over \$45 million (Niagara Tourism Profile, 2019). Two-thirds of these visitors attended a sport event as a spectator and one-third came to play an individual or team sport.

At a local level, an impact study on sport events held in Niagara was published by the Niagara Community Observatory and Centre for Sport Capacity at Brock University in February 2018, demonstrating, for example, that a local annual event such as the 2015 Niagara Winter Games with 750 local participants could have an impact of \$125,748 on the region. Meanwhile, a larger annual event such as the Royal Canadian Henley Regatta that brought people from outside the region had a \$2.8 million economic

impact in 2015. The 2017 Scotties Tournament of Hearts, with a national audience, had a \$6.8 million economic impact (Charlebois and Stevens, 2018).

The 2019 Global Sport Impact (GSI) Canada Index ranks Niagara Region 13th in the mid-size category (pop. 150k-500k) and 36th overall in the country. Rankings are awarded based on the number and success of national and international sport events hosted by towns and cities the previous year as well as those that have been awarded in upcoming years. Niagara’s placement is most likely based upon the strength of the 2018 FIBA championships, winning the 2021 Canada Summer Games bid, the success of the 2018 World Dragonboat Championships in Welland and the annual Royal Canadian Henley Regatta. More broadly, the 2019 Global Sports Impact (GSI) Nations Index ranks Canada 6th out of 90 countries in sport hosting.

The sport and recreation industry is also an employer creating 3,502 Niagara-based jobs in 2018 (see Table 2). The location quotient (LQ), which indicates the concentration of jobs in an area, was 2.5 in spectator sports. A LQ higher than 1.5 indicates some level of specialization in that industry (see Niagara Tourism Profile, Glossary). This means Niagara holds a competitive advantage in this job area compared to the rest of Ontario.

Table 2 - Niagara Sport-Related Jobs by Industry (Niagara Tourism Profile, 2019)

NAICS	INDUSTRY	2011	2018	CHANGE	% CHANGE	LQ
7112	Spectator sports	593	546	-47	-7.9	2.5
7113	Promoters (presenters) of performing arts, sports and similar events	209	305	96	45.9	0.97
7139	Other amusement and recreation industries*	1,878	2,651	773	41.2	1.21

Note: NAICS 7139 includes marinas, golf courses, bowling alleys and ski hills as well as fitness centres.



## Sport event hosting in Niagara

The next big sporting event on Niagara’s calendar is the Canada Summer Games (CSG) from August 6-21, 2021. More than 5,000 athletes and coaches will participate in 18 sports, requiring thousands of volunteers and attracting upwards of 30,000 spectators over the two weeks. New facilities will be built, and others will be upgraded. The events are spread across all 12 municipalities and the economic impact has been estimated at \$200 million (Niagara 2021 Bid Document). Niagara won the right to host the Games with a bid that beat out Ottawa, Sudbury, and Kitchener-Waterloo-Cambridge. The bid, led by the Niagara Sport Commission (NSC) (see Table 3 summary), has been touted by stakeholders as having been successful because Niagara was able to unite and speak with one voice.

The 2021 CSG was awarded to Niagara in March 2017, and in November of that year, the NSC filed for bankruptcy. The NSC was established in 2009 with funding from the Ontario Trillium Foundation. It was a non-profit entity with its own board of directors. Along with the Games win, its highest-profile achievements to that point included partnering with the Ontario Women’s Hockey Association to bring the 2016 IIHF Ice Hockey U18 Women’s World Championships to Niagara and partnering with Canada Basketball to win the bid to host the men’s U18 FIBA tournament in June 2018.

By 2017, the NSC ran out of money. With no stable source of funding, it had relied on event management fees from local events such as the Royal Canadian Henley Regatta; sponsorships, website advertising, and public-sector grants for specific projects and programs. It was essentially being paid on a project-by-project basis.

For example, in 2011 it signed a MOU with the Regional Municipality of Niagara that paid \$70,000 per year in the lead up to the T.O. Pan/Parapan American Games (2011-15). However, the funds were for specific PanAm related services such as volunteer management and training, a marketing strategy, and a facilities inventory. In all, the NSC received a total of \$560,000 from the Region between 2011 and 2017 for its Pan Am work as well as monies for the 2021 Canada Summer Games bid preparation. No operational funding was given.

The NSC’s closure left a void in Niagara’s sport tourism sector. There was no longer a central office to seek, find and bid on the abundance of events available in the lucrative Canadian sports tourism market despite the region’s comparative advantage in tourism infrastructure, specifically accommodations, and in sport facilities.

**This void matters because sport tourism is a multi-million-dollar contributor to Niagara’s economy.**



Photo Credit - Hockey Canada

Table 3 - Niagara Sport Commission in Niagara

<b>STRUCTURE</b>	MOU with Niagara Region for fee-for-service; NSC work for the Niagara Region from 2011-2015 required an annual report during this time period.
<b>GOVERNMENT ACCOUNTABILITY</b>	No municipal representation – elected councillors sat on the NSC board but officially represented neither the Regional Municipality of Niagara, nor an area municipality.
<b>STAFFING</b>	As of 2017: 3 FTE, 2 x 0.5 FTE
<b>BUDGET</b>	Not available
<b>FUNDING SOURCES</b>	Fee-for-service, grants, advertising
<b>SERVICES</b>	Sport event hosting and community development - event bidding, event management, marketing, community relations; sport development, advocacy.
<b>MISSION STATEMENT</b>	“To enhance the economic, social and personal health of Niagara residents through sport and physical activity. It is the Niagara Sport Commission’s interest to utilize sport as a means for economic and community development by advocating communication and cooperation within our community, facilitating events and by providing leadership and educational opportunities.”
<b>EVENTS</b>	2015 Pan/Parapan American Games (rowing and flatwater events); 2016 IIHF Ice Hockey U18 Women’s World Championships; U18 FIBA tournament; 2021 Canada Summer Games (bid submission); regular event management for the Royal Henley Rowing Regatta

## PART 2

# ENVIRONMENTAL SCAN OF MUNICIPAL SPORT TOURISM OFFICES

## What are other municipalities doing?

In order to determine what other municipalities in Canada were doing in terms of sport tourism, an environmental scan of nine municipal models was conducted.

This report specifically sought to answer how these local governments have structured a sport tourism

office, how much money is being invested, and what services are offered. The sport tourism websites of each of the case studies were reviewed for information. Annual reports and strategic plans were collected, where available. A follow up via a phone call to the appropriate staff was completed. The information for each case in the environmental scan is organized into tables for easier review, categorized as follows:

- Structure (Who runs the sport tourism office?);
- Municipal Oversight and Accountability;
- Services;
- Municipal Accommodations Tax or Equivalent;
- Funding, Staffing and Budget;
- Events Hosted

The goal in such an environmental scan is to provide Niagara with ideas for a successful sport tourism model.

## Findings

In regard to the **structure of sport tourism offices**, Table 4 shows that in the vast majority of instances (Richmond, B.C. is the exception), the sport tourism office is located under the municipality's official Destination Marketing Organization (DMO), which markets a specific geographical area as a tourism destination. This is even true for Buffalo-Niagara, which has a sport commission with a separate board of directors, though it is part of the DMO Visit Buffalo Niagara (VBN). In comparison, the Sport Hosting Office in Richmond is a partner of Tourism Richmond and Richmond Oval Corp.

**Table 4 - Structure (Who runs the sport tourism office?)**

NAME/RANK	STRUCTURE - WHO RUNS IT?
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	Tourism Saskatoon (DMO)
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	City of Richmond
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	Economic Development Regina (an agency); EDR oversees Tourism Regina (the DMO) which runs the Events Regina office
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	Tourism Kingston (DMO)
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Tourism Toronto (DMO/RTO)
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	City of Hamilton (DMO) through tourism and culture division.
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	Tourism London (DMO)
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Durham Region (DMO) through Durham Tourism offices of Planning & Economic Development
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	Visit Buffalo Niagara (DMO)



However, as shown in the Table 5 review of municipal oversight and accountability there are differences in how those DMOs are structured in relation to their respective municipalities, and thus the relationship of the sport tourism office to the municipality also varies. For clarity, the scan results break down the **accountability of the sport tourism office** into three categories.

1. DIRECT accountability - Operated and/or staffed by the municipality;
2. INDIRECT accountability - An arm’s-length property with accountability to council through an annual report and/or representation on its board;
3. SEPARATE - A private, not-for-profit organization.

Overall the scan reveals a range of types - four indirect, one hybrid/indirect, three direct, and one separate. Among the cases, Toronto is unique as the only example of a “separate” model, while the number of municipalities using direct and indirect accountability models are fairly equal.

At this point it is worth visiting the current structure of Niagara’s tourism sector. There are five DMOs operating in Niagara. St. Catharines Tourism is run out of the City of St. Catharines economic development

department (direct accountability, according to the categories indicated above). Twenty Valley Tourism Association is Lincoln’s DMO and is an arm’s-length agency with its own board of directors, but receiving town funding; likewise, Niagara Falls Tourism and the City of Niagara Falls (indirect). Niagara-on-the-Lake Tourism is run out of the town’s Chamber of Commerce (separate). Niagara’s South Coast Tourism Association is the official DMO of several south Niagara towns and has been described as being in a re-build.

The DMOs develop tourism at a sub-regional level and they all have a seat on the board of the Tourism Partnership of Niagara (TPN). The TPN is a provincially designated Regional Tourism Organization responsible for tourism development across all of Niagara. Ontario has 13 such RTOs, “independent, not-for-profit organizations led by the tourism sector” (Ministry of Tourism, Culture, and Sport website, 2019) which receive direct funding from the province. The latest publicly available data showed the Niagara RTO received \$3.9 million from the province in 2016-17.



Photo Credit - Buffalo Canoe Club

Table 5 – Municipal Oversight and Accountability

NAME/RANK	TYPE	OVERSIGHT AND ACCOUNTABILITY
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	Indirect	A not-for-profit; Board of Directors includes city recreation and sport manager, and a SaskSport representative (province); reports to Tourism Saskatoon (TS), which has two city councillors on TS Board of Directors and submits an annual report to the city.
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	Direct	The city owns and directs the office. RSH is a partnership between the city, Tourism Richmond and the Richmond Oval; offices are in the Oval.
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	Indirect	Housed under Tourism Regina, which answers to Economic Development Regina (EDR), a not-for-profit agency of the city; EDR Board of Directors includes mayor; submits an annual report.
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	Indirect	A not-for-profit; Board of Directors include mayor and one councillor; reports to city annually.
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Separate	Operates as a private not-for-profit.
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	Direct	Tourism is within the city’s economic development department.
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	Hybrid/Indirect	Tourism London is an arm’s-length business unit operating under the City of London (described as “paramunicipal office”); Board of Directors includes two city councillors.
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Direct	Durham Region (DMO) through Durham Tourism offices of Planning & Economic Development
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	Indirect	Within Visit Buffalo-Niagara; VBN has a Board of Directors with five county appointees and submits an annual report to Erie County; VBN must apply for its funding every year.

Table 6 highlights **services offered by sport tourism offices**. In several cases, these offices will market themselves as “one-stop shopping” for groups looking to hold events in that city. The most common service is sport event bid development, assistance, and support. Supplemental services included promotion and accommodation assistance and volunteer management. Some websites offered event calendars and interactive maps of facilities and venues.

**Table 6 – Services**

NAME/RANK	SERVICES OFFERED
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	Bid assistance, hotel/venue selection, event publicity/marketing, sport event calendar, workshops, grant-writing assistance; connection to local sport organizations.
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	Support sport organizations and organizing committees in developing bids and presentations, recruit volunteers; organize professional site visits; direct assistance to event organizers, Sport Hosting Incentive Grant helps fund local bids (over 220 events since 2010).
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	Bid assistance, event attraction.
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	Help plan and organize events, bid development, accommodations, venues coordination, marketing.
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Find accommodations/venues, bid assistance, site inspections, some funding grants in overall Tourism Toronto budget with internal eligibility policies.
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	Incentive funding for not-for-profit organizations, bid assistance, sport facilities/accommodations assistance.
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	Bid development, accommodation and venue coordination, event marketing, city logistics, food services, transportation coordination, volunteer recruitment.
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Accommodation/venue coordination, event promotion, transportation and catering assistance.
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	Event and bid management; site selection; accommodation coordination, volunteer recruitment, transportation referrals.



Table 7 summarizes the **use of a municipal accommodation tax (MAT) or equivalent** in the case studies. The relevance of this question is to determine the hotel tax role in funding tourism and sport tourism. The name of the tax varies: municipal accommodation tax (MAT - Kingston, Toronto), municipal regional district tax (MRDT - Richmond), destination marketing fee (DMF - Regina), destination marketing program (DMP - Saskatoon, Hamilton).

For example, the funding for Richmond, Regina, and Buffalo all comes from the tax. The municipal portion of funding for Business Events Toronto comes from its MAT. London and Kingston receive money both from the city budget and from the MAT. Hamilton's voluntary "destination marketing program" goes to a bid fund administered by a hotel committee (and other partners). Saskatoon receives 75 per cent of its funding from the DMP to be used exclusively on "sales initiatives" such as event support, marketing, and site visits.

**Table 7 – Municipal Accommodation Tax (MAT) or Equivalent**

NAME/RANK	MAT/DMF OR EQUIVALENT
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	Y (voluntary DMP 3%)
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	Y (MRDT 3%)
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	Y (voluntary DMF 3%)
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	Y (MAT 4%)
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Y (MAT 5%)
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	Y (voluntary DMP 3%)
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	Y (4%)
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	N
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	Y (1.3%)

For **funding sources of sport tourism offices**, Table 8 indicates that local government does contribute to the operational budget. In some cases, this is done in combination with other sources such as sponsorship, membership fees, and contributions from other stakeholders, such as universities, casinos and hotel associations.

The **staffing of sport tourism offices** appears to be sparse across the board with one to two staffers but receives administrative and services support from the rest of the tourism agency (or municipal economic development office, depending on the model). For example, once a sport event is booked, the tourism office’s client services will take over providing tour information, swag bags, etc.

Table 8 also shows the **budget allocated directly to sport tourism offices**. This ranges from \$100,000 to \$400,000. Some of these budgets, where indicated, include salary and were not broken down for privacy reasons. Several include a type of dedicated “bid fund” or “event grant”. The awarding of these grants can vary – in some cases there is a committee that reviews requests at regular intervals of the year; in other cases, it is an internal process with specific eligibility requirements including the number of bed nights filled.

If a bid fund or event grant does not appear in this table, that does not necessarily mean one doesn’t exist, but that it is administered separately from the sport tourism office. For example, the City of Regina has a hosting grant it administers and awards separately from the sport tourism office. The grants range from a maximum of \$2,000 for a provincial event to \$10,000 for an international event. There is an online application and seven deadline dates during the year. Hamilton’s voluntary three-per-cent DMP tax sits in a bid fund administered by a committee of hoteliers and related businesses. It also has an “incentive fund” (whose value was not disclosed) which is managed internally by the tourism department, granting up to \$1,000 for sport groups based on bed nights and other requirements.

Business Events Toronto has an internal fund with eligibility policies, separate from the City of Toronto which has a hosting grant and application process. Richmond’s \$100,000 sport hosting grant, as another example, is overseen by a grant committee (which includes the chair of its advisory sports council). The committee does three to four intakes per year and looks at the economic impact of an event such as room nights, its scale, and ability to leave legacy. In Buffalo, its \$100,000 bid fund comes from a legacy fund established after the 2010 Empire State Games. Groups must apply to access funds and it is replenished with profits earned from any events that the sports commission runs.

These approaches to establishing bid funds have a few things in common: they are replenished on a regular basis, there is a consistent award process and oversight committee.



Photo Credit - Vaughn Ridley

Table 8 – Funding, Staffing, and Budget

NAME/RANK	FUNDING	STAFFING	BUDGET
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	"Investing Partners": City of Saskatoon, USask, Tourism Saskatoon, SaskSport, SaskTel Centre, Prairieland Park, Dakota Dunes Casino pay admin costs; 75 per cent of funding from DMP via hotel assoc. to be used for "sales initiatives" (event support, marketing, site visits, etc.)	1.5 - 1 FT sport and event Sales Executive, plus one Consultant; DMO employee	\$400,000 incl. salaries/contracts and \$150,000 "event development and sport fund"
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	MRDT (via Tourism Richmond)	2 – Manager and Coordinator; city employees	\$400,000, includes salaries & \$100,000 sport hosting grant
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	DMF	1 – Manager; DMO employee	\$150,000 plus salaries
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	City, Kingston Accommodation Partners (MAT); sponsorships/partnerships	1 – Sport Tourism Development Manager; DMO employee	\$200,000 plus salary (incl. grants from bidding/ event sponsorships)
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Province, GTHA (MAT), memberships/partnerships	1 – Account Director, Sports (one of 18 account directors); DMO employee	\$200,000 plus salary
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	City	1 – Tourism Product Development Specialist, Sport Tourism; city employee	Tourism Hamilton overall budget \$1 million; sport tourism not separated
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	City, MAT, memberships/fee-based programming	2 – Director of Sport Tourism and assistant; city employees seconded to DMO	\$300,000 incl. salaries
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Region	1 – sport tourism Coordinator; Region employee	\$140,000 for programming incl. \$90,000 bid fund (new, eligibility rules still being worked out)
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	Erie County thru accommodation tax	3 – Director of Sport Dev, Director of Sport Sales, Sport Services Manager; DMO employees	VBN overall budget is \$4.2 million (sport commission is not separated). BNSC has \$40,000 specifically allocated for trade shows, can draw from a \$100,000 legacy fund for bids



Table 9 includes the most recent **events hosted**, of higher profile, as well as (if available) upcoming events. Over the years, the largest events that our case studies have hosted include events for the 2010 Winter Olympics (Richmond), the 2015 Pan American Games (Hamilton, Toronto), and the Canada Summer Games (London, Regina). Durham’s main focus has been on provincial-level events. The top-four mid-size cities on our list, that finished 1-2-3-4 in the 2019 Global Sport Impact (GSI) Canada Index, hosted

events in the provincial to national range, the highest profile arguably being Regina’s hosting of next season’s 2019 NHL Heritage Classic between the Calgary Flames and Winnipeg Jets. The repertoire of events across the cases ranges from provincial to national to international levels. They include multi-sport and single-sport events from amateur (including school and university/college championships) to professional.

**Table 9 – Events Hosted**

NAME/RANK	EVENTS HOSTED
<b>Saskatoon Sports Tourism</b> Pop. 295,095 GSI Rank Mid-Size: 1st	2021 Olympic Curling Trials; 2019 Pinty’s Grand Slam of Curling finals; 2019 Men’s Canadian Softball Championships U14, U16, U23; 2018 4-Nations Cup women’s hockey tournament; FIBA 3X3 basketball tournament
<b>Richmond Sport Hosting</b> Pop. 198,309 GSI Rank Mid-Size: 2nd	2019 Canada Open Karate Championships; 2018 & 2019 Canada Open International Taekwondo Championships; 2018 - Canadian Sledgehockey Championships, Canada & China national men’s teams training camps; Canadian Gymnaestrada (gymnastics festival); Volleyball Canada Cup; numerous regional and provincial competitions; International Bantam Midget Hockey Tournament (annual)
<b>Events Regina</b> Pop. 236,481 GSI Rank Mid-Size: 3rd	2019 NHL Heritage Classic; 2019 Canadian Sprint Canoe Kayak Championships; 2018 Memorial Cup; 2018 Canadian Lawn Bowling Championships
<b>Sport Tourism Office, Kingston</b> Pop. 295,095 GSI Rank Mid-Size: 4th	2020 - Tim Hortons Brier men’s curling championship; USPORTS Women’s Rugby Championships; USPORTS national cross-country championships (also 2019); Broomball World Championships; 2019 –Canadian Pickleball Championships; 1,000 Islands Gran Fondo cycling festival; numerous North American and International sailing regattas; provincial and local level events
<b>Business Events Toronto</b> Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	2018 NBA Gatorade League, 2017 – 16 events listed, incl. IIHF World Juniors, Invictus Games, World Ringette Championships, USports Women’s Volleyball Championships, Optimist North American Sailing Regatta
<b>Sport Tourism Office, Hamilton</b> Pop. 536,917 GSI Rank 500k+: 8th	2019 & 2023 PGA Canadian Open; 2018 & 2019 Quidditch Canadian National Championship; 2016 & 2018 USports Men’s Volleyball National Championship; 2016 & 2017 Vanier Cup; 2015 Pan Am soccer
<b>Sport Tourism, London</b> Pop. 494,069 GSI Rank Mid-Size: 15th	2020 & 2018 Ontario Summer Games; 2018 Canadian Tire Para Hockey Cup; 2018 World Financial Group Continental Cup (curling); numerous OFSAA championships; Ontario Basketball Association Ontario Cup (annual); 2017 CCAA Men’s Volleyball National Championships; 2016 Canadian Ringette Championships; 2015 International Police Hockey Tournament, 2014 Memorial Cup; 2014 Canadian Pacific Women’s Cup; 2013 ISU World Figure Skating
<b>Sport Durham</b> Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	2019 Ontario Parasports Games; 2019 OFSAA Girls’ AAA Rugby; 2019 Eastern Canadian Ringette Championships; 2018 Skate Canada Synchronized Skating Championships; Ontario Lacrosse Festival (annual)
<b>Buffalo-Niagara Sports Commission</b> Pop. 1.1 million GSI Rank: n/a	2019 Frozen Four NCAA men’s hockey championship; 2018 IIHF World Junior U20 hockey; 2018 & 2016 National Softball Association Girls’ World Series; 2017 NCAA Men’s Basketball Championships rounds 1 & 2; 2017 Gaelic Games

Note: This is not a definitive list but meant to give an indication of the type and scale of events being sought after and hosted. Recent events included in this table were primarily listed on the respective sport tourism office’s website.

## PART 3

# NIAGARA STAKEHOLDER INPUT

## What are Niagara’s stakeholders saying?

What follows is a summary of key themes that were identified in the input from 64 stakeholders in tourism, business, economic development, sport, and recreation, across the Niagara region between January and April 2019. Most of these discussions took place as one-on-one semi-structured interviews, either in person or over the phone. Niagara sport groups attended one of two open-invitation focus groups that were held in April 2019.

### Theme 1 - Sport tourism is an important contributor to the Niagara economy

Across the board, sport tourism was acknowledged as an important contributor to Niagara stakeholder business and for the economy as a whole. For those who said it didn’t, yet, have an impact, they added that they saw it as an opportunity, including potential job growth, that needed to be pursued.

Those who said it didn’t have an impact, generally came from communities without large spectator venues. However, they saw opportunities in taking advantage of the Niagara landscape through watersports, fishing, cycling, triathlons, and distance running throughout the escarpment. They also saw the opportunity for spillover benefits from events being held in the larger venues (Flatwater Centre, Meridian Centre, Henley rowing course) as participants and spectators sought other activities in their down time.

The obvious tourism advantages that Niagara already has – activities, food and accommodations, amenities – translate well into the attraction of the sport and corporate market as it all “helps shape the fabric of the destination”.

With that noted, many stakeholders in business, sport, and government, felt the economic impact of sport tourism, from large and small events, needed to be measured better so that its benefits could be quantified and expressed clearly to decision-makers when making a case for bid and event funding.

Directly, for example, it was noted that:

- weeklong sport events positively and significantly impact a venue’s bottom line;
- for one hotel chain, sport tourism contributes to approximately half of its business, accounting for 200 jobs;
- the Curling Canada men’s national championship (the Brier) brings an economic impact of \$15 million wherever it is held.

