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

Report to: Planning and Economic Development Committee

Report date: Wednesday, July 10, 2019

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%
Total new initiatives	18,748,465	5.12%

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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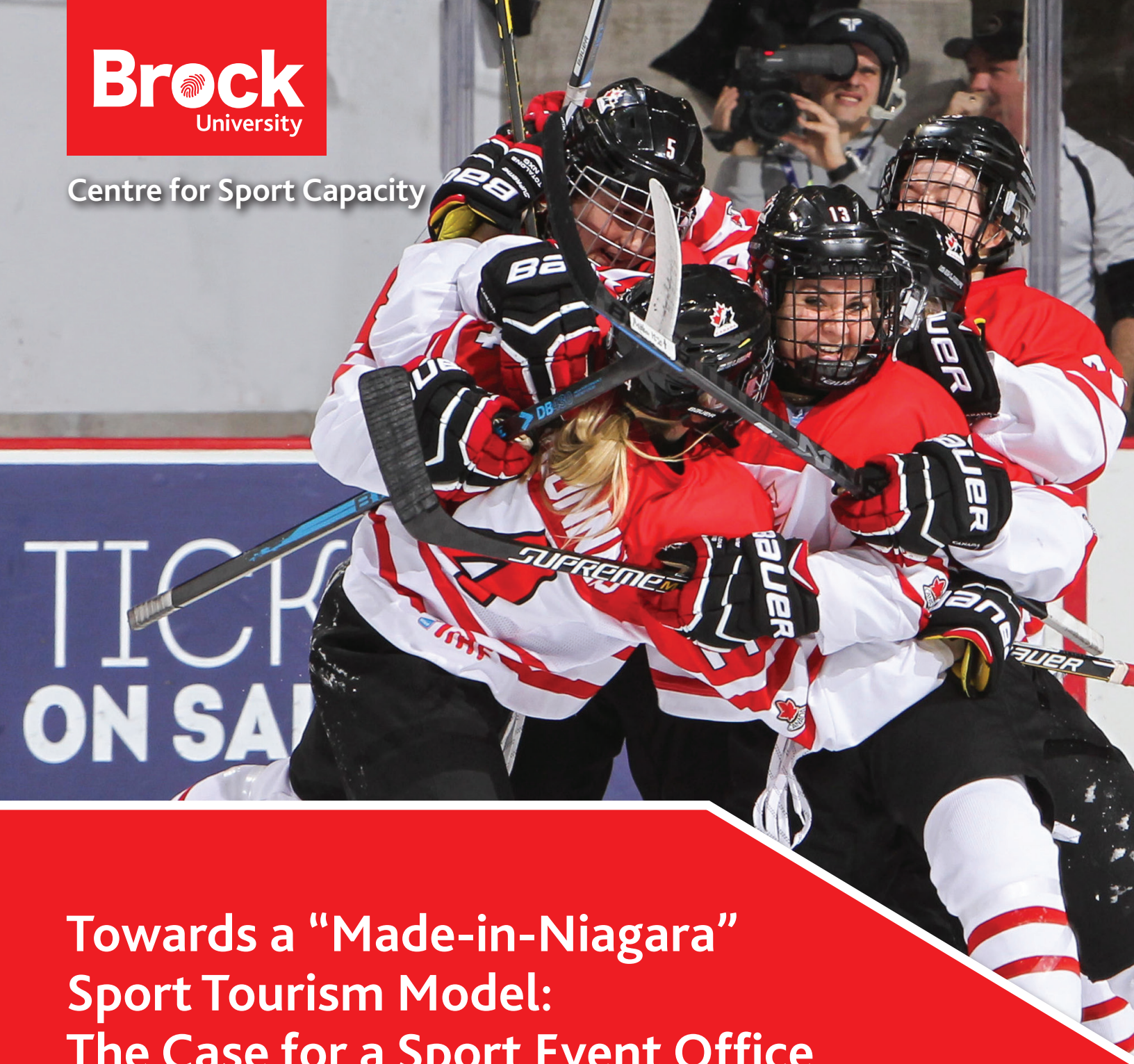
Submitted by:

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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

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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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:

- | | |
|---------------------------|--|
| Theme 1: | Sport tourism is an important contributor to the Niagara economy. |
| Recommendation #1: | The Niagara Region recognizes sport tourism as a key component of future economic development initiatives. |
| Theme 2: | Niagara needs a central, region-wide sport event office. |
| Recommendation #2: | An arm's-length sport event office be established. |
| Theme 3: | A sport event office requires sustained operational and bid funding. |
| 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. |
| 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. |
| Recommendation #6: | 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

