the research team was unable to value volunteerism in Niagara’s cultural sector in this study. Given the importance of the volunteer sector to the cultural industries in Niagara (and the rest of Canada), further research should be undertaken specifically in this area (see suggestions for further study in Section 6.2).  

5. Niagara in Context

5.1 Economic impact of Niagara’s cultural sector: comparison with other Canadian jurisdictions (direct impact)

In the analysis, the research team compared the relative economic impact of culture in Niagara with various jurisdictions in Canada, based on per-capita direct impact GDP data. Such a cross-jurisdictional comparison of economic impacts of the cultural sector can only be made for direct economic impacts for the following reasons:

The calculation of direct economic impacts is based on standard economic methodology using employment and wages. The indirect and induced economic impact numbers can be calculated using various economic models; thus, the latter two impacts cannot be considered comparable to the results generated by this study’s analysis.

In calculating the direct economic impacts, it is important to standardize the results based on per capita calculations since the results of the economic impact assessments conducted in other jurisdictions vary according to the geographic scope. A simple comparison by size of population is therefore somewhat problematic. For example, some of the comparable studies are provincial in scope while others are municipal or regional. These differences in geographic scope mean that there are a number of uncontrolled variables and factors that could affect the impact of the cultural sector. For instance, a provincial jurisdiction will likely experience a higher than average amount of “domestic tourism” than a regional or municipal jurisdiction. There are other factors that can also affect the length of stay and the spending patterns of tourists, which is, in turn, reflected in the cultural sector impact. These other factors include: proximity to the US border, proximity to major urban centres (such as the GTA in the case of Niagara), proximity to a major port for cruise ships (as is the case in Halifax), or relative isolation (as with Newfoundland and Labrador). Further to the

responses. We note that this should be used only for demonstration purposes and not as indicative results, as explained in the Appendix text. As well, we have included a synopsis of the results of a study on Niagara: ‘Niagara Voluntary Sector Labour Force Study’ by the Centre of Community Leadership at Niagara College, published in 2003. The results of this study could not be used in this study due to several inconsistencies in methodology.  

52 A more complete discussion of volunteerism in Niagara is contained in Appendix H.

53 Governmental jurisdiction is also operative, as there may be more per capita investment in a provincial geographic area than a regional one.
consideration of the cross-regional comparisons, the calculation of each direct economic impact may differ according to the definition of the components to be included in the cultural sector and, as such, might either inflate or underestimate the effects of the cultural sector depending on what limitations were placed on the study’s scope. The dates also varied widely across the studies and so the tourism economy’s strength in the year measured for a particular area/event may have been a factor in affecting the direct economic impact numbers.

As stated, the research team’s analysis was limited to the per-capita direct impact GDP for each jurisdiction. Figure 36 below provides a summary of the comparison between the direct economic impacts of culture in Niagara and other cities/regions in Canada. Niagara’s per capita direct impact GDP is significantly smaller than Halifax and Toronto. Halifax’s result is most comparable in this case since it has a comparable population size to Niagara. On a total direct economic impact GDP basis, Niagara’s cultural sector generates $408.48 per capita in direct economic impact.

As part of this comparison, the population data were either contained in those studies or were obtained from Statistics Canada for the year closest to the publication year of the study. The research team notes that the direct impact comparators are a mix of cities, regions, or provinces and include the national average (Canada). The results for Toronto are relatively high given the large of number of cultural activities that occur in the Greater Toronto Area (GTA).

Figure 36: Summary of direct economic impact in other studies - Cities only

![Figure 36: Summary of direct economic impact in other studies - Cities only](image_url)

Source: Various Studies. Complete citations in Appendix E.
Further to this analysis, in the following figure the research team provides the estimated per capita direct GDP impact for provinces, regions and the national per capita amount. These figures were separated for easier comparisons among similar factors like designations as a province or region or city-to-city comparisons.

Figure 37: Summary of direct economic impact in other studies – Province, Region, and Country only

In addition to the comparisons provided above, a number of jurisdictions that conducted economic impact assessments of their cultural sectors are discussed in more detail as case studies in the following section—namely the Sea-to-Sky Region (Whistler) Economic Impact Study (2008), the Prince Edward County Economic Development Study (2008) and the Economic Impact Assessment of the Creative Sector in Kelowna (2010). These case studies provide an analysis of the various outcomes that resulted from economic impact analyses similar to the one presented in this report.