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*“... the most prominent corporate and convention destinations [are] also the most prominent sport and leisure destinations... So from a sport perspective, you’d want to take advantage of the same attributes ...”*

*“Those (big events), they’re hard to come by, and they’re hard to bring in, but that’s what feeds the whole city, feeds everything around here.”*

*“I think there’s a huge opportunity for us to do some really exciting things here because we already have a lot of assets in this region that people are coming to see anyways.”*

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## Theme 2 - Niagara needs a central, region-wide sport event office.

There was overwhelming support for one centralized sport event office to coordinate and communicate on behalf of all stakeholders. The office would speak for Niagara when bidding for sport events. Niagara’s 12 municipalities and five Destination Marketing Organizations were seen as problematic in establishing a sport tourism strategy as stakeholders were operating in “silos” and didn’t know what was happening in other Niagara communities. Having one strategy and vision, instead of a fragmented, ad hoc effort, is considered necessary to maximize economic spinoff and ensure local municipalities and groups aren’t competing against each other.

The region needs a “leader” and an “advocate” for sport tourism both in the community and in representing and marketing Niagara outside the community.

The lack of a sport event office means there is a “void” (a word used often) in Niagara’s sport tourism market as no one is strategically and actively marketing the whole of Niagara as a sport tourism destination and seeking to attract new large-scale sport events to the community. Details about three large bids that either had been undertaken – or are currently being put together – since the demise of the NSC were shared during the stakeholder discussions. These sport event bids are being done in isolation by the corresponding sport group, facility, and local municipality: the 2020 failed Brier bid, a bid for the 2022 International Breast Cancer Paddlers’ Commission (IBCPC) Participatory Festival in Welland, and a bid for the 2024 World Rowing Senior/Under 23/Junior Championships in St. Catharines.

A single sport event office would be advantageous particularly because so many large-scale events require the coordination of facility use across the local municipalities – from a local hockey tournament that needs three arenas (or soccer, or baseball fields) to the Canada Summer Games that will see

competition and practice venues across the region. The office could champion large municipalities and groups with existing world-class sport venues, and broker event-hosting opportunities for small municipalities and groups.

Amongst hotel stakeholders, specifically, there was a frustration that several events were being scheduled on the same weekends and that more could be done to coordinate the attraction of events during “down” times in the industry.

A single “one stop” office was seen as an information hub - a simple solution for both user groups and visitors looking for information and assistance in everything from coordinating transportation to writing grants and preparing bids (see the “Services” section for more details).

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*“So what is missing and what’s the weakness, I think, is an organization like (the NSC) again, fully funded obviously, that actually goes out and operates on behalf of all of Niagara.”*

*“There’s all kinds of opportunities that most of the municipalities here don’t bid on because it’s too overwhelming and too much work ... It doesn’t mean we don’t want these things in our community, just nobody has a dedicated sport tourism person sitting and waiting to do bids or host events.”*

*“We don’t have a one-stop shop, an organization that can actually go get new business for the future or manage and maintain the business that is here right now. That’s our weakness. We have no strategy, no vision for the future at this time.”*

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### Theme 3 – A sport event office requires sustained operational and bid funding.

There was agreement that the former Niagara Sport Commission did not succeed partially because it did not have a sustainable, guaranteed source of operational funding. However, when asked what model of office and funding should be recommended, opinions varied.

#### Structure and Operational Funding

##### 1st OPTION - Overwhelming support was given for an independent sport event office.

Terms such as "not-for-profit", "arm's-length" and "separate" were used when suggesting what type of model should be used in a new sport event office. An independent office was seen as being impartial and benefitting the entire region. It could build expertise in sport tourism and have a focused mandate of bringing new business to all of Niagara.

At this point it should be noted the previous attempt at such an entity, the NSC, failed because it didn't have sustainable operational funding. The organization was too busy looking for ways to make money and stay afloat, specifically with event management obligations. This took away from its mandate to strategize, market, seek, and bid for new sport-hosting opportunities for Niagara. There were concerns that such an office would have to be built from the ground-up, including issues of accountability and establishing credibility, and there were still heavy concerns that a separate not-for-profit entity would require substantial funding and a formula would need to be worked out.

There were several suggestions at how a new "independent" sport event office might be sustainably funded.

- Several stakeholders that felt the Region should fund the office 100 per cent but stay arm's-length and instead have the new entity be governed by a board of directors (with regional representation) and strict annual reporting guidelines;

- Sustainable operational funding (not tied to fee-for-service) would come from all interested parties: the area municipalities on a per-capita basis, the existing Destination Marketing Organizations, and the two post-secondary institutions (Brock University and Niagara College).
- Some members of the business community suggested a new separate entity could be self-sustaining with revenues from memberships, partnerships/sponsorships, website advertising, travel booking services, as well as event management services at some point down the road once the office was established.

##### 2nd OPTION - Some support was given for a sport event office run by Niagara Region.

Those who felt the Niagara Region could house a sport event office felt it was best able to represent the entire region with impartiality, and ensure the entire region benefits from sport tourism. It would hold immediate credibility with the public and the sport tourism community outside Niagara. Proponents of this model believed it was the path of least resistance as the office infrastructure was already there and the funding would be stable.

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*"I think the reality is that we need in Niagara a sport commission of some kind. Call it what you want. To my mind, it does need to be simplified in its funding process by having it funded through the Region. That way everybody has access to it, they're all paying into it."*

*"If there's not long-term support, then it's year by year, and how do you build on successes then? It takes a long time to do some of these events and some of these blockbusters. So the people in charge, the people working there have to know that they're supported for the long term, or else it'll just fail."*

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The main concern, however, was that the Regional Municipality of Niagara is already cash-strapped and this might make the new entity vulnerable to financial pressures. The fact that tourism is currently not part of the Region’s mandate also made people question whether it was the right host for the office.

**3rd OPTION - Limited support was given for a sport event office run out of the Regional Tourism Organization (currently known as the Tourism Partnership of Niagara or TPN).**

The dominant model in the environmental scan was that the sport event office was housed with the municipality’s Destination Marketing Organization. This is problematic in Niagara, which has five such DMOs. Niagara does have, however, one overarching Regional Tourism Organization – the Tourism Partnership of Niagara (TPN) which receives funding from the province and disburses monies to the DMOs. It has a board of directors with region-wide representatives, including the DMOs.

Those who supported an office with the TPN felt it already had the industry connections and the capacity to build a sport tourism office, including buy-in from operators.

The main concern about housing the sport event office in the TPN was that a special agreement or MOU would have to be put in place to ensure events and their benefits were spread across the region. It was suggested that a separate sport advisory council could be put in place to guide the focus of the office.

One oft-heard concern was that a sport event office – that engages in strategizing, marketing and bidding, as well as communication between stakeholders, and event support – may be outside the mandate of the TPN. Also, of concern was the future of RTOs under the current provincial government.

## A Bid Fund

A sport event bid fund was seen as necessary if Niagara was to seriously pursue a sport tourism strategy.

Many stakeholders agreed there should be a sustainable pool of funds available for bidding on large-scale events and that a sport event office should administer the money. A large fund, disbursed by the sport event office, would mean that user groups do not always have to approach their respective councils for financial support. The size of such a fund varied amongst stakeholders and some suggested it could be replenished as major events came in and generated revenue. “You can bid and win anything if you have enough money in your bid fund,” said one stakeholder.

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*“I think that’s the most important thing, the sustainability. That agency would have to know that it can operate without concern, that it has a funding model for years into the future.”*

*“We’re leaving events on the table. We’re not bidding on them, and largely because there’s not a major hosting event strategy.”*

*“We want to see those larger events come in, and we want to see the city or the region being able to have that purse to go out there and bid on this.”*

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**Theme 4 – A sport event office should offer high-level (strategic) as well as low-level (tactical) services.**

Services that would help sport tourism stakeholders ranged from strategizing, marketing, and evaluating to grant-writing, bid preparation, liaising between stakeholder groups, asset mapping, volunteer coordination, and a region-wide calendar of sporting events.

A sport event office was seen as a way of building capacity within the sport community, be it with user groups or the smaller towns that wish to foray into sport hosting. Capacity-building would be provided by assisting with the identification and time-consuming task of grant-writing or guiding and supporting them through a bid preparation. Volunteer coordination was a task that was also mentioned several times.

Stakeholders felt that asset mapping, or an updated facility inventory that was accessible to everyone, would be helpful. Some suggested a website that could house this database, as well as information on accommodations, food, amenities, and an upcoming events calendar.

As the local advocate for sport tourism, the office should be prepared to do economic impact analysis to support requests for bid and event support. It should compile sport event data for the region and maintain facility inventory information.

It should act as the liaison between DMOs and sport groups so that tourism offices know what events are coming and are able to prepare to support with swag and extra-curricular planning. Similarly, it should liaise between all stakeholders so that there is a good understanding of the capacity of Niagara before an event bid as well as providing for better planning for large events.

Ultimately, a sport tourism office should be seeking new business for Niagara – marketing the region as a sport destination and soliciting sport events.

Stakeholders were split on the role of a sport event office to help run events. On one hand, it was suggested that a new office might still participate in event management. However, it was also argued that the office should "focus on the big picture", provide directions and help "erase roadblocks" – then get out of the way and let the experts (in accommodations, in food, in sport logistics) do their thing.

This might be the appropriate place for a reminder that the former arm's-length Niagara Sport Commission folded because it did not have sustainable funding and was consumed with the event management side of its mandate in order to raise revenue. Overwhelming a new office's mandate with both high-level and ground-level tasks would make the initiative vulnerable from the start.

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*"I do think there is a spillover effect. I don't think we measure it. I don't think we've measured the results so I think it's a very hard one for us to say, this is the net gain that we have made out of it. But sport tourism in communities around the world it can be a big draw. But we do need to measure it."*

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*"I suspect that this agency would be responsible for going out there and finding out the agencies that are booking their events years into the future and getting Niagara on the radar of those agencies."*

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## PART 4

# RECOMMENDATIONS AND CONCLUSION

## Towards a “Made-in-Niagara” sport tourism model

### Theme 1 - Sport tourism is an important contributor to the Niagara economy

The Niagara Region needs to capitalize on the sport tourism market and the business it offers. Other municipalities are taking advantage of the economic benefits of sport tourism and aggressively pursuing opportunities. While the 2019 GSI Canada Index ranking for the Niagara Region is currently 13th in the mid-size category and 36th in the country, the demise of the Niagara Sport Commission means sport event bids are happening on an ad hoc basis through local sport groups. This unpredictable approach is a risk and the ranking – an indicator of success – may drop in future years.

A sport tourism model with a long-term outlook will ensure the growth of this sector in the region. A Niagara Region investment in physical (infrastructure) and human (capacity) resources today will get a return through sport tourism business in the future.

#### Recommendation #1:

*The Niagara Region recognize sport tourism as a key component of future economic development initiatives.*

### Theme 2 - Niagara needs a central, region-wide sport event office.

Niagara stakeholders support a region-wide centralized sport event office for better strategizing, coordination, cooperation, and a strong marketing voice. Many Niagara stakeholders also believed the Niagara Sport Commission worked really well. While the NSC made sense for the Niagara context, it failed because it did not have sustainable funding.

Thus, a similar independent sport event office would provide the coordinated, region-wide model that stakeholders want to see. At the same time, though, Niagara Region oversight of the office is required. In relation to the types of accountability noted earlier in the report, a Niagara sport event office should have indirect accountability to the Region, in the form of representation on a board of directors and annual reporting. In this way the “void” in Niagara’s sport tourism market will be filled and the value of Niagara as a sport tourism destination will be strategically and actively marketed.

#### Recommendation #2:

*An arm’s-length sport event office be established.*



Photo Credit - Denis Cahill

### Theme 3 – A sport event office requires sustained operational and bid funding

The Niagara sport event office requires sustainable operational funding, not solely based on project grants or fees-for-service. This was a key failure of the previous Niagara Sport Commission and stakeholders overwhelmingly identified stable funding as necessary in order for a new office to succeed. The sport event office must be confident it has ongoing operational support if it is to effectively pursue event-hosting opportunities over the long term as there will be losses along the way. Resource scarcity handicaps any effort to build and execute a sport tourism strategy in the region.

The Niagara Region is best suited to provide this support given the sport event office would serve the region as a whole. The majority of stakeholders felt funding should come from government. Those who felt it should come from the Niagara Region believed it would be more equitable and representative of region-wide interests including those of the smaller communities. It is therefore very important that the sport event office has a reporting relationship to the Niagara Region. This involves various mechanisms, such as municipal representation on a board of directors and mandated reports back to the Niagara Region.

The Niagara Region should also establish a sport event bid fund.

The fund must be ongoing rather than ad hoc and replenished on a regular (usually annual) basis. The fund would primarily focus on large-scale events and should not be confused with municipal grants that are also needed to support local sport events. Having said this, a sport event office should also have the primary responsibility to approach area municipalities and specifically request support for a particular sport event bid. This may involve one or more municipalities depending upon the nature of the event and include other major stakeholders such as post-secondary institutions and the Regional Tourism Organization.

#### Recommendation #3:

*The Niagara Region provide stable, long-term operational funding for a sport event office.*

#### Recommendation #4:

*The Niagara Region provide stable, long-term funding for a sport event bid fund.*



**Theme 4 – A sport event office should offer high-level (strategic) as well as low-level (tactical) services.**

Better communication about sport event activity and coordination of existing expertise and infrastructure among all interested stakeholders was a common theme in discussions. Sport stakeholders said they need a sport office that provides several services: bid development and submission, a facility inventory, sport tourism impact evaluation, and grant-writing assistance. It was noted that there should be cooperation and coordination to utilize the expert services already provided by stakeholders in the region such as destination marketing.

Ultimately, the initial focus of the sport event office should be on the attraction of sport events to the region. Supplemental services can be added as the office evolves.

The environmental scan showed the diversity of sporting events available for municipalities to host, from provincial championships to the Olympics, from police and fire competitions to the Quidditch nationals. There were stakeholders concerned that Niagara’s lack of a sport tourism office meant that we were losing out on opportunities to bring people to Niagara.

Research has shown that smaller events, without the infrastructure costs or the rights fees, can also have a significant economic impact without the risk. Existing, as well as new, sport events should be considered with a keen eye to attract opportunities that are appropriate and fit the existing knowledge and infrastructure in the region. To that end, a portfolio approach should be considered, much like an investment portfolio, combining large, medium, and small-scale events.

**Recommendation #5:**

*The Niagara sport event office develop a ‘diverse portfolio’ strategy for sport event bidding and hosting, aiming to attract events ranging from small-scale to large-scale.*

**Recommendation #6:**

*The Niagara sport event office offer event bidding and evaluation services.*

## CONCLUSION

The bottom line is, sport tourism stakeholders feel Niagara is losing out on business. They believe sport tourism should be a key driver in the Niagara economy. They said the region can be best heard in the marketplace when it speaks with one voice. This is the ideal time for Niagara Region to consider the development of a sport tourism plan and partnership. The upcoming 2021 Canada Summer Games means sport is in the spotlight throughout the region. The purpose of this report is to better enable decision-makers as they consider implications for the development of facility and organizational capacity, creation of partnerships and networks, and the appropriate role of the Niagara Region in relation to sport tourism.

The creation of a central, region-wide sport event office with stable operational funding positions the Niagara Region as an active partner among sport tourism stakeholders, and as a champion for economic development.

**A Niagara-wide sport event office would unite the region behind one vision and strategy, leading to a competitive “Made-in-Niagara” sport tourism model.**

### REFERENCES

- Charlebois, C. and Stevens, J. 2018. *More than Money: Leveraging the Benefits of Sport Hosting in Niagara*. Brock University.  
Industry Canada. 2015. *SME Profile: Tourism Industries in Canada*.  
Niagara Region. 2019. *Niagara Tourism Profile*.

### Helpful Resources:

- [http://www.mtc.gov.on.ca/en/regions/regions\\_q\\_a.shtml](http://www.mtc.gov.on.ca/en/regions/regions_q_a.shtml)  
[https://canadiansporttourism.com/sites/default/files/docs/gsi\\_canada\\_city\\_overall\\_ranking\\_2019\\_final\\_4.pdf](https://canadiansporttourism.com/sites/default/files/docs/gsi_canada_city_overall_ranking_2019_final_4.pdf)





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**Subject:** Q2 Economic Development Quarterly Update Report

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, July 10, 2019

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## **Recommendations**

That this report **BE RECEIVED** by the Planning and Economic Development Committee (PEDC) for information.

## **Key Facts**

- Economic Development provides quarterly updates to the PEDC. The purpose of this report is to provide the PEDC with an update on the department's activities for the second quarter (Q2) 2019.
- Economic Development activities support the Economic Development Strategy and Action Plan approved by PEDC in March 2019.
- Economic Development functional activities: Trade and Investment; Expedited Services for Business; Strategic Economic Initiatives and Strategic Marketing Initiatives, are grouped under the seven themes of the Strategy.

## **Financial Considerations**

The activities described in this report have been accommodated within the approved 2019 Economic Development Department budget.

## **Analysis**

Niagara Economic Development, in collaboration with local businesses, industry associations, community stakeholders, and post-secondary education institutions, has developed a five-year strategic action plan. The action plan is based on the extensive stakeholder engagement that was conducted throughout 2018. The success of Niagara Economic Development's Strategic Action Plan can only be achieved through meaningful partnerships and collaboration with our partners across Niagara.

Seven themes emerged from the development of the Economic Development Strategic Action Plan:

- Economic Development: Supporting Business Growth and Diversification across Niagara Region

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- Employment Land Strategy: Identifying and Creating a Provincially Significant Employment Zone
  - Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business
  - Streamline Planning Processes: Expediting Approvals Process
  - Increase Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Businesses
  - Workforce: Meeting Current and Future Talent, Professional, Skilled Trades and Labour Needs
  - Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in Global Economy

*Economic Development: Supporting Business Growth and Diversification across Niagara Region.*

Niagara Economic Development provides on-going assistance to the local municipalities to support their economic development functions. This includes: the services of the Niagara Foreign Trade Zone Manager, to engage companies in federal programs and encourage export activity; economic and business research and analysis; expedited development services and support to the local area municipalities without economic development offices on regionally significant projects.

**Economic Development Officer** (support for tourism, agriculture, succession planning and Local Area Municipalities (LAMs)).

Stakeholder meetings: 26 meetings with 26 stakeholders

- Examples include: Global Skills Strategy, Immigration, Refugees and Citizenship Canada; Super-Commuters Labour Mobility Initiative; meeting with the Ambassador of Moldova to discuss Niagara region economy; meeting with Canadian Consulate offices in Niagara border-states.

Agri-business: 15 meetings with 11 stakeholders including:

- OMAFRA Canadian Agriculture Partnership program info session and Community Economic Development 101 session.
- Agriculture presentation to Golden Horseshoe Food and Farming Alliance (GHFFA) board.
- Presentations to Niagara Region APAC on the Economic Development Strategy and the GHFFA Agri-business Asset Map.
- GHFFA project advancement: assisting with data refresh on the Agriculture Asset Map; kickoff meeting with for the Long Term Care Home local procurement project.

Tourism: 22 meetings with 14 stakeholders including:



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- RFP for Niagara's Airports' Feasibility and Future Business Modelling has been released.
  - Brock University's Sports Tourism Report – two public open houses hosted at Niagara Region offices in April for the public to contribute to the report.
  - Canada Summer Games – State of the Games forum held with 77 people attending representing all 12 municipalities.
  - Niagara District Airport meeting with Southern Ontario Airport Network through Toronto Pearson.
  - Meetings with Metrolinx and the Alcohol and Gaming Commission of Ontario to advance a pilot project special to Niagara.
  - Niagara Gateway Information Centre Q1 2019: 6519 visitors in the kiosk and more than 120 buses signing in with guests.

LAM development: 27 meetings touching eight local area municipalities:

- Four existing business site visits and four site selection inquiries/assistance requests. Work includes representation in Foreign Direct Investment consulate missions, development charge questions, business expansion assistance, Economic Development strategy planning.

Research and information requests: 73 requests from businesses and stakeholders, examples include hiring assistance programs, data requests and partnership referrals.

**Manager, Economic Research & Analysis** (support to LAMs through research undertaken, support to Niagara Economic Development investment, trade and sector activities).

Research Projects:

- National Trade Corridors Fund - Expression of Interest
- Agribusiness Policy Brief and Event (with Brock University)
- Niagara Economic Update
- Industry 4.0 Study (with Niagara College Research & Innovation)
- Niagara Industrial Supply Chain Study (with Transport Canada and McMaster Institute for Transportation & Logistics) (in progress)
- Information and Communications Technology Policy Brief (with Brock University) (in progress)
- Niagara Trade Overview (in progress)

Research Inquiries

- Total: 79
- Brock University: 4
- Niagara College: 3
- Internal (Niagara Region): 17
- Businesses: 16
- Stakeholders (ex. GNCC, NIA, Hamilton Port Authority, media, etc.): 22
- Local Area Municipalities: Total 16 (St. Catharines: 4; Grimsby: 1; Port Colborne: 1; Niagara Falls: 3; Fort Erie: 4; Lincoln: 1; Pelham: 1; NOTL: 1)

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**Niagara Foreign Trade Zone Manager** (export diversification for Niagara companies, outreach, marketing, implementation of the FTZ strategy)

The Niagara Foreign Trade Zone (NFTZ) point currently serves 78 clients. To date, in total, 180 firms and 20 institutions have been contacted from a database of 400 firms. NFTZ clients/prospects are mainly from the agribusiness, manufacturing, and logistics sectors. Customized export related services include assistance with entering into new markets, identifying specific incentives, export-related financing and risk mitigation.

#### NFTZ Strategy

- NDCPi Board approved the NFTZ Strategy and budget, which focuses on promoting the NFTZ point to clients, government and international trade centres. Implementation of the Strategy is now underway.
- Business Retention and Expansion support is given by providing firms with the information and relevant contacts needed through a 'single contact point' and support was provided to the Region's FDI investment missions.

#### Business Outreach Program

- The second series of six NFTZ Seminars kicked off at the City Hall in St. Catharines, on May 29<sup>th</sup>. This was a collaboration with the Economic Development Office and NFTZ geared towards building awareness of FTZ services to potential new clients from across Niagara. Representatives from Canada Border Services Agency, Canada Revenue Agency and the St. Lawrence Seaway presented. Thirteen companies attended the seminar.
- Niagara Industrial Association Showcase, May 15<sup>th</sup>: NFTZ had a trade booth at the daylong networking event, which focused on advancing the interests of Niagara's industrial sector.
- Team Niagara met with representatives from the Polish, Hungarian, German, Netherlands and British Consulates in Toronto, at the end of April, to introduce the Niagara region and discuss opportunities to work together. Subsequently, Polish and Hungarian officials attended the NFTZ seminar on May 29<sup>th</sup> and presented to Niagara companies on export opportunities.

#### Hamilton-Niagara Partnership:

- NFTZ manager visited Cleveland with Hamilton Niagara Partnership representatives and met with five prospective investors, who are interested in visiting the region.

#### Inward Missions

- Latvian businesses visited the Niagara region on June 3rd. Two companies were from agribusiness and five companies were from engineering and fabrication companies. They were exploring business opportunities and strategic partnerships with Niagara companies.
- Czech business delegates visited the Region on May 29<sup>th</sup> and a joint trade and investment presentation was given to the group.

#### Networking Connects

- NFTZ has joined the Association of International Customs Brokers.

#### Collaborative Taskforces

- The second NFTZ Task Force Meeting was held on April 9<sup>th</sup>. Task force members include representatives from Federal, Provincial, Regional Agencies and the Private sector. Thirty-five representatives attended the meeting.
- Hamilton Niagara Transport Coordination: initiated through MP Vance Badawey's office, with a focus on Niagara-Hamilton (Southwestern Ontario). This economic cluster is an integral part of Transport Corridors and Canadian Transportation Logistics Strategy.
- Transport Canada Forum: NFTZ manager moderated a session on 'Diversifying and Leveraging Exports through e-commerce' with a panel of local exporters comprehending their opportunities and challenges. Other sessions involved Transport Canada's issues on infrastructure, policies, and data.