STRUCTURE	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.
GOVERNMENT ACCOUNTABILITY	No municipal representation – elected councillors sat on the NSC board but officially represented neither the Regional Municipality of Niagara, nor an area municipality.
STAFFING	As of 2017: 3 FTE, 2 x 0.5 FTE
BUDGET	Not available
FUNDING SOURCES	Fee-for-service, grants, advertising
SERVICES	Sport event hosting and community development - event bidding, event management, marketing, community relations; sport development, advocacy.
MISSION STATEMENT	“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.”
EVENTS	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?
Saskatoon Sports Tourism Pop. 295,095 GSI Rank Mid-Size: 1st	Tourism Saskatoon (DMO)
Richmond Sport Hosting Pop. 198,309 GSI Rank Mid-Size: 2nd	City of Richmond
Events Regina 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
Sport Tourism Office, Kingston Pop. 295,095 GSI Rank Mid-Size: 4th	Tourism Kingston (DMO)
Business Events Toronto Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Tourism Toronto (DMO/RTO)
Sport Tourism Office, Hamilton Pop. 536,917 GSI Rank 500k+: 8th	City of Hamilton (DMO) through tourism and culture division.
Sport Tourism, London Pop. 494,069 GSI Rank Mid-Size: 15th	Tourism London (DMO)
Sport Durham Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Durham Region (DMO) through Durham Tourism offices of Planning & Economic Development
Buffalo-Niagara Sports Commission 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
Saskatoon Sports Tourism 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.
Richmond Sport Hosting 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.
Events Regina 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.
Sport Tourism Office, Kingston 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.
Business Events Toronto Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Separate	Operates as a private not-for-profit.
Sport Tourism Office, Hamilton Pop. 536,917 GSI Rank 500k+: 8th	Direct	Tourism is within the city’s economic development department.
Sport Tourism, London 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.
Sport Durham Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Direct	Durham Region (DMO) through Durham Tourism offices of Planning & Economic Development
Buffalo-Niagara Sports Commission 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
Saskatoon Sports Tourism 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.
Richmond Sport Hosting 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).
Events Regina Pop. 236,481 GSI Rank Mid-Size: 3rd	Bid assistance, event attraction.
Sport Tourism Office, Kingston Pop. 295,095 GSI Rank Mid-Size: 4th	Help plan and organize events, bid development, accommodations, venues coordination, marketing.
Business Events Toronto 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.
Sport Tourism Office, Hamilton Pop. 536,917 GSI Rank 500k+: 8th	Incentive funding for not-for-profit organizations, bid assistance, sport facilities/accommodations assistance.
Sport Tourism, London Pop. 494,069 GSI Rank Mid-Size: 15th	Bid development, accommodation and venue coordination, event marketing, city logistics, food services, transportation coordination, volunteer recruitment.
Sport Durham Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	Accommodation/venue coordination, event promotion, transportation and catering assistance.
Buffalo-Niagara Sports Commission 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
Saskatoon Sports Tourism Pop. 295,095 GSI Rank Mid-Size: 1st	Y (voluntary DMP 3%)
Richmond Sport Hosting Pop. 198,309 GSI Rank Mid-Size: 2nd	Y (MRDT 3%)
Events Regina Pop. 236,481 GSI Rank Mid-Size: 3rd	Y (voluntary DMF 3%)
Sport Tourism Office, Kingston Pop. 295,095 GSI Rank Mid-Size: 4th	Y (MAT 4%)
Business Events Toronto Pop. 4.05 million (incl. Mississauga & Brampton) GSI Rank 500k+: 4th	Y (MAT 5%)
Sport Tourism Office, Hamilton Pop. 536,917 GSI Rank 500k+: 8th	Y (voluntary DMP 3%)
Sport Tourism, London Pop. 494,069 GSI Rank Mid-Size: 15th	Y (4%)
Sport Durham Pop. 645,862 GSI Rank Mid-Size: 17th (Oshawa)	N
Buffalo-Niagara Sports Commission 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
Saskatoon Sports Tourism 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"
Richmond Sport Hosting 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
Events Regina Pop. 236,481 GSI Rank Mid-Size: 3rd	DMF	1 – Manager; DMO employee	\$150,000 plus salaries
Sport Tourism Office, Kingston 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)
Business Events Toronto 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
Sport Tourism Office, Hamilton 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
Sport Tourism, London 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
Sport Durham 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)
Buffalo-Niagara Sports Commission 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
Saskatoon Sports Tourism 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
Richmond Sport Hosting 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)
Events Regina 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
Sport Tourism Office, Kingston 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
Business Events Toronto 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
Sport Tourism Office, Hamilton 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
Sport Tourism, London 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
Sport Durham 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)
Buffalo-Niagara Sports Commission 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.

“... 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.”

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).

“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.”

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.

"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."

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.

“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.”

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.

“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.”

“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.”

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.

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Helpful Resources:

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