Manager, Business Development and Expedited Services (Incentives Review, research impact of Development Charges on economic development)

- Site Selection Support: eight site selection requests were received. This included requests from the Province of Ontario, Toronto-based realtors, and private investors.
- The results from these inquiries included requests for additional information and two site tours.
- Three Industrial Development Charge Grant applications were approved. This program supported \$3.4 million in new investment and the creation of 18 new jobs this quarter.
- Through the Gateway Economic Zone & Centre CIP Incentives Program Niagara Region received three new applications. Two legal agreements for previously approved applications were created and distributed.
- As part of the on-going incentive review at Niagara Region participated in three inter-departmental meetings.
- Attended the grand opening of a company that relocated from the GTA to Niagara region, as part of Niagara Economic Development's newly created

*Employment Land Strategy: Identifying and Creating Regionally Significant Employment Lands.*

Aftercare Program.

Existing employment lands in Niagara, which are located throughout the region, are generally smaller sites, which has limited the ability to create a truly regional employment area. Niagara Region Planning and Development, with support from Niagara Region Economic Development, is reviewing the opportunity to create a large provincially significant regional employment zone.

Manager, Business Development and Expedited Services (Support the Regional Employment Lands Study and act on recommendations, provide input into the MR/OP, Site Finder, Premier Sites)



- Participated in two meetings with staff from Planning and Development Services to review drafts of Niagara Region's draft Employment Lands Strategy Background Report.
- Participated in three meetings with staff at the City of Niagara Falls to develop new and innovative ways of using Niagara Site Finder. This included adding additional data layers and proactively engaging local commercial and industrial brokers in one-on-one meetings.
- Attended two meetings with local stakeholders regarding the potential development of lands managed by St. Lawrence Seaway Management Company.

*Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business.*

The success of the Niagara Region, in terms of economic and population growth, is dependent on successfully marketing the region to target audiences. There are two distinct marketing initiatives. The first initiative is aimed at foreign and domestic companies and promotes Niagara as a competitive location in which to do business. The second initiative is focused on attracting new and recent immigrants to Ontario, to the region to increase the population and workforce and achieve long-term sustainable growth.

Manager, Trade and Investment (Identify FDI target markets and sectors, lead investment missions with partners, lead generation, organize and participate in inward missions.)

- Continued to concentrate Foreign Direct Investment [FDI] missions in the three priority geographic markets, the United States, the United Kingdom and Europe, given their 85%+ contributions to Ontario's FDI over the past 12 years. The sectors of focus were expanded from just agri-business to any value-added processing activities, which are essentially green and in the category of 'latest growth trends'.
- Participated in lead generation meetings with 12 companies in the United Kingdom; 21 companies in Europe and 19 [based on two separate missions] companies in the U.S., for a total of 52 meetings in the Second Quarter of 2019.
- Provided support, along with the Manager, Foreign Trade Zone Point, to an incoming mission of business people, trade commissioners and senators from the Czech Republic.
- Now involved in active follow-up with the companies involved in the 52 meetings, identified above.

Manager, Strategic Marketing (Implementation of marketing plan to target audiences as a location for business and investment and to attract immigrants, Niagara Ambassador program, communications/PR campaign to promote Niagara's business and investment successes, implementation of a CRM system.)

### Key Marketing Results

- Marketing plan on track for Q1 and Q2 deliverables.
- Niagara Economic Development e-newsletter launched in May. Open rates are strong at 55%, and there is consistent engagement in the first two issues with clickthroughs of content at 65%. Since the launch, e-newsletter subscriber rates have increased by 23%.
- Niagara Ambassador Program launched in May, with 45 sign ups in the first month. Ambassador updates have had an immediate impact on sharing news. Updates that have gone out through the network have increased social media engagement and clickthroughs 5-fold. For comparison, link clicks prior the program ranged from 10-50 clicks depending on content. Posts shared through the Ambassador network have clicks ranging from 100-130.
- Content plan has increased Q2 website traffic 42% over Q1 traffic. Content has been organic (unpaid) and included the development and sharing of key reports and information (Strategy Summary, Economic Update, Agriculture Profile, Manufacturing Profile, Niagara Foreign Trade Zone Seminars, etc.), blog posts and news items. These items, plus the e-newsletter and Ambassador Program, have increased social media content and sharing.

### Marketing Projects

- CRM system updates to be complete by end of June, with team training and implementation starting in July.
- Welcome Niagara Canada website updates are proceeding, with the immigration microsite being built out to increase accessibility and usability to newcomer audiences.
- Audit and updates of existing brochures, marketing materials, and Niagara Canada website have commenced.
- Planning underway for digital advertising and sponsored content placements in Q3 and Q4.

### Media & Thought Leadership

- Niagara Economic Update launched. Media coverage included article in the St. Catharines Standard on May 8th and 10-minute interview on CKTB 610 on May 9th.
- Ambassador Program launched. Media coverage included articles in the St. Catharines Standard on May 9th, Thorold News on May 10th, and a 5 minute interview on CKTB on May 10th.
- CKTB610 Radio Roundtable sponsored on Friday May 31st, with Regional speakers for three 10-minute segments, and two 10-minute roundtables.

*Streamline Planning Processes: Expediting Approvals Process*

Niagara Region has been proactive in supporting business growth and economic prosperity. Niagara Economic Development will continue to identify and reduce barriers to new private sector investment.

Manager, Business Development and Expedited Services (expedite approval processes working with the LAMs and Regional departments, host a workshop to identify and address barriers to industrial and commercial development.)

- Provided additional support to three clients to expedite approval processes with two local area municipalities and resolved an inter-departmental issue at Niagara Region.

*Increasing Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Business.*

Niagara Economic Development supports the Province's initiative to reduce the regulatory burden on business. In Niagara, development is regulated by a number of different bodies and complex policies. This has the effect of increasing the difficulty of manufacturers and agribusiness to do business that affects Niagara's competitiveness.

Economic Development Officer

- Irrigation update was presented at April's Agricultural Policy Action Committee meeting with a recommendation coming to PEDC from the committee.

*Workforce: Meeting Current and Future Talent, Professional, Skilled Trades and Labour Needs*

Access to a talented, professional, skilled and educated workforce is increasingly a concern for businesses and essential to ensure the continued growth of the regional economy.

Manager, Strategic Marketing (Promote Niagara as destination for skilled immigrants, working with the LIP)

- Welcome Niagara Canada website updates are proceeding, with the immigration microsite being built out to increase accessibility and usability to newcomer audiences
- Planning underway for digital advertising and sponsored content placements in Q3 and Q4

Manager of Business Development and Expedited Services



- 
- Participated on a panel discussion for the Niagara Catholic District School Board's "Pathways" event to speak about Niagara's economy, the local labour market, and the skills that employers are looking for.

Acting Director

- Meeting and support for Skills Advantage Ontario program with a focus on the steel industry.

*Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in a Global Economy*

Key infrastructure investments are required to increase Niagara's competitiveness and support business in the region as well as facilitate trade.

Acting Director with support from Manager, Research and Analysis and Economic Development Officer

- Support to Public Works Department to submit an Expression Of Interest to the National Trade Corridor Fund to initiate work on the East/West Corridor.
- Support to ensure access to broadband through the Niagara region
- Support to the manufacturing sector in regards to lowering electricity costs for large power users.
- Ongoing meetings with the Hamilton Port Authority and the St. Lawrence Seaway Management Corporation.

## **Alternatives Reviewed**

None applicable.

## **Other Pertinent Reports**

ED 1-2019 Economic Development Overview  
ED 2-2019 Economic Development Strategy

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**Prepared by:**  
Valerie Kuhns  
Acting, Director  
Economic Development

---

**Submitted by:**  
Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

## **Appendices**

None applicable.

*This report was prepared in consultation with and reviewed by Valerie Kuhns.*

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**Subject:** Niagara Housing Statement Final Summary Report

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, July 10, 2019

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## Recommendations

1. That Report PDS 27-2019 **BE RECEIVED** for information; and,
2. That a copy of Report PDS 27-2019 **BE CIRCULATED** to the Local Area Municipalities.

## Key Facts

- The purpose of this report is to inform Council of the *Niagara Housing Statement Final Report* (“the Report”) which outlines the results of the data collected, known as the “Niagara Housing Statement Database”.
- The Report provides a summary analysis of population, demographic and housing characteristics, core housing need, and key population sub-groups, including older adults, immigrant populations, and aboriginal identity, through the use of graphics, geographical mapping at the sub-municipal level, and other visual aids intended to assist in the interpretation of the data collected.
- The Niagara Region hosted a training and facilitation session for local municipal planners on June 7<sup>th</sup>, 2019 in order to provide information regarding the contents and capabilities of the Niagara Housing Statement Database, as well as to explore the use of an agent-based analysis platform to gain insight into the risks and rewards of various housing scenarios.
- Staff will work to ensure that the Niagara Housing Statement Database is hosted on the Niagara Region’s Open Data portal and website for use by the public. Additionally, Regional staff will be determining the extent to which further analysis is required to inform the various studies and projects currently being undertaken across the Corporation to address housing need and affordability.

## Financial Considerations

The Niagara Housing Statement project was funded through the 2018 Council Approved Operating Budget with contributions from the Planning and Development Services Department, and the Community Services Department. There are no direct financial implications arising from this report.



## **Analysis**

### ***Niagara Region Housing Market Analysis Report***

In December 2018, the Canadian Centre for Economic Analysis (CANCEA), was retained by the Niagara Region for the preparation of a database to inform the comprehensive review of the Niagara Region 10-Year Housing and Homelessness Action Plan and the development of a Regional Housing Strategy. Overseen by the Planning and Development Services and the Community Services Departments, the final dataset provides an accurate assessment of the current and future demand for ownership, rental, and affordable housing within the Niagara Region, including detailed demographic and housing trends, income levels, and demographic and housing characteristics at the sub-municipal levels.

In order to verify and discuss the specific data procured for each of the twelve (12) local area municipalities, a series of one-on-one consultation meetings were held in March 2019 with local planning staff. The feedback received identified few corrections or gaps in the data presented, and as such, these consultation sessions were followed by a presentation from the CANCEA Project Team at the April 17<sup>th</sup> Planning and Economic Development Committee meeting (Report No. PDS 17-2019), which outlined the implications of the preliminary analysis of the data collected on core housing need within Niagara.

With the final database completed and circulated to local municipal staff, CANCEA has now prepared a final summary report (see Appendix I) to both provide a more comprehensive understanding of the demographic and housing trends that can be inferred from the prepared database, as well as to satisfy the remaining requirements of the Request for Proposal. The report, which had been reviewed by staff in the Planning and Development Services Department, Community Services Department, and Niagara Regional Housing, provides a summary analysis of population, demographic and housing characteristics, core housing need, and key population sub-groups, including older adults, immigrant populations, and aboriginal identity, through the use of graphics, geographical mapping at the sub-municipal level, and other visual aids intended to assist in the interpretation of the data collected.

### ***Next Steps***

The Niagara Region hosted a training and facilitation session for local municipal planners on June 7<sup>th</sup>, 2019 in order to provide information regarding the contents and capabilities of the Niagara Housing Statement Database, as well as to explore the use of CANCEA's agent-based analysis platform to gain insight into the risks and rewards of various housing scenarios. Based on the feedback received at this session, as well as inter-Departmental discussions, Regional staff will be determining the extent to which

further analysis is required to inform the various studies and projects currently being undertaken across the Corporation to address housing need and affordability.

Additionally, Regional staff will be working internally to ensure that the Niagara Housing Statement Database is hosted on the Niagara Region's Open Data portal and website for use by the public.

## **Alternatives Reviewed**

N/A

## **Relationship to Council Strategic Priorities**

The new Regional Official Plan will assist in implementing Council's Strategic Priority of Labour-Ready Workforce.

## **Other Pertinent Reports**

- PDS 17-2019 Niagara Housing Statement – Affordable Housing Data

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**Prepared by:**  
Alexandria Tikky  
Planner  
Planning and Development Services

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**Recommended by:**  
Rino Mostacci  
Commissioner  
Planning and Development Services

---

**Submitted by:**  
Ron Tripp, P.Eng.  
Acting, Chief Administrative Officer

*This report was reviewed by Doug Giles, MCIP, RPP, Director of Long-Range and Community Planning, Planning and Development Services Department.*

## **Appendices**

Appendix 1                      Final Report – Niagara Region Housing Market Analysis                      Page 04

# Niagara Region Housing Market Analysis

Trends, current state and forecasts, 1996-2041

June 2019



CANADIAN CENTRE FOR  
ECONOMIC ANALYSIS



## ABOUT THE CANADIAN CENTRE FOR ECONOMIC ANALYSIS

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The Canadian Centre for Economic Analysis (CANCEA) is a socio-economic analytics and data firm. CANCEA provides objective, independent and high data intensity analysis and consulting services.

CANCEA uses modern techniques in data science, including agent-based modelling, for econometric analysis, risk management assessments, and estimating current and future population and household characteristics. CANCEA's field expertise includes market analysis, policy evaluation, business model optimization, cost-effectiveness and rate-of-return analysis, macroeconomic analysis, insurance risk evaluation, land use and infrastructure planning, logistics, and labour market analysis. CANCEA also provides comprehensive Canadian data services.

At the centre of CANCEA's analytical capabilities is an agent-based platform called Prosperity at Risk® that is an extensive, data-driven model of 56,000 locations across Canada. Given the systems focus behind all of CANCEA's work, CANCEA has a one-model approach to its analysis which allows various disciplines and stakeholders to be incorporated into a single analysis.

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## ABOUT THE REPORT

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CANCEA does not accept any research funding or client engagements that require a pre-determined result or policy stance, or otherwise inhibits its independence.

In keeping with CANCEA's guidelines for funded research, the design and method of research, as well as the content of this study, were determined solely by CANCEA.

This information is not intended as specific investment, accounting, legal or tax advice.

**Citation:** Niagara Region Housing Market Analysis. CANCEA. June, 2019.

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## GLOSSARY

**Census Household:** Contains at least one census family.

**Census Family:** Defined as a married couple or a couple living common law, with or without children of either and/or both spouses; or a lone parent of any marital status with at least one child living in the same dwelling. Grandchildren living with their grandparent(s) but no parents are also considered a census family.

**CMA:** Stands for Urban Census Metropolitan Area, defined by Statistics Canada as an area consisting of one or more neighbouring municipalities situated around a major urban core.

**CMHC:** Stands for Canada Mortgage and Housing Corporation, a Crown Corporation of the Government of Canada that acts as Canada's national housing agency.

**Core Housing Need:** According to CMHC, a household is said to be in core housing need if its housing falls below at least one of the adequacy, affordability or suitability standards and it would have to spend 30% or more of its total before-tax income to pay the median rent of alternative local housing that is acceptable (meets all three housing standards). Housing standards are defined as follows:

**Adequate housing** is reported by residents as not requiring any major repairs.

**Affordable housing** costs less than 30% of total before-tax household income.

**Suitable housing** has enough bedrooms for the size and makeup of resident households, according to National Occupancy Standard requirements.

**DA:** Stands for Dissemination Area, a small area composed of one or more neighbouring dissemination blocks with a population of 400 to 700 persons. This is a geographical resolution used by Statistics Canada.

**High-Density Housing:** Units in apartment buildings of five storeys or more. In some situations, housing is mixed with other uses.

**LIM-AT:** Stands for low-income measure, after tax, and is a metric for determining whether a household falls below a low-income threshold specific to the household size, based on whether its income is below 50% or median adjusted after-tax income.

**Low-Density Housing:** Single-detached and semi-detached housing.

**MCR:** Stands for Municipal Comprehensive Review, a new official plan, or an official plan amendment, initiated by an upper- or single-tier municipality under section 26 of the Planning Act that comprehensively applies the policies and schedules of the Provincial Growth Plan.

**Medium-Density Housing:** Units in row houses, duplex apartments, and apartment buildings of four storeys or less.

**Multiple-Family Households:** Households that consist of two or more census families. There may also be persons who are not in a census family in this type of household.

**National Occupancy Standard:** A standard developed by CMHC through consultations with provincial governments which is used to determine the number of bedrooms required by a household in order to be suitably housed.

**Non-Census Household:** Comprises a single person or two or more persons in a non-census family.

**Primary Household Maintainer:** The first person in the household identified as someone who pays the rent or mortgage, the taxes, or the electricity bill, and so on, for the dwelling.

**St. Catharines-Niagara CMA:** Comprises the municipalities of St. Catharines, Niagara Falls, Welland, Fort Erie, Lincoln, Port Colborne, Thorold, Pelham, Niagara-on-the-Lake and Wainfleet.



## FINDINGS AT A GLANCE

The aim of this study was to develop the Niagara Housing Statement Database in support of the Regional Housing Study and Housing and Homelessness Action Plan. It compiles the available information about the current stock of rental, ownership and affordable housing in Niagara Region by type and location. This information is combined with data about the households themselves, including the type of household, income level, age of household maintainer, and whether the household faces core housing need or affordability challenges. The study also provides a forecast to 2041 of the future housing stock based on the Provincial Growth Plan projections as of May 2019 and current economic trends.

### DEMOGRAPHICS

---

Niagara Region is facing unique challenges relative to much of Ontario. It already has a significantly older population than the province, and this demographic aging is expected to continue to trend upwards in the future. The population aged 65 years or older is expected to more than double by 2041. Single-person households are the dominant type of households, a trend which is also expected to continue as the population ages and household sizes decrease.

### HOUSING STOCK

---

Niagara Region's housing stock is primarily low-density. Single-detached homes are the most common dwelling type, followed by low-rise apartments and row houses. Medium- and high-density housing represents 24% of the total stock and houses 71% of the renter population.

### HOUSING NEED

---

Core housing need affects 13% of households in Niagara Region, or approximately 24,000 households, according to the most recent figures. Renter households are in core housing need at three times the rate of owner households and also live in unsuitable, unaffordable and inadequate dwellings at higher rates than their owner counterparts. Of these components of housing need, affordability is the main challenge in the Region, as rates of housing unsuitability and inadequacy are low overall. Almost all households affected by core housing need are in the lower 4 income deciles, and of these, the majority are in deciles 1 and 2, earning less than \$29,500 per year.

Similar rates of core housing need exist across most ages of household maintainers. Rates are slightly higher for households with a maintainer younger than 35 or older than 84. The household types predominantly affected are single-person households, which are the large majority of households in core housing need, and lone-parent households.

## 1.0 INTRODUCTION

### 1.1 OBJECTIVES

---

The aim of this study was to develop the Niagara Housing Statement Database in support of the Regional Housing Study and Housing and Homelessness Action Plan. It compiles the available information about the current stock of rental, ownership and affordable housing in Niagara Region by type and location. This information is combined with data about the households themselves, including the type of household, income level, age of household maintainer, and whether the household faces core housing need or affordability challenges. The study also provides a forecast to 2041 of the future housing stock based on the Provincial Growth Plan projections as of May 2019 and current economic trends.

Through the course of this study, working with Niagara Region, CANCEA:

- Created a comprehensive dataset that:
  - combines housing and demographic data in one place for use by Regional and local municipal planners and policymakers; and
  - includes historical forecasts and projections up to 2041 for key housing and demographic metrics.
- Conducted a housing need analysis to determine:
  - how many households are in core need;
  - how many households face affordability challenges; and
  - which groups are facing pressure in the ownership and rental markets.
- Consulted with local municipalities to:
  - confirm that data capture was representative of the local experience;
  - identify any relevant gaps;
  - provide training on the use of the database; and
  - determine the main scenarios of interest to test for the next study phase (scenario-based analysis).
- Presented findings to the Niagara Region Planning and Economic Development Committee.

This report is intended to provide a curated selection of representative housing and demographic data, along with graphs and tables to easily visualize this information, and to summarize key findings from the study.

### 1.2 METHODOLOGY

---

The Regional dataset was created using CANCEA's statistical analysis and data simulation platform, which makes use of 15 years' worth of community-level data housed in a linked-path agent database covering 55,000 regions across Canada. The platform is regularly updated to include the most recent Statistics Canada datasets and census information.

The population projections have been aligned to the Provincial Places to Grow targets as well as the numbers generated by the Municipal Comprehensive Review. These population projections, along with life expectancies and birth rates, are used to determine the number of households and the dwelling sizes these would require under different conditions and over time.

Information about the current housing stock, the way in which the current population is housed (affordability, suitability and adequacy) and dwelling formation rates (both market and non-market) are used to assess the supply of housing over time.

This study and the accompanying dataset draw primarily from Statistics Canada census datasets and CMHC tables. All population and household counts have been corrected for census undercounts. As a result, these may be a few percent larger than those found in the census table. All income values are presented in constant 2015 dollar figures to be consistent with the 2016 census results.

Additional data included was provided by Niagara Region, including:

- Provincial Policy Statement tables;
- Core housing need custom cuts; and
- Affordable housing data.

All figures, tables and statistics included in this report derive from these sources unless otherwise specified.



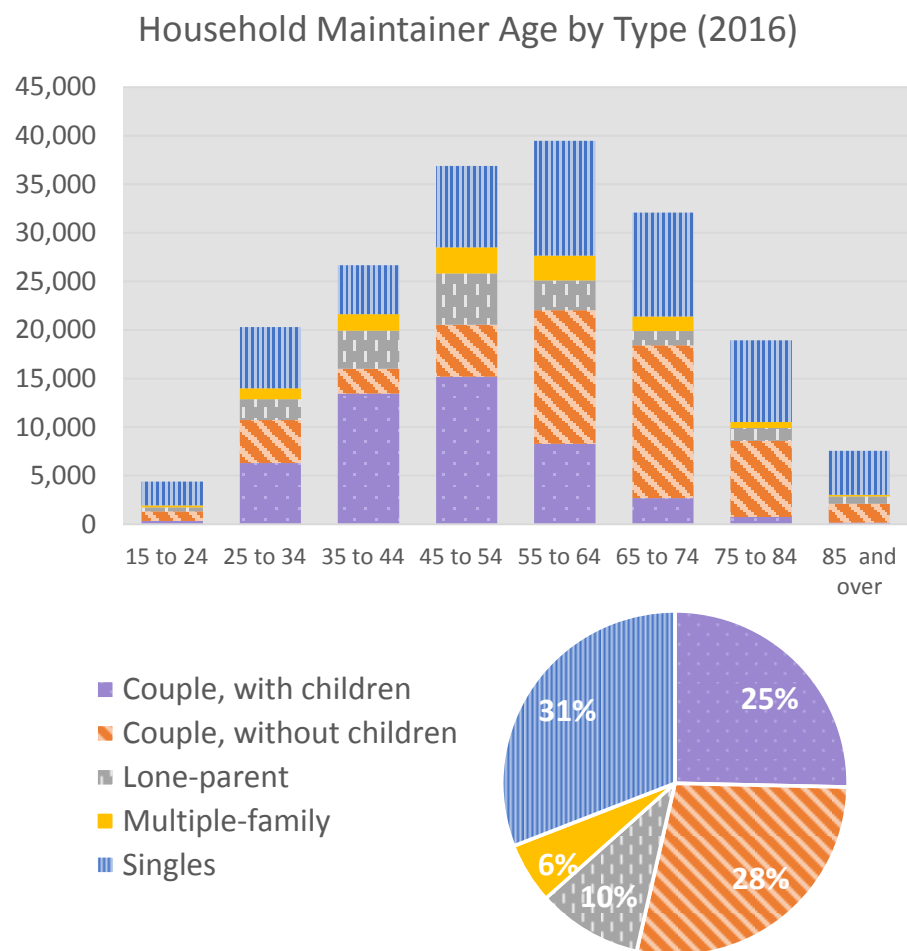
## 2.0 POPULATION AND HOUSEHOLDS

### 2.1 DEMOGRAPHIC TRENDS

#### 2.1.1 HOUSEHOLDS

In Niagara Region, single-person households are the most common type (31%)<sup>1</sup>, followed by couples without children (28%) and with children (25%). The proportion of single-person households is 1.5 times the provincial average. Additionally, 41% of singles are 65 years or older, which is 21% higher than the rest of Ontario.

**Figure 1** Households by age and type, 2016

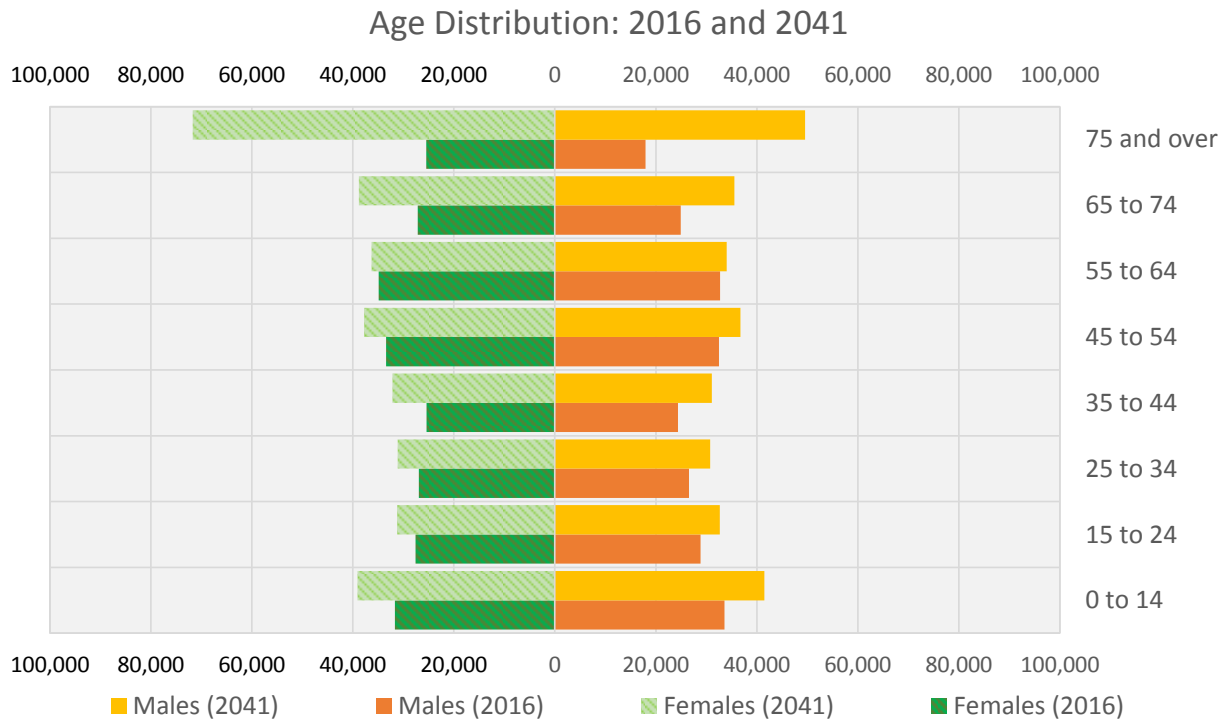


<sup>1</sup> Non-census households include all non-census family households (see glossary) and are predominantly single-person households. For simplicity this report will refer to non-census households as singles or single-person households moving forward.

### 2.1.2 POPULATION TRENDS

The age profile of Niagara Region is expected to increasingly skew older as 2041 approaches. By 2041, it is expected that the population aged 75 and older will be 50% larger than the 14 and under population. At 180%, the growth rate of the cohort aged 75 years or older is at least 4 times larger than the growth rate of any other cohort. The older population is projected to also skew female.

**Figure 2** Population by age and sex, 2016 and 2041

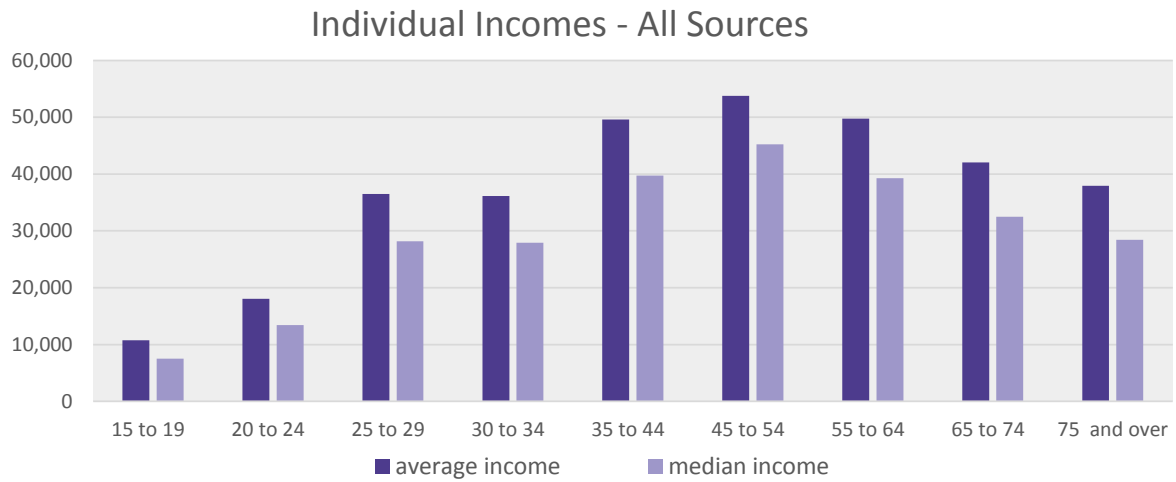


## 2.2 EMPLOYMENT AND INCOMES

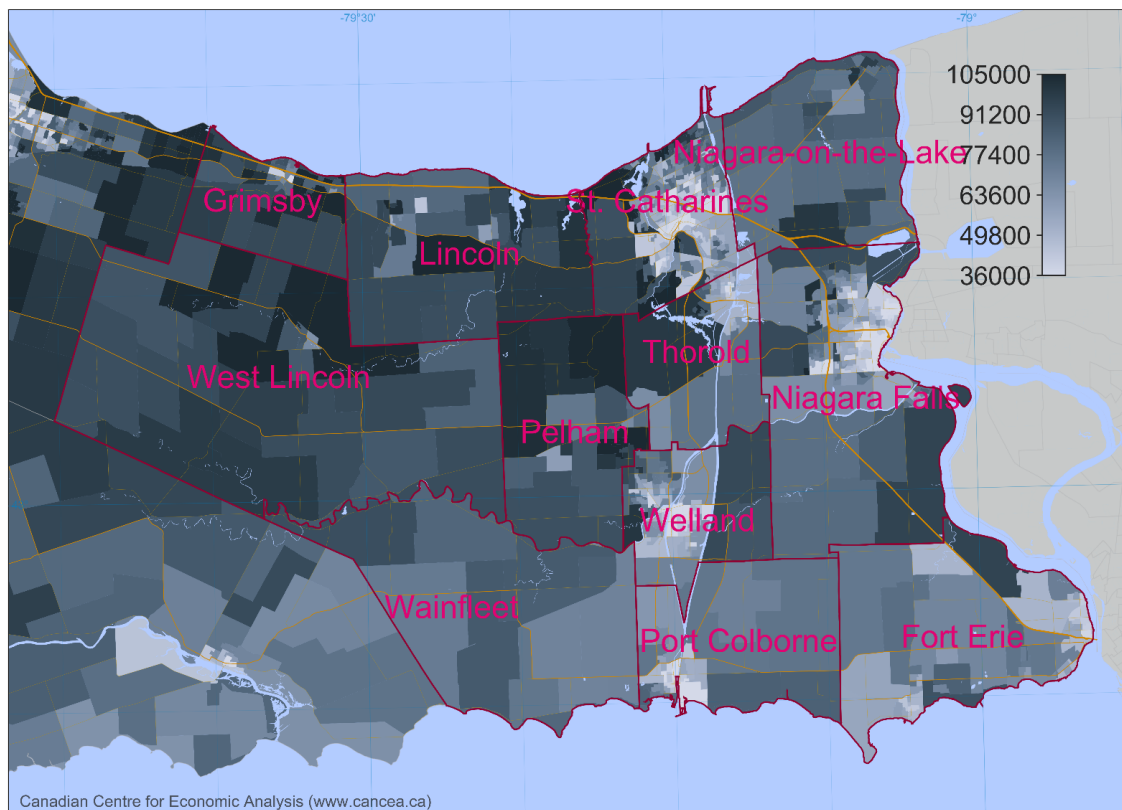
The average individual income in Niagara Region is \$41,591, while the median income is \$31,433. The discrepancy between the average and the mean is an indication of the degree of income disparity in the Region. Incomes are generally higher in the predominantly rural local municipalities and lower in the larger cities, particularly near the downtown cores, as seen in Figure 4.

In this analysis, incomes are reported both at the individual and household level. To analyze differences between individuals and households of different income levels, individual and household income deciles are used. Each population (household) decile contains 10% of the Regional population (households). The lower-bound income of each decile is the income of the person or household within the decile with the lowest income, and the upper bound is the income of the person or household with the highest income. Income deciles for Niagara Region are given in Table 1.

**Figure 3** Average and median individual incomes, 2016



**Figure 4** Median household income by dissemination area (legend in \$), 2016





**Table 1** Individual and household income deciles for Niagara Region, 2016

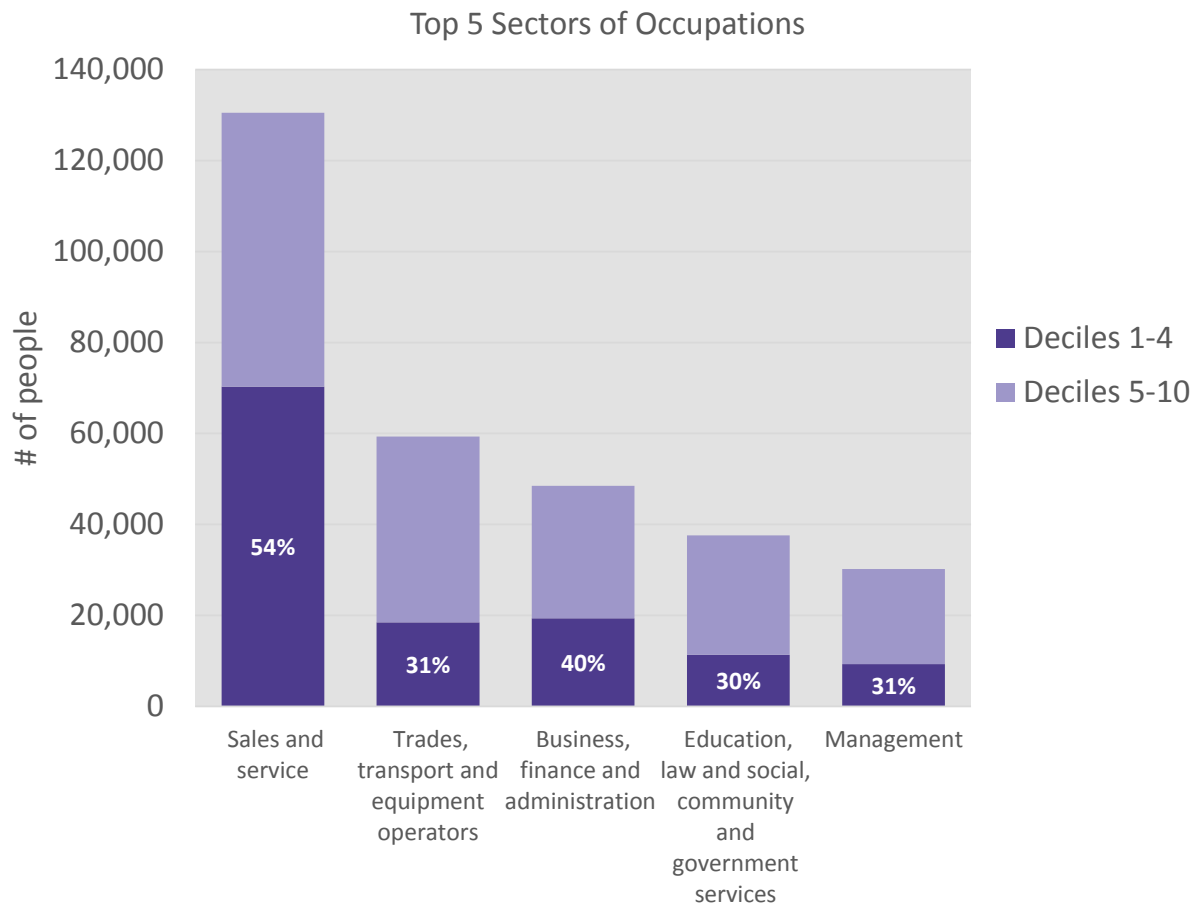
	Individual Income	Household Income
Decile 1	Less than \$8,900	Less than \$19,400
Decile 2	\$8,900 to \$13,999	\$19,400 to \$29,499
Decile 3	\$14,000 to \$19,099	\$29,500 to \$39,799
Decile 4	\$19,100 to \$24,799	\$39,800 to \$52,699
Decile 5	\$24,800 to \$31,399	\$52,700 to \$68,399
Decile 6	\$31,400 to \$38,999	\$68,400 to \$84,299
Decile 7	\$39,000 to \$48,999	\$84,300 to \$101,199
Decile 8	\$49,000 to \$62,799	\$101,200 to \$122,199
Decile 9	\$62,800 to \$85,799	\$122,200 to \$155,899
Decile 10	\$85,800 or more	\$155,900 or more

### 2.2.1 OCCUPATION

In Niagara Region, there is twice as many residents that report having an occupation in sales and service<sup>2</sup> as in the next most common occupation type. People in these occupations are more concentrated in lower income deciles than those in any other occupation type. In fact, over half of the people in sales and service occupations (about 13,400) have individual incomes below \$24,800, placing them in the lower 4 individual income deciles. The main occupation types are illustrated in Figure 5.

<sup>2</sup> This category contains retail and wholesale sales occupations and customer and personal service occupations related to a wide range of industries, such as accommodation and food service, travel, tourism, and cleaning services. See the National Occupational Classification (NOC) 2016 Version 1.0 on the [Statistics Canada website](https://www150.statcan.gc.ca/n1/pub/90-62-1/2016001/article/14461-eng.htm) for the full list of definitions of occupation types.

**Figure 5** Top 5 occupation types, 2016



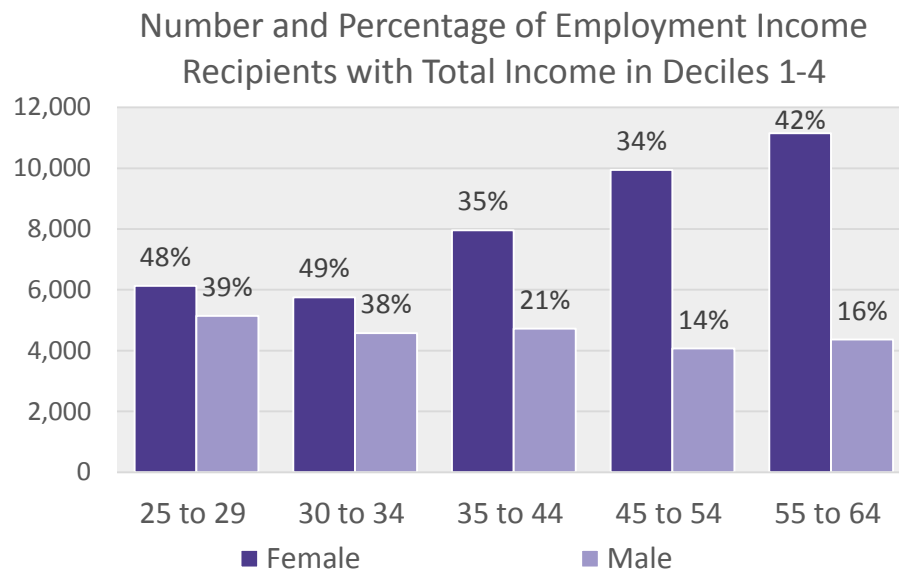
### 2.2.2 EMPLOYED, LOWER-INCOME POPULATION CHARACTERISTICS

The population of employment income-earners whose total income is in the lower 4 deciles skews female. The discrepancy between the share of all men and women with employment income whose total income is in the lower 4 income deciles increases with age, as shown in Figure 6.

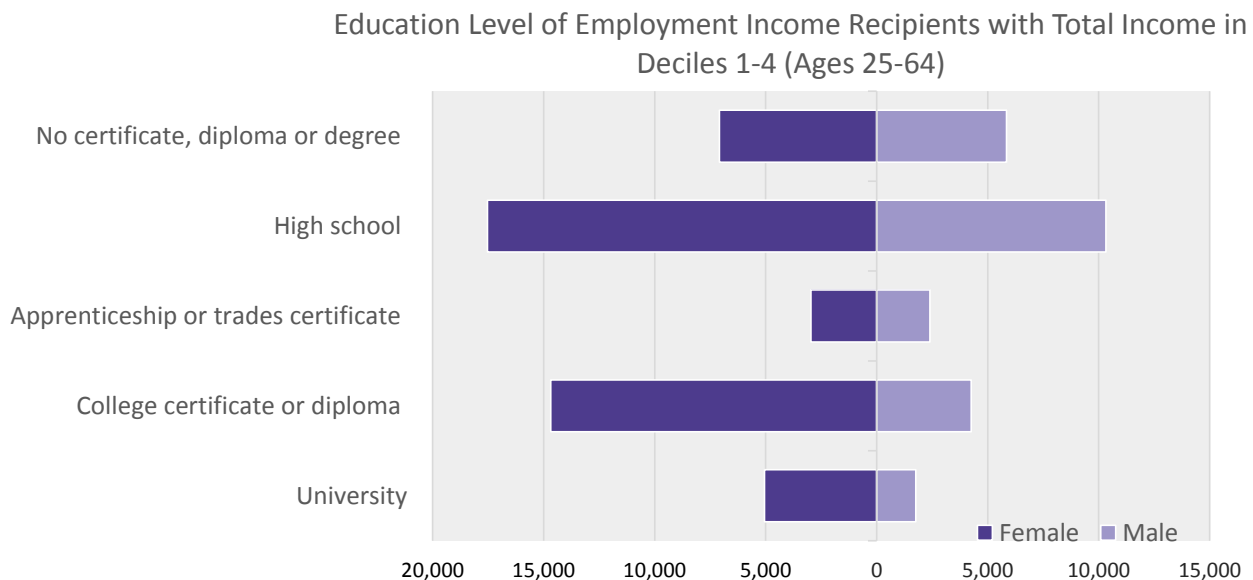
The maximum educational attainment of most of the population whose total income is in the lower 4 deciles<sup>3</sup> is a high school certificate, followed by a college certificate or diploma and no certificate or diploma. The subset of this population with a college certificate or diploma or at least some university skews significantly more female than the population with other educational attainment levels (see Figure 7).

<sup>3</sup> This population also includes individuals who do not receive employment income and is therefore slightly larger than the population represented in Figure 6.

**Figure 6** Gender and age of employment income recipients with a total income in deciles 1 to 4



**Figure 7** Education level of individuals with a total income in deciles 1 to 4 by gender

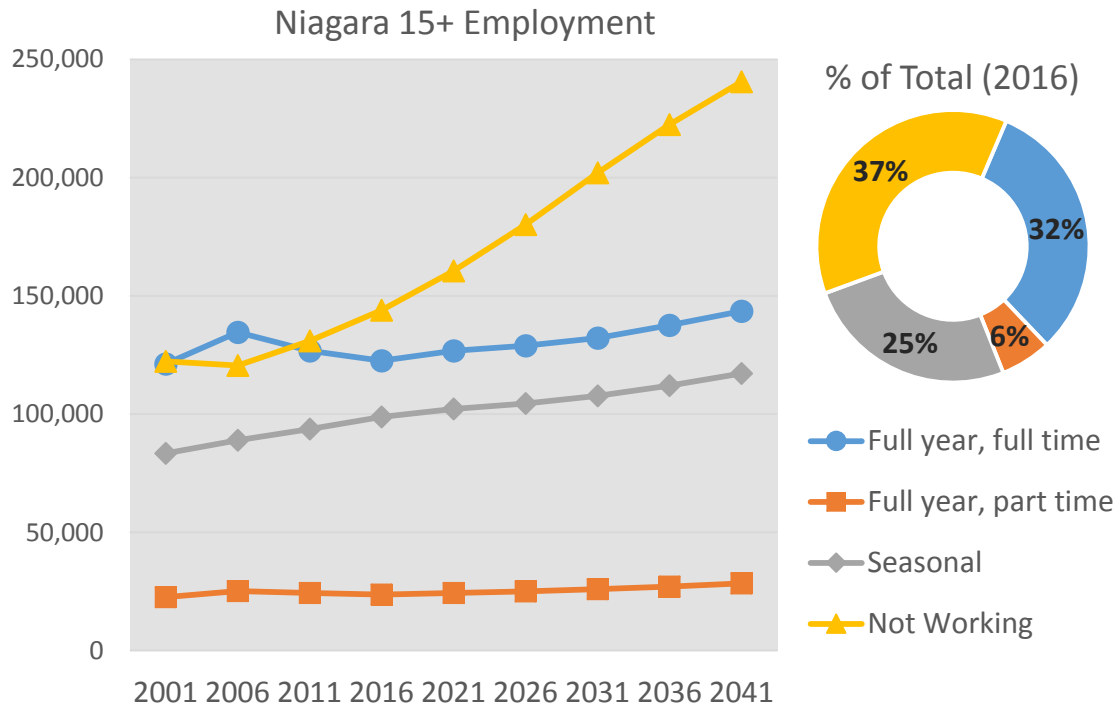


### 2.2.3 EMPLOYMENT INTENSITY

The Region is seeing an increasing number of people who are not employed, which correlates to the demographic aging of the population. Since 2011, Niagara Region has had more people not employed than people employed in full-time work. In parallel, the local dependency ratio – the proportion of residents aged 15 or younger and 65 and older relative to those in their working years (15 to 65) – will also increase.



**Figure 8** Employment trends and projections, 2001-2041



## 2.3 CONCLUDING REMARKS

The following demographic and employment trends will affect future housing demand in Niagara Region, including the type of housing, location, tenure, density, etc.

- The demographic aging of the population
  - Demographic aging creates a trend towards smaller household sizes.
- The importance of sales and service employment, which is primarily lower-wage
  - Over half of the people in sales and service occupations are in the lower 4 individual income deciles.
  - Lower-income households are more concentrated in the larger cities in the Region, particularly in the downtown areas.
  - The ability to house this population can have an effect on the local economy.

### 3.0 HOUSING STOCK

#### 3.1 DWELLING TYPES AND TENURE

The most common type of dwelling in the Region are single-detached houses. Low-density dwellings represent 73% of all housing in the Region. The composition of Niagara Region's housing stock by dwelling type is presented in Table 1.

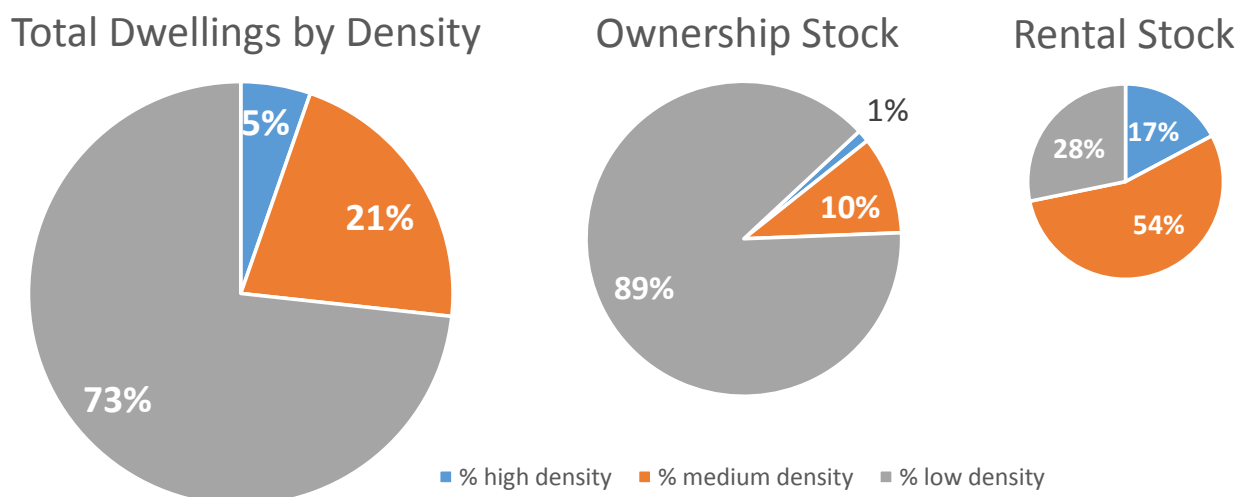
**Table 1** Housing stock by dwelling type, 2016

Density	Dwelling Type	Number of Dwellings
Low	Single-detached	126,208
Low	Semi-detached	9,734
Medium	Row house	13,701
Medium	Apartment 5 storeys or less	19,975
Medium	Duplex Apartment	6,050
Medium	Other	486
High	Apartment over 5 storeys	9,864

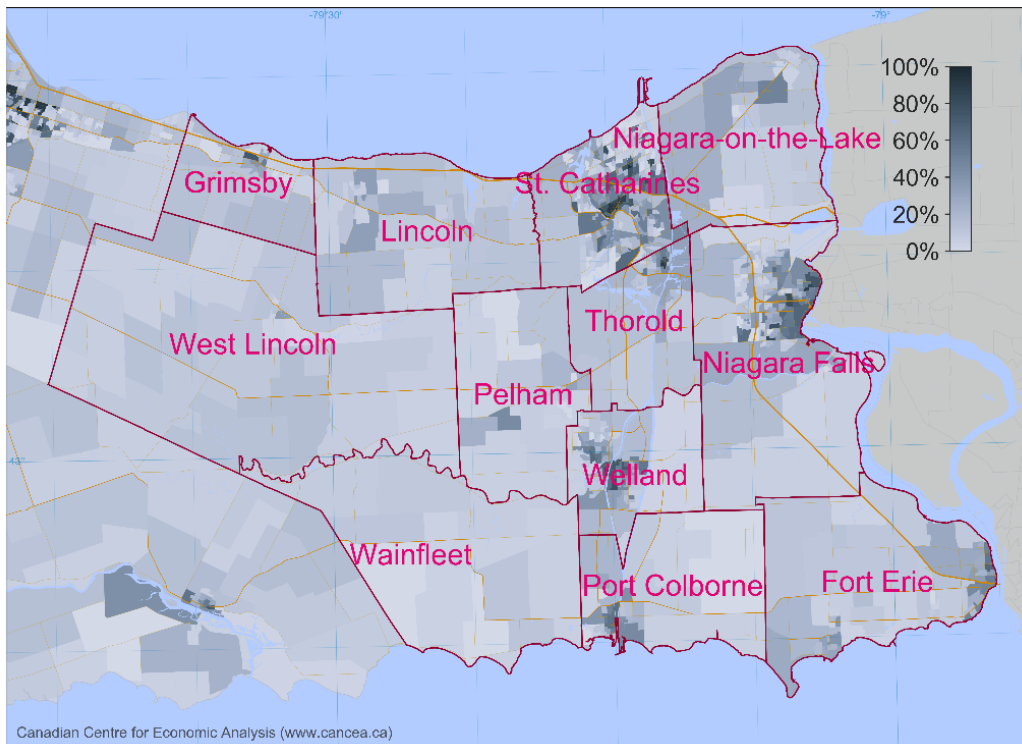
The Region's housing stock is composed of 74% ownership and 26% rental. The majority of the rental stock is concentrated in the larger cities in the Region, especially around the downtown cores, with very little rental stock outside of these areas (see Figure 9). Most ownership stock is low-density housing while most rental stock is medium- or high-density.

- 9 in 10 owners live in low-density housing.
- Over half of renters live in medium-density housing.

**Figure 9** Housing density by tenure, 2016

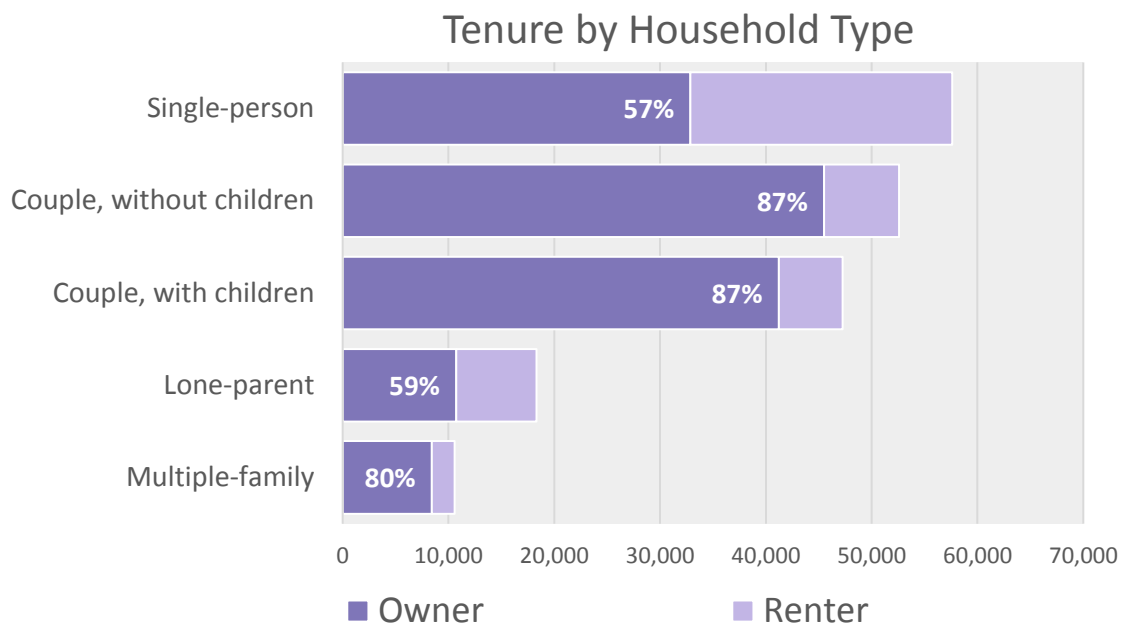


**Figure 10** Percentage of rental stock by dissemination area, 2016



The household types most likely to be renters are single-person and lone-parent households, as shown in Figure 11.

**Figure 11** Tenure by household type, 2016



## 3.2 SHELTER PRICES

### 3.2.1 OWNERSHIP

In the 2001 to 2016 period, the median self-reported values of single-detached houses and other medium-density attached dwelling types have increased by 114% and 113%, respectively, in the St. Catharines-Niagara CMA<sup>4</sup>. On average, this is an annual increase of about 7.5%. The self-reported value of units in apartments of five storeys or more has increased by 81% in the same timeframe, a 5.4% average annual increase.

Market prices, which reflect the prices of the subset of the housing stock that is newly built or resold, have increased by 36% between 2016 and 2019 in Niagara Region as a whole. On average, this is a 12% annual increase, although the increases have been uneven year over year (see Table 3).

**Table 2** Self-reported dwelling values, 2001-2016 (CMA)

Year	Single-detached house	Apartment 5+ storeys	Other
2001	\$139,371	\$99,225	\$112,742
2006	\$195,269	\$145,380	\$160,177
2016	\$298,208	\$179,421	\$240,412

**Table 3** Recent market prices, 2016-2019<sup>5</sup>

Year	All Dwelling Types	Change from previous year
2016	\$333,030	—
2017	\$403,099	21%
2018	\$405,063	0%
2019	\$454,780	12%

### 3.2.2 RENTAL

Average rents reported by CMHC include rents paid by all tenants in the rental market, including long-term tenants whose rents may be below market. Average rents by number of bedrooms in the St. Catharines-Niagara CMA are shown over time in Figure 12. Between 1996 and 2018, the average year-over-year increase in CMHC average rents for a 1-bedroom apartment in the St. Catharines-Niagara CMA was 2.4%. In recent years, between 2016 and 2018, the average year-over-year increase was 4.3%. During that same timeframe, according to data from Padmapper's monthly Canadian Rent Reports<sup>6</sup>, market rents increased by 9% per year on average in the St. Catharines-Niagara CMA. Market rents are higher in general

<sup>4</sup> Note that throughout the report CMA indicates that data is for the St. Catharines-Niagara CMA, which includes all local municipalities of Niagara Region with the exception of Grimsby and West Lincoln. Unless CMA is specified, the data covers Niagara Region in its entirety.

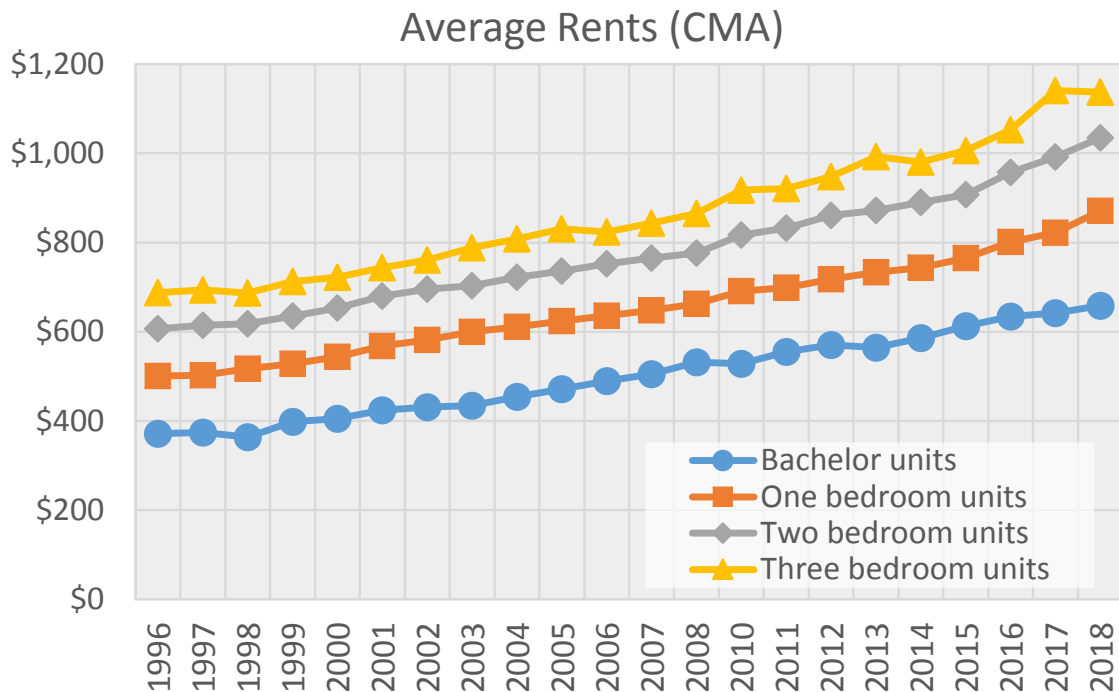
<sup>5</sup> Source: *Niagara Association of Realtors monthly market reports (January 2016-February 2019)*, available on the [Niagara Association of Realtor's Website](#). Accessed April 3<sup>rd</sup>, 2019.

<sup>6</sup> Available on [Padmapper's Rental Data Blog](#). Accessed April 4<sup>th</sup>, 2019.

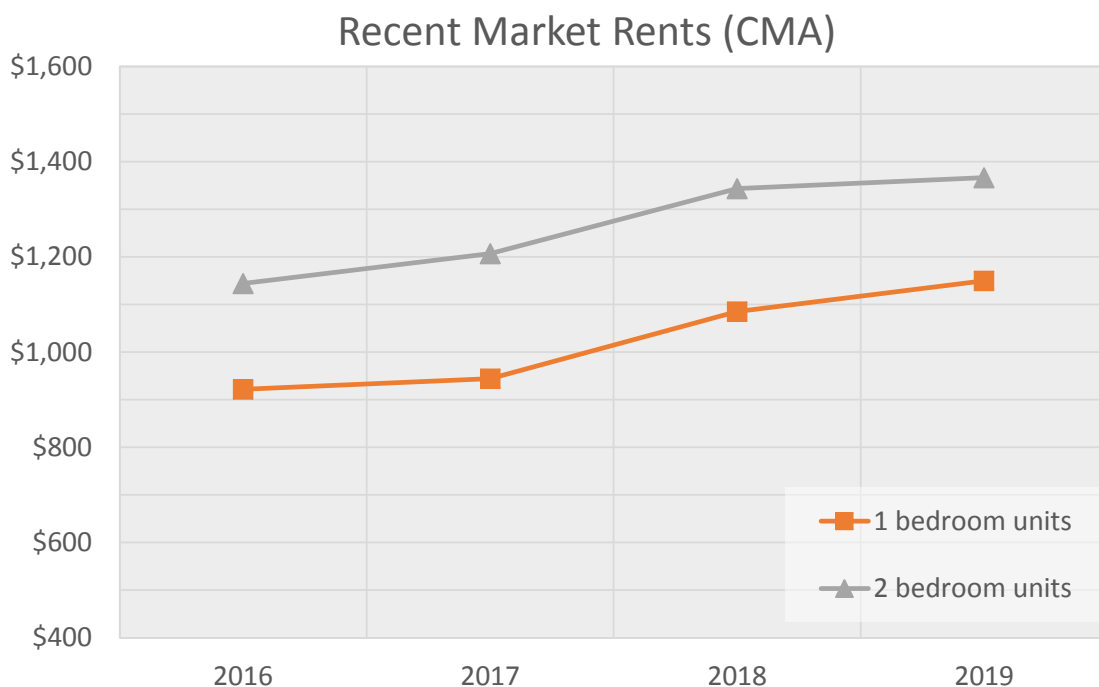


since new tenants will generally be charged a higher rent compared to what a long-term tenant would pay, and only a subset of all rental units are put on the market in any given year.

**Figure 12** Average rents by number of bedrooms reported by CMHC, 1996-2018

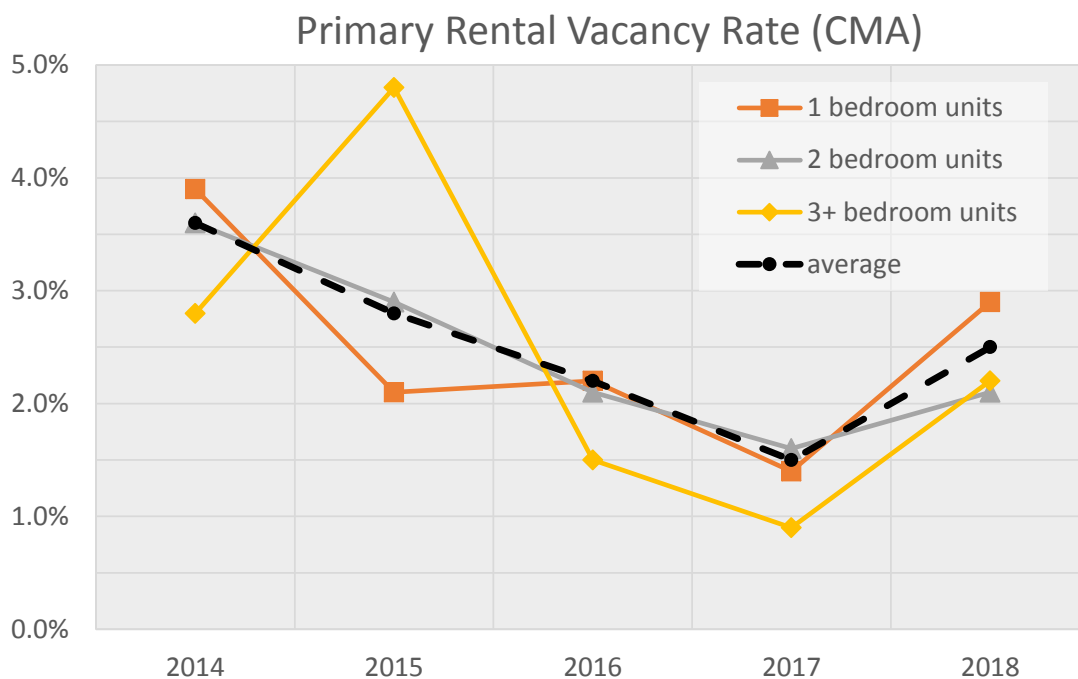


**Figure 13** Market rents reported by Padmapper, 2016-2019



The rental market in the St. Catharines-Niagara CMA appears to have tightened considerably in the past decade. According to CMHC's yearly Rental Market Reports from 2015 to 2018<sup>7</sup>, which cover the St. Catharines-Niagara CMA, the average vacancy rate for primary rental units decreased for six consecutive years from 2011 to 2017, increasing for the first time between 2017 and 2018. Vacancy rates by number of bedrooms for the 2014-2018 period are reported in Figure 14. In 2016, the turnover rate was reported to be among the lowest in Ontario, third only to the rental markets in Toronto and Hamilton. Reasons for this tightening of the rental market, according to CMHC, include increased demand from the immigrant population and international students, as well as a growing gap between rental prices and ownership costs that reduces movement out of the rental market and into homeownership.

**Figure 14** CMHC primary rental vacancy rates by number of bedrooms, 2014-2018



### 3.2.3 AFFORDABLE HOUSING UNITS

In Niagara Region, there are 8,404 affordable units available, which includes public housing units operated and managed by Niagara Regional Housing; non-profit and cooperative housing programs; rent supplement units; as well as units provided through the New Development Housing Allowance Program for private developers (Table 4 provides a breakdown by type and mandate). Almost three-quarters of the units are mandated for families or seniors<sup>8</sup>. In terms of size, 50% of units have one bedroom, 25% have three or more bedrooms, 23% have two bedrooms and the remainder are bachelor units. These are mainly found in St. Catharines, Niagara Falls and Welland.

<sup>7</sup> Available on the [CMHC website](#). Accessed June 20<sup>th</sup>, 2019.

<sup>8</sup> Applicants aged 55 years and older are eligible for senior housing.

**Table 4** Affordable housing units by mandate and type, 2019

	Senior	Adult	Family	Aboriginal	Alternative	None	Total
New Development	315	325	26	-	43	-	<b>709</b>
NFP / Coop	1024	29	2336	128	84	-	<b>3601</b>
NRH Owned	1642	140	902	-	-	-	<b>2684</b>
Rent Supplement	-	-	-	-	-	1410	<b>1410</b>
<b>Total</b>	<b>2981</b>	<b>494</b>	<b>3264</b>	<b>128</b>	<b>127</b>	<b>1410</b>	<b>8404</b>

### 3.3 CONCLUDING REMARKS

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Niagara Region's housing stock differs between:

- Larger cities and rural communities – Larger cities have the bulk of the housing stock, the high- and medium-density stock and the affordable housing units in the Region.
- Tenure types – Almost 90% of owner households live in a low-density dwelling compared to just over 25% of renters.

There is some evidence that recent housing price and rent increases have exceeded long-term average rates.

- Average rents for a 1-bedroom apartment have increased by 4.3% between 2016 and 2018 compared to the 2.4% 22-year average.
- Self-reported housing values have more than doubled from 2001 to 2016.
- Market prices for homes have increased by 12% per year on average from 2016 to 2018, with a 20% increase between 2016 and 2017.

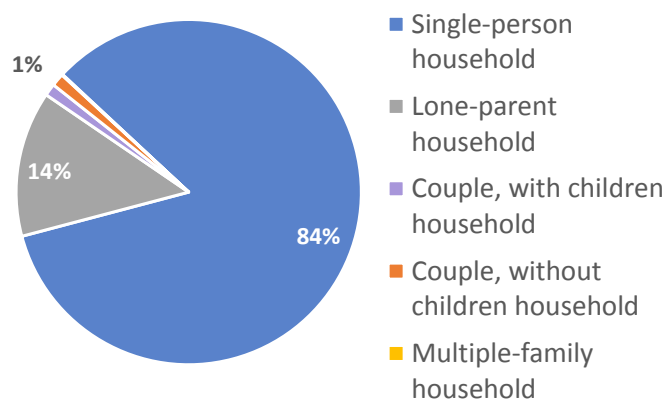
## 4.0 HOUSING NEED

### 4.1 CORE HOUSING NEED

Core housing need is the standard indicator of housing need in Canada used by CMHC and Statistics Canada. A household is considered to be in core housing need if its dwelling does not acceptably meet its needs, i.e. it is either too small<sup>9</sup>, in a major state of disrepair or too expensive given its budget, and there is no alternative acceptable housing that would cost less than 30% of total household income.

Core housing need affected a total of 23,830 households in 2016. Of this number, about 20,000 are single-person households and 3,250 are lone-parent households.

**Figure 15** Core housing need, share by household type, 2016



**Table 5** Households in core need by household type, 2016

Household Composition	% Core Need	# Core Need	Suitable Housing
Single-Person Households	34.7%	20,002	Bachelor or 1 bedroom
Lone-Parent Households	17.8%	3,254	2 or more bedrooms
Couples without Children*	0.5%	286	1 bedroom
Couples with Children	0.6%	271	2 or more bedrooms

<sup>9</sup> This is calculated based on the National Occupancy Standard. The number of bedrooms required by a household is derived according to the following (if household members meet more than one criteria, the first conditions listed take precedence over the subsequent): a maximum of two persons per bedroom; household members living as part of a married or common-law couple share a bedroom; lone parents have a separate bedroom; household members aged 18 or over have a separate bedroom; household members under 18 years of the same sex share a bedroom; household members under 5 years of the opposite sex share a bedroom if doing so would reduce the number of required bedrooms. The exception to the above is a household consisting of one person living alone. Such a household would not need a bedroom, i.e. they may live suitably in a bachelor apartment.



As shown in Table 5, the household types most vulnerable to core housing need are single-person and lone-parent households.

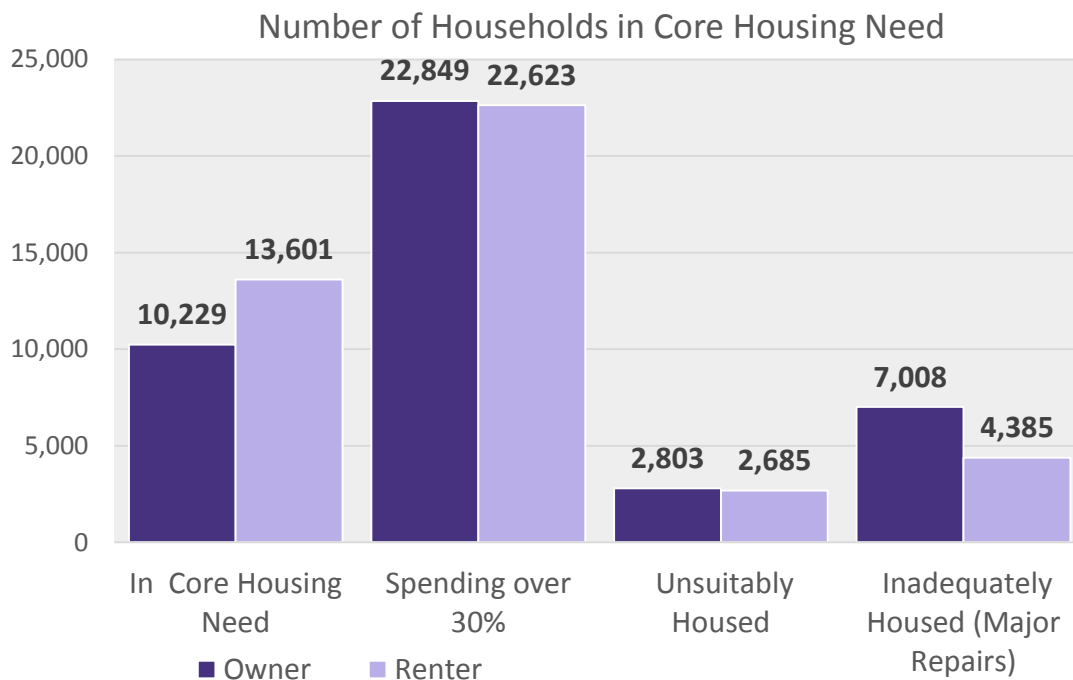
- Over 33% of single-person households are in core housing need.
- 18% of lone-parent households are in core housing need.

Breaking down housing need by tenure, we find that:

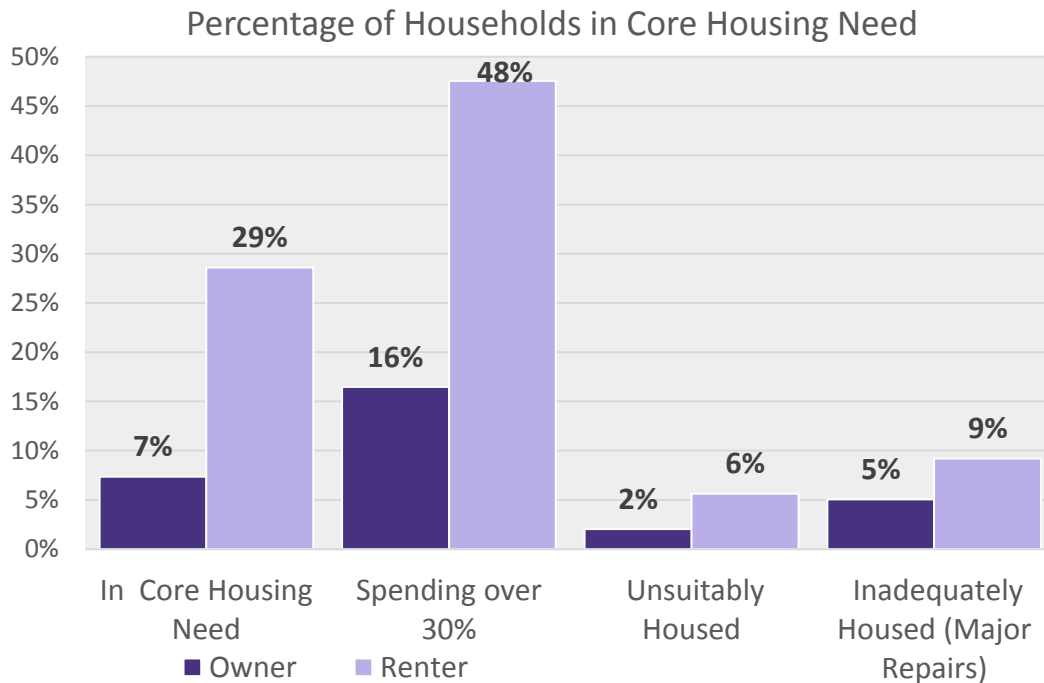
- there are more renter households in core need than owner households, despite there being about three times more owner than renter households in Niagara Region; and
- renters experience higher rates than owners of all core housing need indicators (housing unaffordability, unsuitability and inadequacy).

Of the components of core housing need, affordability is the main challenge in Niagara Region. Dwelling unsuitability and inadequacy combined affect under 10% of all households, while 24% of households spend over 30% of their total income on housing and are therefore considered to be living in unaffordable housing.

**Figure 16** Core housing need indicators by tenure (number of households), 2016



**Figure 17** Core housing need indicators by tenure (percentage of households), 2016



Core housing need affects households across all age groups, with tenure and household income level being the main determinants, as shown in Table 6 and Table 7. Almost all households in core housing need have a total household income below \$52,700 (lower 4 income deciles), meaning that the maximum they can afford to spend per month on shelter is \$1,317.<sup>10</sup> Of these, 70% of households in core need are in the lower 2 deciles. The maximum these households can spend is \$737 per month.

**Table 6** Core housing need by age of household maintainer and tenure, 2016

Age Range	# in Core Housing Need	% of Households in Core Need	Renter Households in Core Need	% Renter Households in Core Need
15 to 34	4,031	16%	2,909	24%
35 to 64	12,201	12%	6,591	27%
65+	7,598	13%	4,101	36%

<sup>10</sup> This includes all costs required to make a shelter operational, e.g. rent, mortgage payments, property taxes, condo fees, utilities, etc.

**Table 7** Households in core housing need by decile, 2016

Income Decile	Household Income level	Maximum affordable monthly housing cost	# households in Niagara in core need
Decile 1	Less than \$19,400	\$485	8,557
Decile 2	\$19,400 to \$29,499	\$737	7,545
Decile 3	\$29,500 to \$39,799	\$995	6,295
Decile 4	\$39,800 to \$52,699	\$1,317	1,429
Decile 5	\$52,700 to \$68,399	\$1,710	4
Decile 6	\$68,400 to \$84,299	\$2,107	0

Core housing need does not include homelessness. According to the Point in Time count conducted on March 27<sup>th</sup>, 2018 in Niagara Region, 625 people were experiencing homelessness in shelters, transitional housing programs and unsheltered locations. This included 144 children aged 15 or younger.

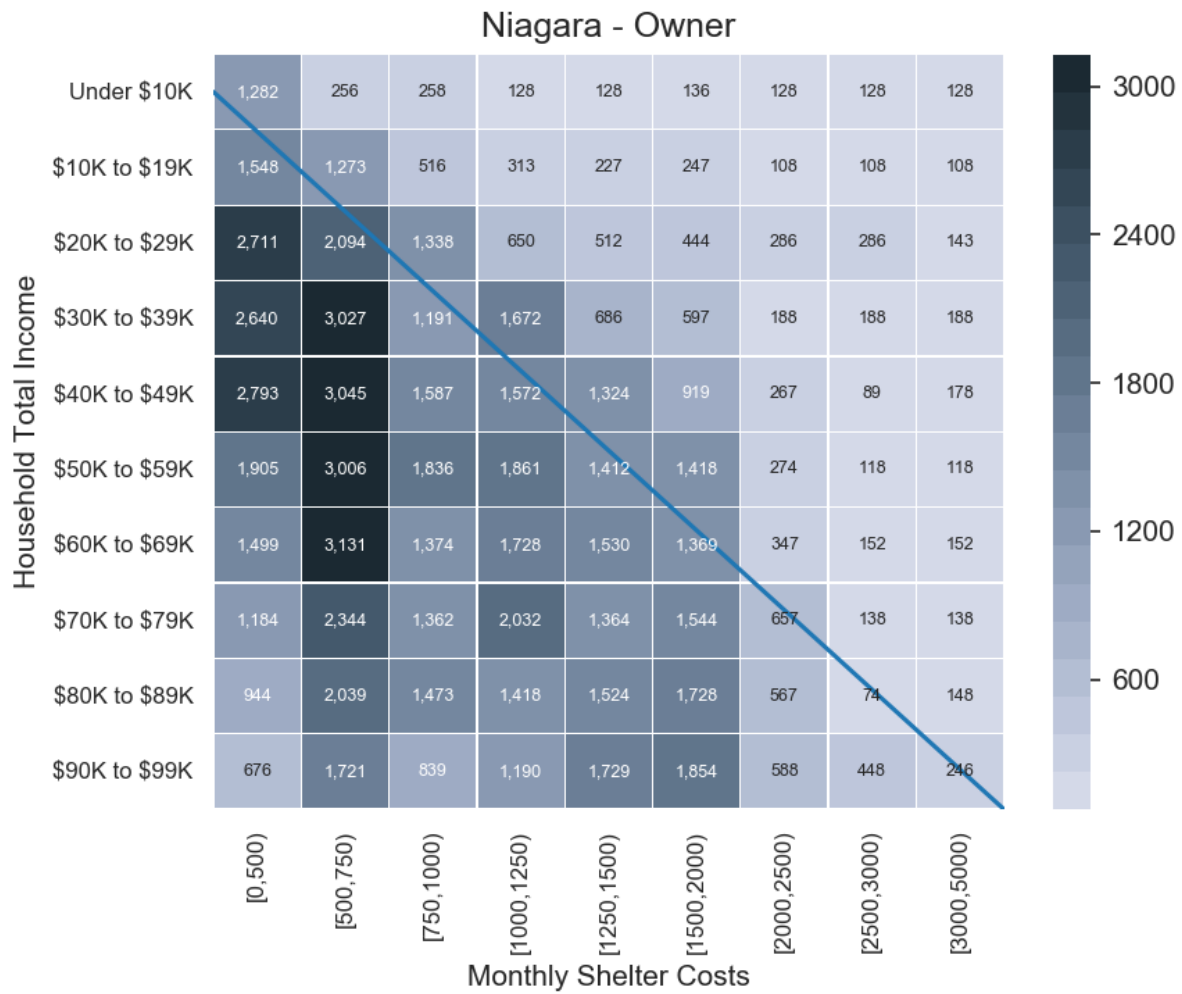
## 4.2 AFFORDABILITY

A household is considered affordably housed, according to Statistics Canada and CMHC, if it is spending less than 30% of gross income on shelter costs. This includes expenses to make shelter operational, e.g. rent, mortgage, condo fees, property taxes, and utilities. It does not include any transportation-related expenses such as car ownership or public transportation.

In the shelter affordability matrices in Figure 18 and Figure 19, household income is shown on the vertical axis and monthly shelter costs on the horizontal axis. The number in each square is the sum of households that have a specific combination of income and monthly shelter costs. The darker the square, the higher the number of households with that combination. The diagonal blue line represents the affordability threshold (shelter costs are 30% of total income), meaning that all households below the line are considered affordably housed.

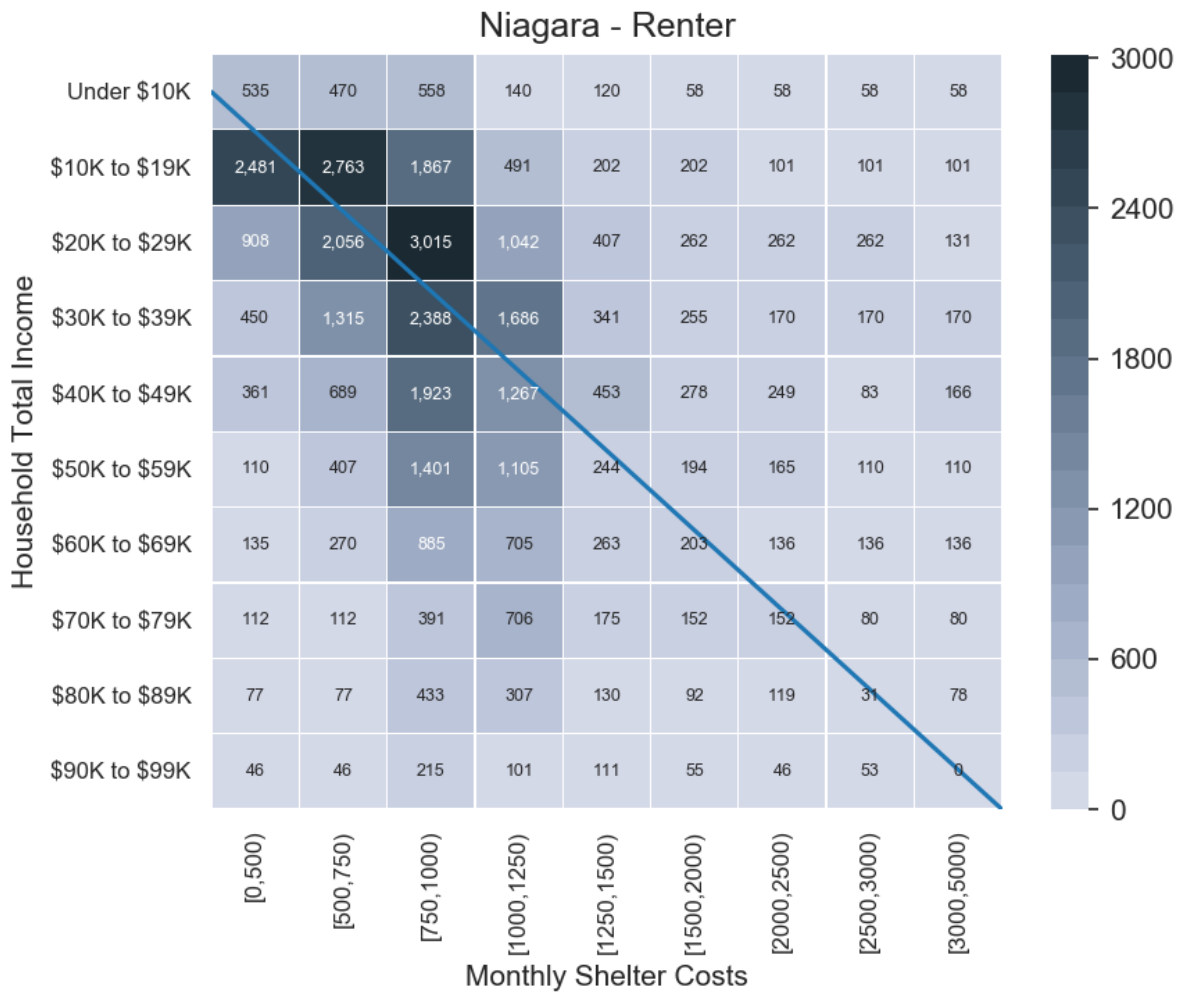
The concentration of household differs between the two figures – owner households are distributed across many income levels and are mainly found below or at the affordability threshold, while renter households are highly concentrated above the line and at household incomes below \$40,000.

**Figure 18** Affordability matrix – Owners, 2016



*Note: Only households with incomes under \$100,000 per year are included*

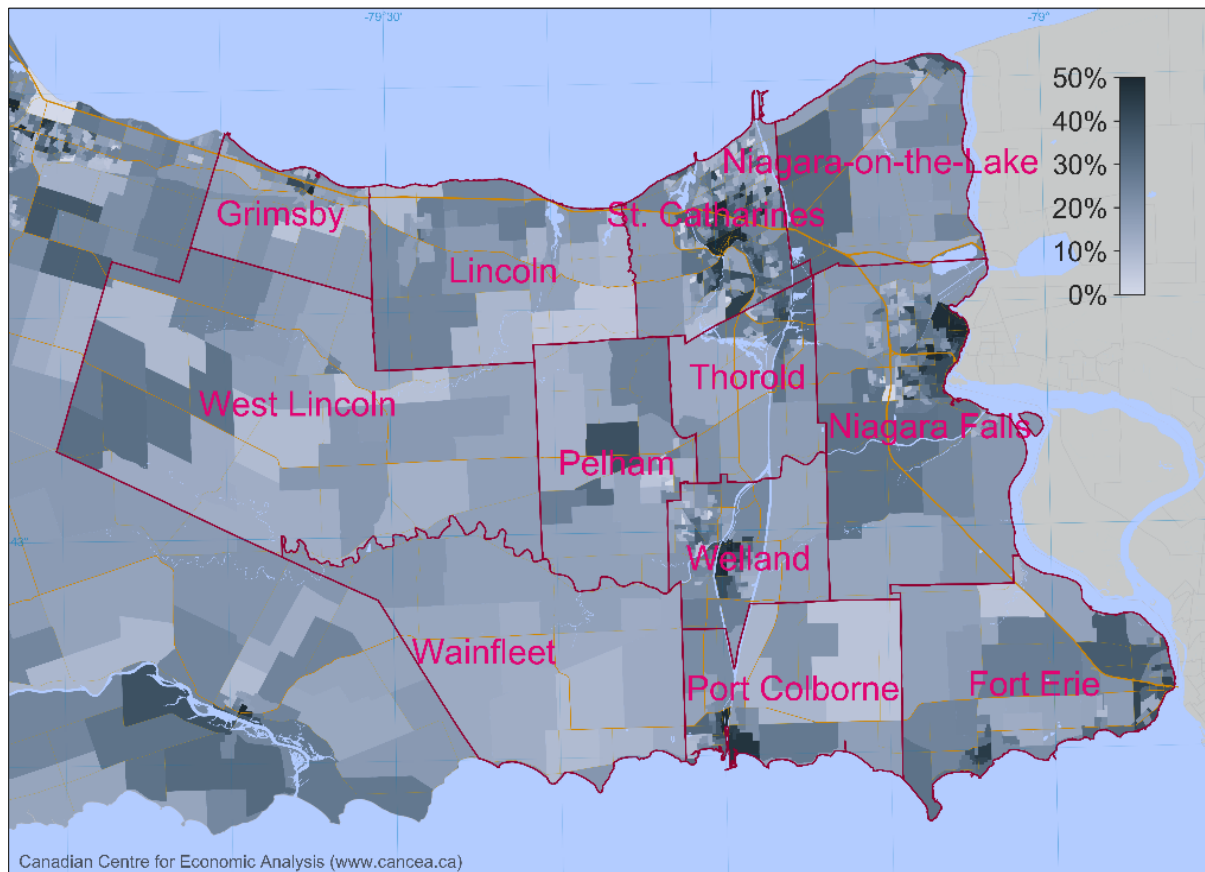


**Figure 19** Affordability matrix – Renters, 2016


*Note: Only households with incomes under \$100,000 per year are included*

Renter households in Niagara Region live in an unaffordable dwelling at higher rates than owner households. Almost half of renter households in Niagara spend over 30% of income on shelter, compared to 16% of owner households.

Households spending over 30% of income are located all over the Region but mainly concentrated in the city cores.

**Figure 20** Percentage of households spending over 30% of income on housing by DA, 2016<sup>11</sup>**Table 8** Households spending over 30% of income on shelter, 2016

Household Type	Owners	Renters
Non census family (incl. singles)	31%	58%
Lone parent	25%	49%
Couple with children	11%	30%
Couple without children	11%	33%
All Household Types	16%	48%

It is important to note that spending over 30% of household income alone does not necessarily indicate a need. For instance, some households may choose to spend a higher share of their income on housing to live in a particular dwelling or neighbourhood, or to have access to more bedrooms, despite there being an appropriate dwelling at a lower cost. Furthermore, households with lower incomes who have other

<sup>11</sup> When interpreting this map, note that DAs have a population between 400 and 700. This results in rural DAs taking up more visual space on the map, as rural municipalities have fewer DAs that are much larger in area while having approximately equivalent populations to geographically smaller DAs in city centres.

sources of wealth or low monthly expenses may also willingly choose to spend a higher share of their income on housing.

### 4.3 CONCLUDING REMARKS

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According to the most recent numbers, about 24,000 households in Niagara Region are in core housing need.

- 13,600 of these are renters.
- Affordability is the main driver of housing need in the Region for all tenures.
  - Rates of unsuitability and inadequacy are low overall.
  - Core housing need predominantly affects single-person and lone-parent households whether they rent or own, both single-earner household types, which reflects that housing need is mainly a challenge of affordability.
- Similar rates of core housing need exist across most ages of household maintainers.
  - Rates are slightly higher for households with a maintainer younger than 35 or older than 84.

Core housing need and affordability, as defined by spending 30% or more of income on shelter, have limitations:

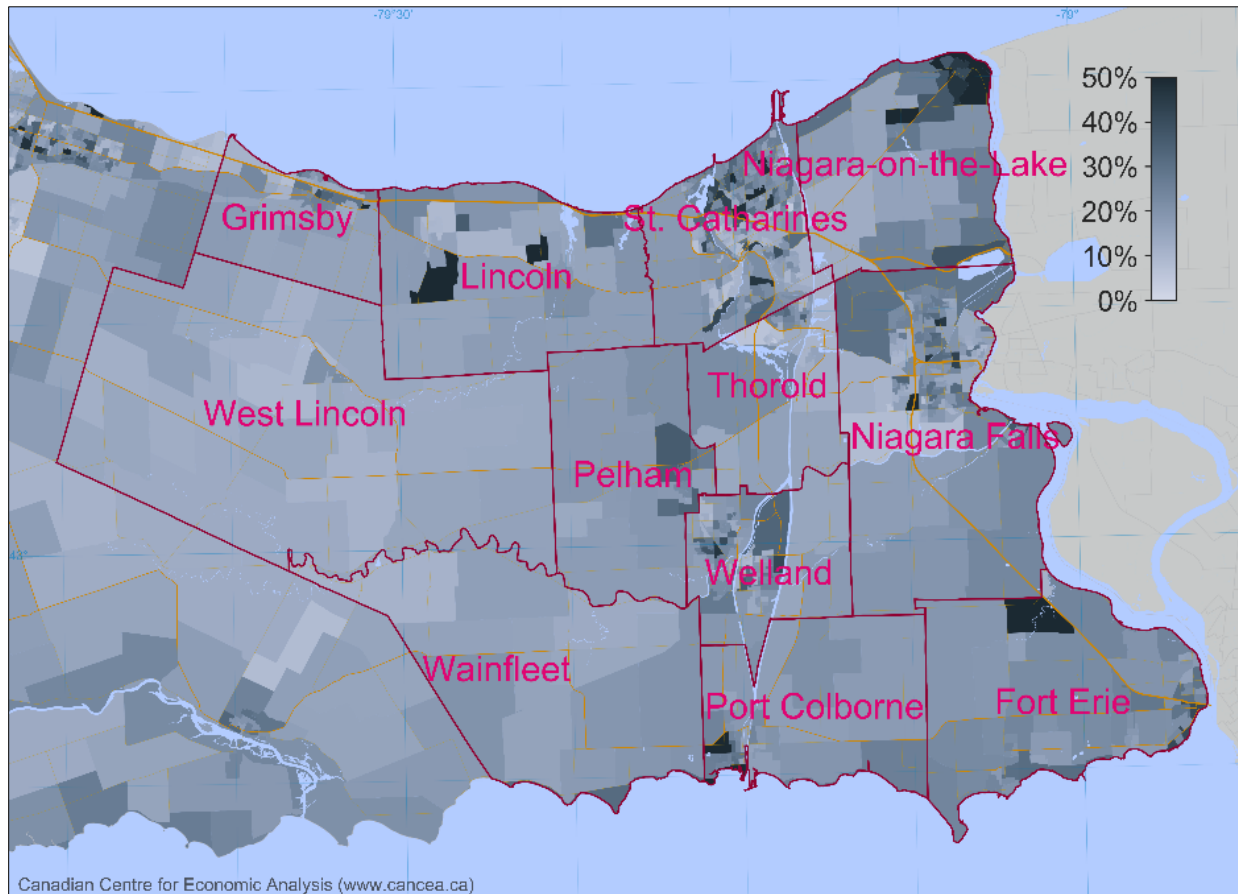
- Core housing need does not include the homeless population.
- Core housing need does not include any households living in dwellings that are not counted as dwellings by the census.
- The definition of suitability is context-dependent and may not always be a reflection of true need.
- Affordability can overstate need (some people spend more by choice).

## 5.0 SUB POPULATION FOCUS

### 5.1 OLDER ADULTS

Niagara Region's share of adults aged 65 years or older in the population is higher than the provincial average. This population resides mainly in low-density housing (71%).

**Figure 21** Share of population over 65 by dissemination area, 2016

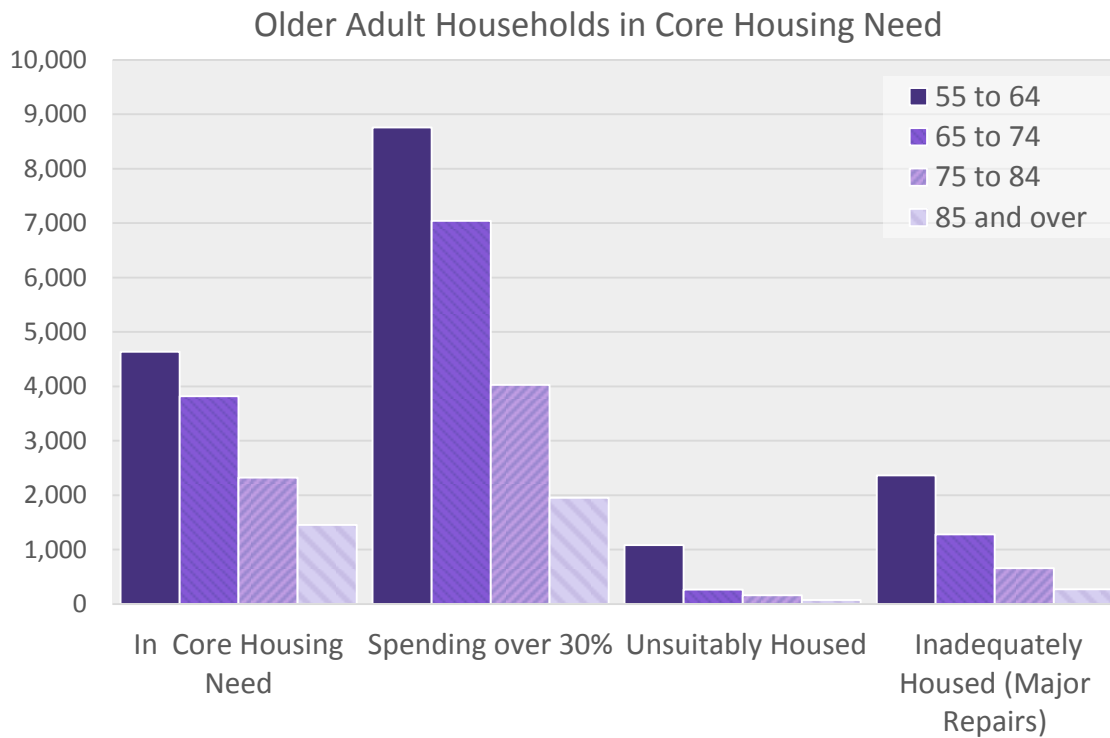


The rate of core housing need among older adults aged 65 years or older is in line with the Regional average across all age groups. Within this group, segments of the older adult population that have higher rates of core need are:

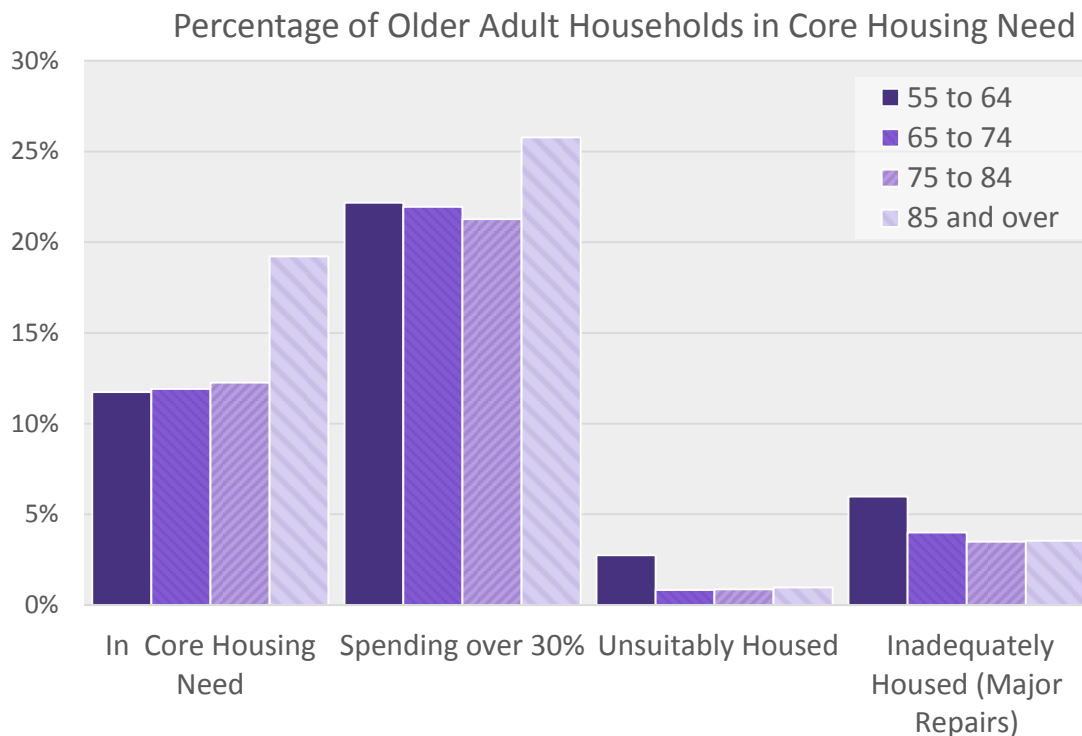
- Single-person households, who comprise 96% of all older adult households in core need in Niagara Region.
- Renter households, who are 5 times more likely to be in core housing need than owners.
- Households whose maintainer is age 85 years or older, 19% of which are considered to be in core housing need.



**Figure 22** Older adult core housing need indicators (number of households) by age, 2016



**Figure 23** Older adult core housing need indicators (percentage of households) by age, 2016



**Table 9** Percent of older adult households of given type in core housing need, 2016

Maintainer	Single Person	Census Households
55 to 64	36%	1%
65 to 74	34%	1%
75 to 84	27%	1%
85 and over	31%	2%

**Table 10** Percent of older adult households of given type spending over 30% of income on shelter, 2016

Maintainer	Single Person	Census Households
55 to 64	43%	13%
65 to 74	42%	12%
75 to 84	35%	10%
85 and over	36%	10%

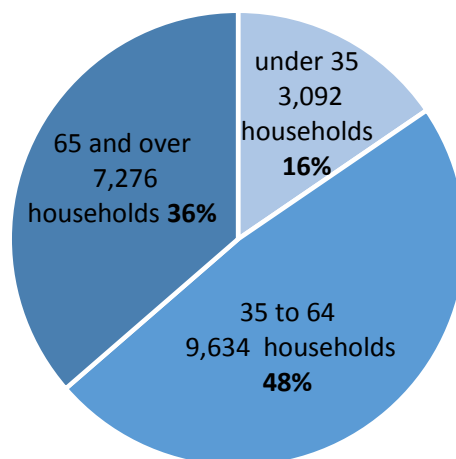
## 5.2 SINGLE-PERSON HOUSEHOLDS

Non-census households, which primarily consist of persons living alone, are the most common household type in Niagara Region. They are also the great majority of households in core need, counting 20,000 in 2016. Among these households:

- About half are between 35 and 64 years old.
- Over one third are 65 and over.
- The remainder are under 35.

**Figure 24** Single-person households in core need by age, 2016

### Core Housing Need: Single-Person Households

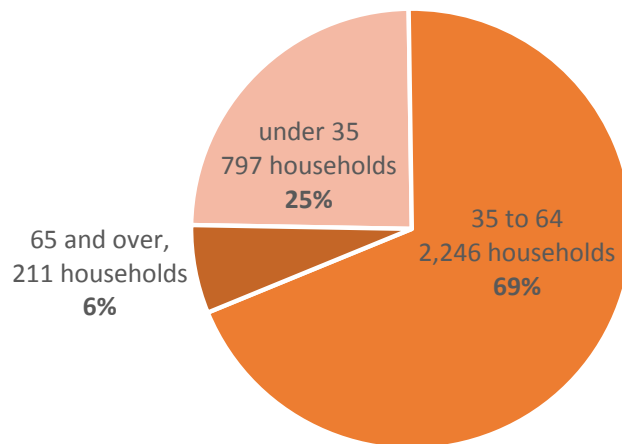


### 5.3 LONE PARENT HOUSEHOLDS

Lone-parent households are the second most likely household type to be in core need in Niagara Region. The Region counts a total of 3,250 lone-parent households in core housing need. Of these households, most are between the ages of 35 to 64, and one in four is below the age of 35.

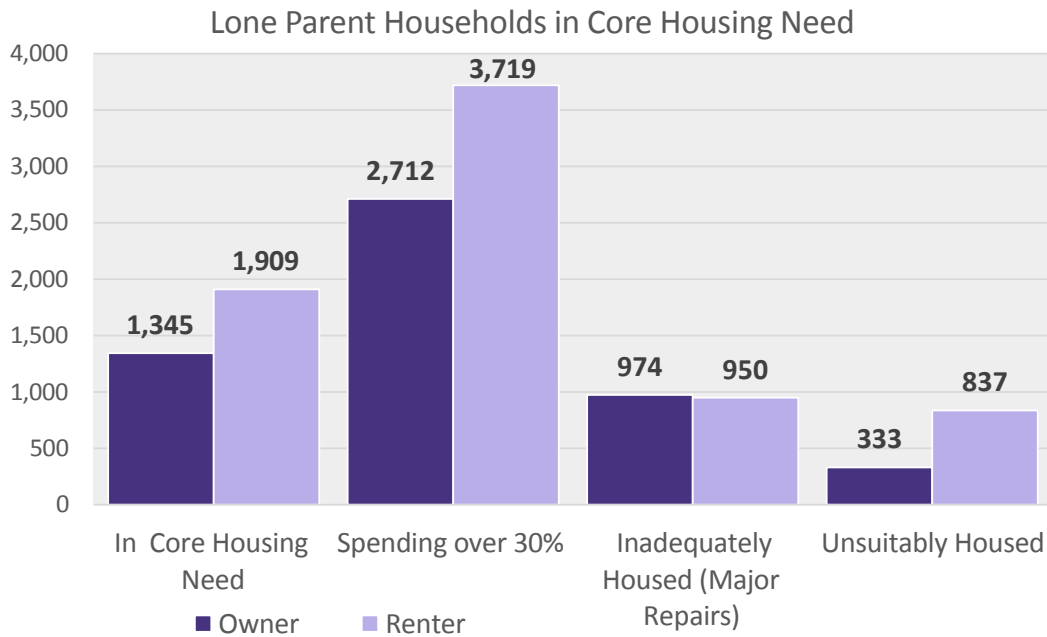
**Figure 25** Lone-parent households in core need by age, 2016

#### Core Housing Need: Lone-Parent Households

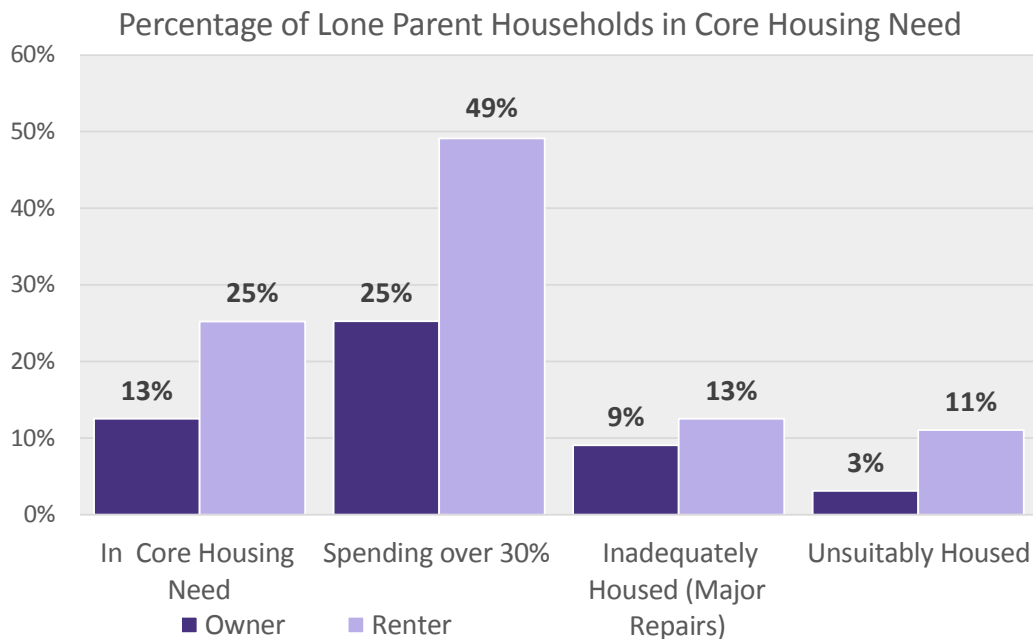


Core need and affordability are a challenge for both renter and owner households of this type, although renters have about twice the rate of core need and spending over 30% of income of their owner counterparts, as shown in Figure 26.

**Figure 26** Lone parent core housing indicators by tenure (number of households), 2016



**Figure 27** Lone parent core housing indicators by tenure (percentage of households), 2016



## 5.4 IMMIGRANT AND ABORIGINAL POPULATIONS & OTHER PRIORITY SUBGROUPS

Priority sub-populations whose housing needs Niagara Region seeks to address include immigrant and aboriginal populations, as well as persons with a disability and students. However, there exists limited publicly available data on the housing needs of immigrant and aboriginal populations at the present time,



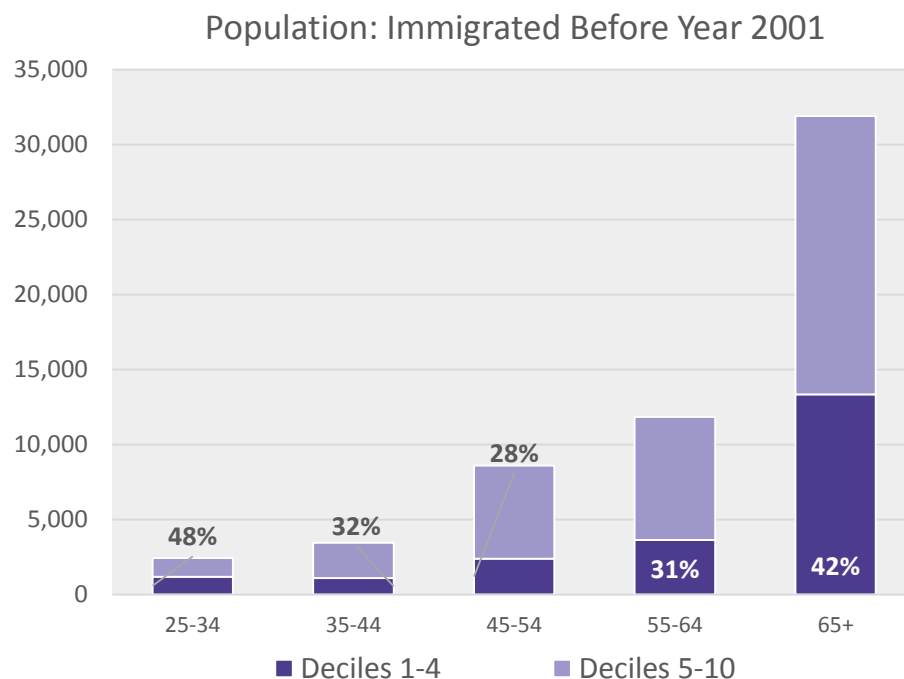
and historical census data is generally not available for many of the combinations of parameters. For these populations, forward projections are not possible. For persons with disabilities, no data regarding housing needs are presently available, since the Canadian census does not presently collect information about health and ability status. Capturing data on students presents its own set of challenges, notably because a student's permanent address may not be the same as their student address. For this reason, most census data tables are not able to distinguish students specifically, creating a significant data gap regarding their housing needs. The available data on immigrant and aboriginal subgroups' income, employment and housing needs in Niagara Region are presented below.

#### 5.4.1 IMMIGRANT POPULATION

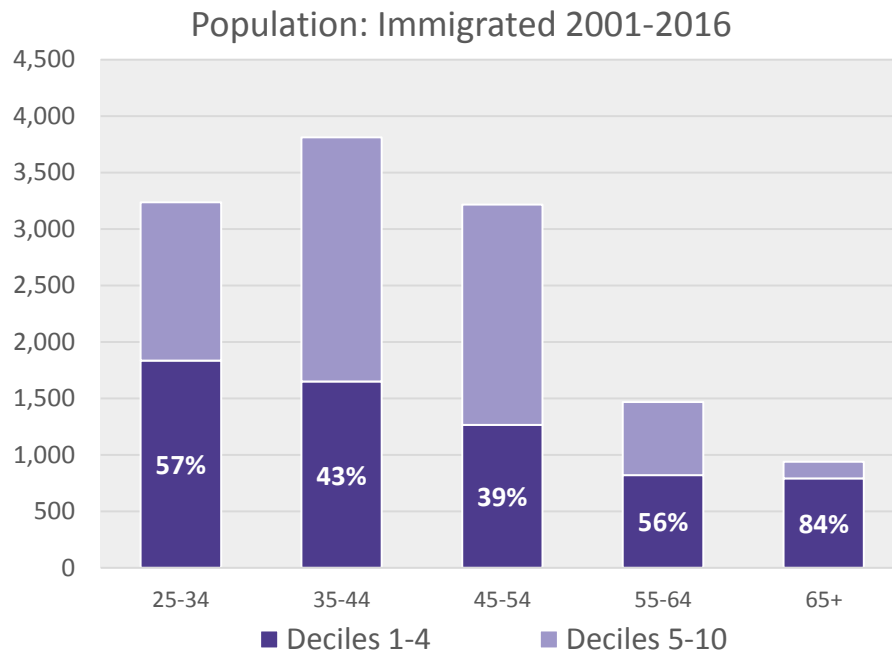
Data on immigration status are collected at the individual level, while housing data are collected at the household level, which makes it difficult to consolidate immigration status with housing need. What is available are data on date of immigration, ages, income levels, occupation types and level of education.

The immigrant population represents 18% of the total population in Niagara Region. Most of the immigrant population arrived before 1981 and is above the age of 55. The immigrant population that arrived after 2001 tends to be below the age of 55. A slightly higher percentage of immigrants who arrived prior to the year 2001 have incomes in the lower deciles than the non-immigrant population, and this difference increases as the immigration date become more recent (see Figure 28 through Figure 30).

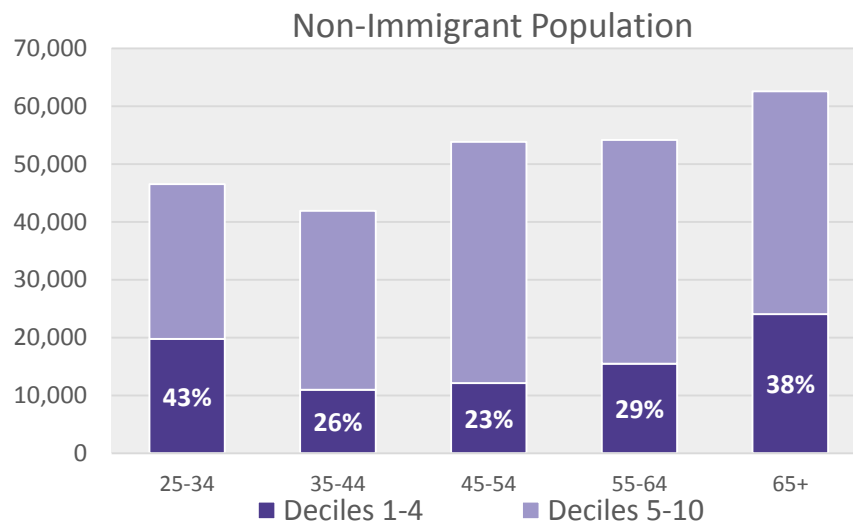
**Figure 28** Population that immigrated before year 2001 by income level, 2016



**Figure 29** Population that immigrated in year 2001 or later by income level , 2016



**Figure 30** Non-immigrant population by income level, 2016

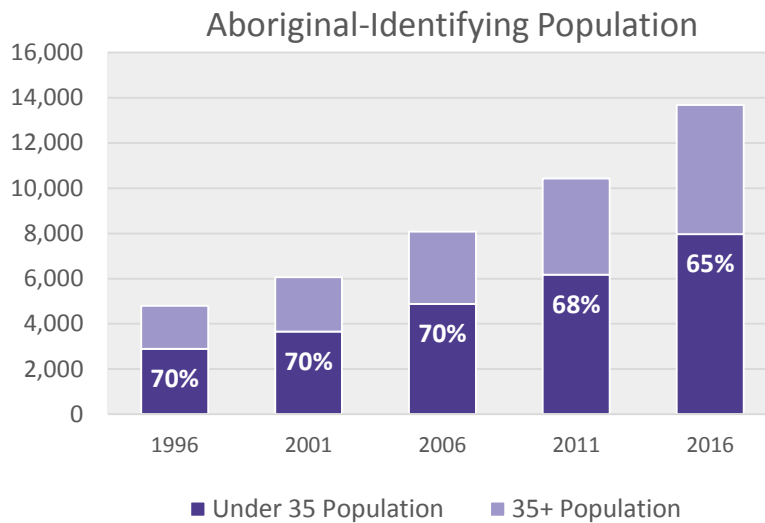


#### 5.4.2 ABORIGINAL-IDENTIFYING POPULATION

Historical census data are generally not available for many of the combinations of parameters needed to paint a complete picture of housing need among aboriginal-identifying persons. Data are available on incomes, occupations, and housing suitability. These are presented below.

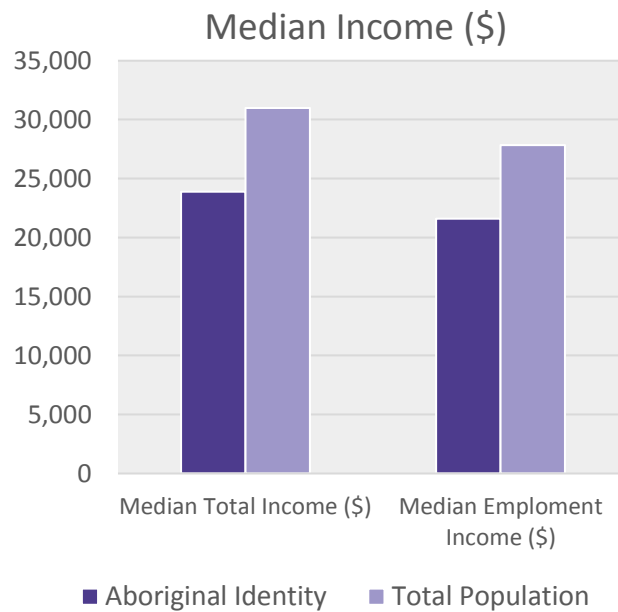
In the 2016 Census, 12,265 persons identified as aboriginal in Niagara Region. This represents 2.7% of the total population, an increase from 1.0% in 1996. This population also skews significantly younger than the general population; in 2016, 50% of the general population was under the age of 35, compared with 65% of the aboriginal-identifying population (see Figure 31).

**Figure 31** Aboriginal-identifying population by age, 1996-2016

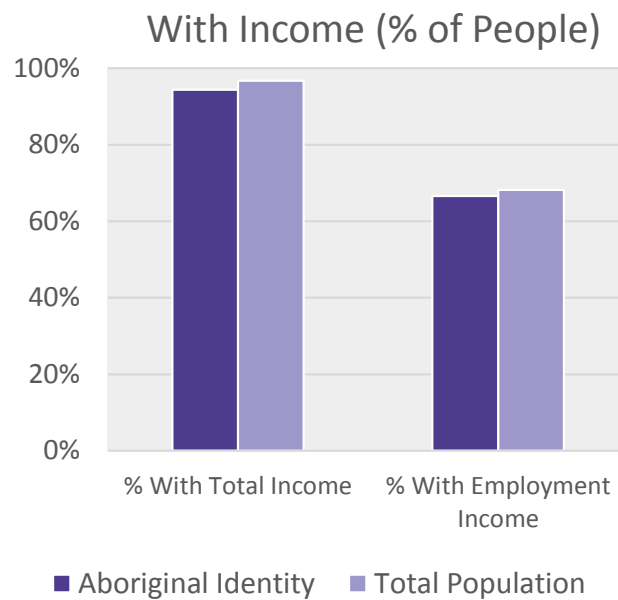


Aboriginal-identified persons have median total and employment incomes that are below the population average (as seen in Figure 32), while the shares of the aboriginal-identifying population receiving any income and employment income specifically are similar to the general population of Niagara Region (Figure 33). Relating to housing need, households with an aboriginal-identified maintainer are more likely than the general population to live in an unsuitable dwelling (i.e. with too few bedrooms). This holds true for all age groups, as shown in Figure 34.

**Figure 32** Income, aboriginal-identifying population (CMA), 2016

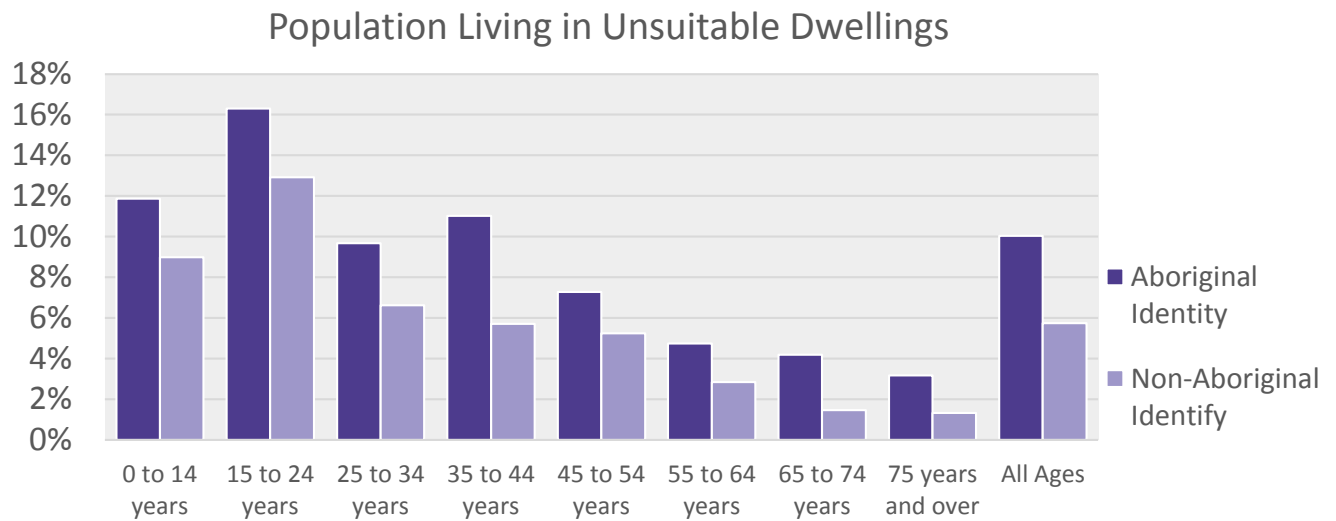


**Figure 33** Share of population with any income and employment income, (CMA), 2016





**Figure 34** Population living in unsuitable dwelling by age and aboriginal identity, 2016



## 5.5 CONCLUDING REMARKS

Many households in core need in Niagara Region are over the age of 65, as older adults represent a significant share of the total population.

Households whose maintainer is 65 years or older:

- are 7,600 of the almost 24,000 households in core housing need;
- have similar rates of core housing need as the Regional average; and
- are more likely to be in core need if they live alone, rent, and/or are 85 years or older.

Lone parent households with any number of children, followed by people living alone are most likely to be low-income under the LIM-AT measure. This corresponds to the two household types that make up the majority of households in core housing need in Niagara and highlights the challenge of finding acceptable housing on a single income.

Limited data regarding immigrant and aboriginal sub-populations are currently available, while no data are available on the housing needs of persons with disabilities in Niagara Region. Keeping these data challenges in mind, the data show that within the immigrant population:

- the income distribution of immigrants who arrived before the year 2000 most resembles the non-immigrant population in each age group;
- more recent immigrants have a higher instance of being low-income in each age group; and
- recent immigrants skew much younger than the overall population.

The aboriginal-identifying population:

- is much younger than the overall population;

- is more likely to live in unsuitable dwellings than the non-aboriginal-identifying population; and
- has a lower median income than the non-aboriginal-identifying population, while the percentage of the population receiving any income and employment income is similar.

## 6.0 CONSULTATION FEEDBACK

### 6.1 WHAT WE HEARD

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As part of this project, CANCEA presented the local housing and demographic data to each municipality to elicit feedback and gain a local perspective on the trends and patterns seen in the data.

Local housing-related issues that were common to multiple local municipalities in Niagara are reported by topic.

#### 6.1.1 POPULATION AND HOUSEHOLDS

- Minimum wage and service industry employees cannot find housing in the municipalities in which they work. Many commute from neighbouring communities. Some large employers are independently seeking ways to provide their employees with housing options.
- There is a need for more transportation infrastructure – in the larger cities, public transit is not frequent enough to provide transportation to and from work for many workers. In smaller municipalities, it does not reach the industries where people work.

#### 6.1.2 HOUSING STOCK

- In certain established neighbourhoods, there is resistance to development by long-term residents, especially to medium and high-density development. This has localized development in some municipalities to neighbourhoods that are newer or less established.
- Some smaller local municipalities that are looking to grow mentioned the costs associated with servicing land as obstacles to new development.

#### 6.1.3 HOUSING NEED

- In some municipalities that have aging hotels and motels, these are being used by residents for long-term stays. This type of housing would not be captured in the data, and residents would not be counted as being in core need or living in an inadequate dwelling. Although these provide affordable options in the housing continuum, these “units” may be highly inadequate, needing major repairs in order to meet the needs of those who live in them.
- In some municipalities, the older adult population is the primary or exclusive affordable housing policy priority.
- The definition of suitability used by CMHC and Statistics Canada was considered to be potentially ineffective at capturing how well suited a dwelling is to its inhabitants.

### 6.2 LOCAL POLICY INTERESTS

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The main housing policy interests that were brought up in the course of consultations were the following:

- Encouraging the creation of secondary suites as a way to provide additional rental housing in small and mid-sized municipalities.
- Studying the incentives for developers to create additional affordable housing stock.
- Finding ways to overcome local reluctance towards mixed-density development.
- Discussing the importance of infrastructure investment and other creative servicing solutions.

### 6.3 DATA GAPS

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In conversation with Niagara Region's local municipalities, the following were identified as relevant data gaps that, if filled, can help create a more complete picture of the local housing situation.

- The use of short-term rentals (such as Airbnb): this could affect rental and ownership rates seen in the data in certain communities with active tourism industries.
- The use of motels as long-term, low-cost accommodations: understanding the number and characteristics of the households that are housed in this way, as well as the features of these units, can add to the discussion of housing need.
- Housing-specific data on particular priority subgroups, e.g. student, aboriginal, disabled, and immigrant populations.
- Recent development in communities that have experienced significant growth since the last census and its effects on housing stock and prices.<sup>12</sup>

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<sup>12</sup> Market prices and rents were added to the analysis as a result of these consultations.



## 7.0 KEY TAKE-AWAYS

- Niagara Region currently has about 24,000 households in core housing need. The key sub-groups most affected include:
  - Renter households, 29% of which are in core housing need in the Region;
  - Singles, who represent 84% of the 24,000 households in core need;
  - Lone parents, who represent 14% of the households in core need; and
  - Low-income households, specifically in deciles 1-4 who earn less than \$52,700 per year.
- The types of housing needed by most households in core need are:
  - Bachelor apartments and one-bedroom units for single-person households;
  - 2 or more bedroom, family-friendly units for lone-parent households; and
  - Affordable housing – spending \$737 a month on shelter is unaffordable for 70% of all households in core need.
- The Region's aging population which is likely to increasingly skew older will also affect future housing demand and housing need. The type of dwellings commonly considered appropriate for this population would be 1-bedroom, senior-friendly accessible housing, suitable for couples and single-person households. Transportation and location within the community may also be important considerations.
- At the local level, an effective housing strategy requires considering how economic and infrastructure policy interacts with housing.
  - The type and location of housing development can affect the ability to attract labour to the area, especially for industries requiring minimum-wage labour.
  - Transportation infrastructure can ease labour mobility and widen the radius for people to find housing.
  - Policies targeting housing, transportation and the economy can affect the type of growth that the Region will experience and can either exacerbate trends identified or work to minimize them.

## A. APPENDIX: COMPARISON TABLES

### A.1. WITHIN NIAGARA REGION

#### POPULATION AND HOUSEHOLDS

	Niagara Falls	St. Catharines	West Lincoln	Welland	Fort Erie	Thorold	Regional Average
Population growth rate (2016-2041)	41%	24%	96%	24%	40%	50%	<b>34%</b>
Household growth rate (2016-2041)	46%	31%	99%	30%	46%	56%	<b>40%</b>
Expected number of added residents, thousands (2016-2041)	36.3	32.9	14.08	12.70	12.44	9.54	<b>156.0</b>
Expected number of added households, thousands (2016-2041)	16.9	17.2	5.94	6.50	5.82	4.42	<b>74.7</b>
Share of Regional growth borne by municipality	22.7%	23.0%	7.9%	8.7%	7.8%	5.9%	<b>100%</b>
Under 25 population growth rate (2016-2041)	24%	8%	83%	9%	24%	36%	<b>19%</b>
65 and over population growth rate (2016-2041)	117%	93%	193%	89%	108%	139%	<b>105%</b>
Dependency ratio (2016)	52%	54%	51%	54%	58%	44%	<b>55%</b>
Most common household type (2016)	Singles	Singles	Couple with children	Singles	Couple no children	Singles	<b>Singles</b>
Proportion of households with a maintainer aged 65 and over (2016)	30%	31%	26%	31%	34%	25%	<b>31%</b>

# Niagara Region Housing Market Analysis

	Grimsby	Niagara-on-the-Lake	Pelham	Lincoln	Port Colborne	Wainfleet	Regional Average
Population growth rate (2016-2041)	34%	51%	47%	32%	17%	13%	<b>34%</b>
Household growth rate (2016-2041)	39%	57%	51%	37%	23%	16%	<b>40%</b>
Expected number of added residents, thousands (2016-2041)	9.35	8.94	8.05	7.81	3.09	0.83	<b>156.0</b>
Expected number of added households, thousands (2016-2041)	4.37	4.09	3.60	3.65	1.77	0.43	<b>74.7</b>
Share of Regional growth borne by municipality	5.9%	5.5%	4.8%	4.9%	2.4%	0.6%	<b>100%</b>
Under 25 population growth rate (2016-2041)	20%	26%	27%	16%	0%	3%	<b>19%</b>
65 and over population growth rate (2016-2041)	107%	116%	119%	107%	78%	71%	<b>105%</b>
Dependency ratio (2016)	56%	72%	62%	59%	59%	49%	<b>55%</b>
Most common household type (2016)	Couple with children	Couple no children	Couple no children	Couple with children	Singles	Couple no children	<b>Singles</b>
Proportion of households with a maintainer aged 65 and over (2016)	29%	43%	35%	32%	34%	28%	<b>31%</b>

## EMPLOYMENT &amp; HOUSING

	Niagara Falls	St. Catharines	West Lincoln	Welland	Fort Erie	Thorold	Regional Average
<b>Employment &amp; Income</b>							
Average individual income (2016)	\$37,869	\$38,963	\$44,967	\$37,126	\$40,389	\$37,745	<b>\$41,591</b>
Median individual income (2016)	\$29,275	\$30,110	\$36,591	\$29,856	\$30,591	\$30,912	<b>\$31,433</b>
Average 15+ population full-time employment (2016)	31%	30%	41%	30%	30%	35%	<b>32%</b>
Average 15+ population not working (2016)	36%	38%	27%	41%	41%	32%	<b>37%</b>
Expected change in full time employed 15+ population (2016-2041)	22%	7%	79%	8%	20%	34%	<b>17%</b>
Expected change in non-working 15+ population (2016-2041)	76%	55%	143%	50%	72%	86%	<b>67%</b>
<b>Housing Stock &amp; Demand</b>							
Median price, single-detached home (2016)	\$260,041	\$280,193	\$399,756	\$229,411	\$229,712	\$259,834	<b>\$298,208</b>
Median price, other (excluding 5+ storey and mobile)	\$200,452	\$210,341	\$299,384	\$185,858	\$232,654	\$224,261	<b>\$240,412</b>
Average 1-bedroom rent (2016)	\$807	\$831	N/A	\$757	\$723	\$693	<b>\$801 (CMA)</b>
Rent increase, 1-bedroom (2006-2016)	28%	25%	N/A	27%	24%	21%	<b>26% (CMA)</b>
Low-density housing stock	72%	63%	90%	72%	85%	79%	<b>73%</b>
Medium-density housing stock	24%	26%	10%	21%	13%	19%	<b>22%</b>
High-density housing stock	4%	11%	0%	7%	2%	2%	<b>5%</b>
% Ownership	72%	67%	90%	70%	79%	73%	<b>74%</b>
% Renters	28%	33%	10.3%	30%	21%	27%	<b>26%</b>
% Core housing need	14%	16%	4%	16%	14%	12%	<b>13%</b>
% Spending over 30% of income on shelter	26%	28%	17%	26%	25%	25%	<b>24%</b>



Niagara Region Housing Market Analysis

	Grimsby	Niagara-on-the-Lake	Pelham	Lincoln	Port Colborne	Wainfleet	Regional Average
<b>Employment &amp; Income</b>							
Average individual income (2016)	\$53,634	\$53,633	\$55,892	\$50,311	\$39,282	\$46,750	<b>\$41,591</b>
Median individual income (2016)	\$41,527	\$37,208	\$41,313	\$37,821	\$29,977	\$34,498	<b>\$31,433</b>
Average 15+ population full-time employment (2016)	38%	28%	32%	37%	28%	39%	<b>32%</b>
Average 15+ population not working (2016)	31%	39%	36%	30%	42%	31%	<b>37%</b>
Expected change in full time employed 15+ population (2016-2041)	17%	27%	25%	14%	-1%	1%	<b>17%</b>
Expected change in non-working 15+ population (2016-2041)	76%	91%	89%	79%	45%	37%	<b>67%</b>
<b>Housing Stock &amp; Demand</b>							
Median price, single-detached home (2016)	\$449,564	\$500,714	\$400,196	\$400,101	\$200,065	\$300,656	<b>\$298,208</b>
Median price, other (excluding 5+ storey and mobile)	\$334,955	\$401,199	\$300,758	\$299,958	\$199,835	\$329,452	<b>\$240,412</b>
Average 1-bedroom rent (2016)	\$768	N/A	N/A	\$643	\$728	N/A	<b>\$801 (CMA)</b>
Rent increase, 1-bedroom (2006-2016)	19%	N/A	N/A	2%	N/A	N/A	<b>26% (CMA)</b>
Low-density housing stock	71%	87%	84%	81%	75%	99%	<b>73%</b>
Medium-density housing stock	27%	13%	15%	19%	22%	1%	<b>22%</b>
High-density housing stock	2%	0%	1%	1%	3%	0%	<b>5%</b>
% Ownership	86%	88%	89%	87%	74%	94%	<b>74%</b>
% Renters	14%	12%	11%	13%	26%	6%	<b>26%</b>
% Core housing need	6%	6%	5%	4%	17%	5%	<b>13%</b>
% Spending over 30% of income on shelter	18%	20%	15%	16%	25%	16%	<b>24%</b>

## A.2. NEIGHBOURING MUNICIPALITIES

### POPULATION & HOUSEHOLDS

	Haldimand-Norfolk	Hamilton	Peel	Halton	Toronto	Niagara Region
<b>Population and Households</b>						
Population growth rate (2016-2041)*	10%	39%	34%	76%	18%	<b>34%</b>
Household growth rate (2016-2041)	13%	43%	38%	81%	22%	<b>40%</b>
Expected number of added residents, thousands (2016-2041)	11.0	219	501	431	529	<b>156</b>
Expected number of added households, thousands (2016-2041)	5.89	95.8	175	162	258	<b>74.7</b>
Under 25 population growth rate (2016-2041)	1%	22%	22%	61%	13%	<b>19%</b>
65 and over population growth rate (2016-2041)	67%	131%	116%	180%	52%	<b>105%</b>
Dependency ratio (2016)	58%	50%	45%	53%	43%	<b>55%</b>
Most common household type (2016)	Family with children	Family with children	Family with children	Family with children	Non-census family	<b>Non-census family</b>
Proportion of households with a maintainer aged 65 and over (2016)	32%	22%	20%	24%	23%	<b>31%</b>

*Note: Growth is based on Places to Grow targets*

## EMPLOYMENT &amp; HOUSING

	Haldimand-Norfolk	Hamilton	Peel	Halton	Toronto	Niagara Region
<b>Employment &amp; Income</b>						
Average individual income (2016)	\$41,731	\$43,966	\$42,651	\$64,762	\$52,268	<b>\$41,591</b>
Median individual income (2016)	\$33,265	\$32,917	\$30,715	\$42,577	\$30,089	<b>\$31,433</b>
Average 15+ population full-time employment (2016)	34%	34%	35%	40%	33%	<b>32%</b>
Average 15+ population not working (2016)	35%	35%	32%	28%	35%	<b>37%</b>
<b>Housing Stock &amp; Demand</b>						
Median price, single-detached home (2016)	\$288,920	\$400,815	\$697,183	\$738,304	\$800,687	<b>\$298,208</b>
Median price, other (excluding 5+ storey and mobile)	\$230,095	\$324,885	\$479,570	\$473,364	\$601,891	<b>\$240,412</b>
Average 1-bdr rent 2016	n/a	\$810	\$1,101	\$1,160	\$1,137	<b>\$801 (CMA)</b>
Low-density housing stock	87%	60%	57%	64%	31%	<b>73%</b>
Medium-density housing stock	12%	24%	24%	25%	25%	<b>22%</b>
High-density housing stock	1%	16%	19%	11%	44%	<b>5%</b>
% Ownership	81%	68%	76%	81%	53%	<b>74%</b>
% Renters	19%	32%	24%	19%	47%	<b>26%</b>
% Core housing need	9%	15%	16%	9%	24%	<b>13%</b>
% Spending over 30% of income on shelter	19%	26%	32%	24%	36%	<b>24%</b>

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## MEMORANDUM

PDS-C 13-2019

**Subject: 2019 Public Realm Investment Program Funding Commitment Update**

**Date: July 9, 2019**

**To: Planning and Economic Development Committee**

**From: Vanessa Aykroyd, Landscape Architect**

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The purpose of this memorandum is to provide an update to the Planning and Economic Development Committee with respect to the “**2019 Public Realm Investment Program (PRIP)**.” This memo summarizes the results of the 2019 PRIP applications for funding from Local Area Municipalities (LAMs) for public realm enhancement projects along Regional Roads. A brief description of each project is included.

### Program Background

The Public Realm Investment Program was initiated in 2016, as a means to incentivize LAMs to make strategic investments in partnership with the Region in the public realm that contribute to attractive and vibrant places. These projects stimulate investment and contribute to elevating the quality and appeal of the public realm across Niagara. Eligible projects include streetscaping, street furnishing, civic gateways, urban plazas, active transportation facilities, and other related public realm enhancements.

With an annual budget of \$250,000, the PRIP provides matching funding to LAMs for public realm enhancement projects up to a maximum of \$100,000 per project. Now in its fourth year, the program continues to build on the successes of past years and is well-received by the LAMs.

### 2019 Funding Commitments

In February of this year, the 2019 Program Application Package and supporting material was distributed to the LAMs with encouragement to submit projects that met the eligibility criteria. Multiple projects may be submitted as separate funding requests. A commitment by the LAM to the maintenance of spaces and elements funded through this program is required.

The deadline for submissions to the 2019 PRIP was March 29, 2019. Similar to previous years, the 2019 Program was over-subscribed with a total funding request of \$467,500. Six projects were submitted from four LAMs. Combined, the requested funding leverages a total project value of \$1.57 million.



A multi-disciplinary team of Regional staff evaluated the projects to determine funding priorities. Staff also met directly with LAMs to discuss the projects in detail. The team collaboratively determined how to best leverage the funding in order to maximize the potential of the projects. The Region also provides various technical and design assistance in landscape architecture and streetscape design to the LAMs.

The following projects have received 2019 PRIP funding commitments:

<b>Project Name and Description</b>	<b>Local Commitment</b>	<b>Regional Commitment</b>
<b>West Lincoln:</b> <b>Smithville – RR 20 Streetscaping Upgrades</b> Creation of a parkette at the corner of West/ Griffin & Station Street, upgraded landscaping in new roundabouts at Townline Road and South Grimsby Road 6, street furniture (benches, and seasonal lighting at key nodes along the route). Transformation of these spaces builds upon previous Regional streetscape investments in the public realm.	\$100,000	\$100,000
<b>West Lincoln:</b> <b>Smithville – RR 20 Street Lighting Upgrades</b> Upgraded street lighting that will eliminate overhead utility clutter, while creating a consistent and distinct design identity for the community of Smithville.	\$130,000	\$100,000
<b>Pelham:</b> <b>Port Robinson and Rice Road (RR 54) Parkette</b> New parkette along a multi-use trail in the new neighbourhood of East Pelham.	\$30,000	\$30,000
<b>Welland:</b> <b>Parkette at Hellems and East Main Street (RR27)*</b> Parkette in a vacant lot owned by the City. *Funding to be committed when project details are defined.	\$55,000	\$20,000
<b>Total:</b>	<b>\$315,000</b>	<b>\$250,000</b>

The Region received additional funding requests this year, but was unable to provide committed funding. These requests are outlined below.

- (1) The City of St Catharines submitted an application for \$100,000 for an urban plaza along St. Paul Street at the Rankin Bridge leading to the Meridian Centre.

While the project is worthwhile and impactful to the community, it does not meet the program eligibility requirements as the project is not adjacent to a Regional road.

- (2) The City of Welland submitted an application for \$100,000 for the reconstruction of the streetscape of Niagara Street from West Main Street to the Niagara Street Bridge. There are larger capital works planned along this section of road in 2021, namely the rehabilitation of the Niagara Street Bridge and major infrastructure renewal along Niagara Street. Therefore, the evaluation team determined that this project should be re-submitted at a later date in coordination with these planned works.

Planning staff will update the Planning and Economic Development Committee in the fall of 2019 with a report showcasing the public realm investment projects that the program has helped to fund since 2016.

Respectfully submitted and signed by

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Vanessa Aykroyd, OALA, CSLA  
Landscape Architect