5.2 Outcomes of Economic Impact Assessments: Case Studies

Several municipalities and regions across Canada have also undertaken Economic Impact Assessments and/or strategic planning exercises of their respective cultural sectors. These cultural studies have acted as catalysts for a number of initiatives – whether encouraging targeted investment to deal with specific needs and gaps, to the development of strategies
towards growing and developing a more vibrant cultural sector. This section contains a series of case studies from other regions in Canada that have conducted an EIA and/or strategic planning exercise for culture.

Three case studies were selected for inclusion in this section – Sea to Sky-Whistler, Central Okanagan-Kelowna and Prince Edward County—in light of the following considerations:

- Similarity of structure and dynamics to the Niagara region (e.g., regional scope, structure of the economy, urban/rural, presence of a metropolitan centre, similar population demographics, etc.);
- Existence of previous EIA and/or cultural planning studies;
- Development and application of regional-based strategies for culture;
- Similarity of community-based economic planning including all sectors (environment, social, cultural);
- Existence of major attractions that can be leveraged to extend visits to other smaller attractions throughout the community; and,
- Existence of complementary sectors that can be leveraged to extend visits.

For example, like Niagara, the three selected case study regions are located near major metropolitan areas (MMA) and their cultural sectors either draw their clientele from those MMAs or are part of the production value chain based in those MMAs. All three regions have a medium-to-large centre, surrounded by smaller peripheries and experience both competitive and collaborative dynamics between rural and urban communities as well as between marquis attractions and more community-based cultural assets.

In addition, all three case study regions have adopted strategies that recognize the need to diversify the economic focus away from “tourism” to focus on community development and cultural place-making from a local perspective in which tourism development strategies are balanced with community-based, quality-of-life strategies.

All three regions are also facing similar demographic challenges related to an aging population—compounded by an influx of baby boomers looking for a second home or

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54 It was beyond the scope of this study to assess the methodology and data used in these studies for comparability with the current EIA study in the Niagara region. Thus, we simply note the results and use of these studies in developing initiatives and strategies in their respective regions. We also note that the series of studies undertaken in the Okanagan region appear to be the most comprehensive and thus the most comparable – subject to verification cited above – with Niagara.
retirement destination in a more rural setting—and the attraction and retention of young professionals and families.

5.2.1 Central Okanagan Region / Kelowna, British Columbia

The Regional District of the Central Okanagan is situated along the shores of Okanagan Lake in the southern interior of British Columbia. The area is an attractive tourist destination and has a wide range of businesses. The region is comprised of seven separate municipalities, with the City of Kelowna being the largest urban centre.

Figure 38: Map of Okanagan Region/Kelowna, British Columbia
The region’s population in 2011 was 187,351 with Kelowna’s population accounting for 121,921. The table below compares some basic statistics from the Central Okanagan and Niagara.

Table 9 - Key Statistics: Central Okanagan

<table>
<thead>
<tr>
<th>Facts</th>
<th>Central Okanagan Region/ Kelowna CMA</th>
<th>Niagara Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographic Area</td>
<td>2,904 km²</td>
<td>1,852 km²</td>
</tr>
<tr>
<td>No. of municipalities</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>Metropolitan Centre</td>
<td>Kelowna</td>
<td>Niagara Falls; St. Catharines</td>
</tr>
<tr>
<td>Population size</td>
<td>187,35155</td>
<td>431,346</td>
</tr>
<tr>
<td>Median average age</td>
<td>44.256</td>
<td>44.1</td>
</tr>
<tr>
<td>Average household income</td>
<td>$79,008 (2011)59</td>
<td>$74,367 (2012)60</td>
</tr>
</tbody>
</table>

The Central Okanagan is currently home to a number of rich cultural assets, including:

- 10 museums and sites;
- Over 20 festivals annually;
- Hundreds of professional cultural workers;
- Numerous arts organizations; and,
- A vibrant downtown cultural district in Kelowna featuring 5 art galleries, 2 theatres, 4 museums, and a conference centre (a 6,000 seat venue).

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The region also offers a multitude of attractions and events for all demographics and all four seasons. It is rich in Aboriginal heritage attractions, indoor and outdoor events, as well as featuring a vibrant arts community. There are also a number of free outdoor music performances offered in downtown and neighborhood parks with acts ranging from acoustic folk to alternative rock.

Finally, much like Niagara, the Central Okanagan boasts rich complementary industries such as the viticulture and culinary industry that attract thousands of visitors to the region annually and can be leveraged to expose visitors to extended cultural experiences.

The region of Central Okanagan and Kelowna has undertaken a number of studies relating to their cultural sector over the past fifteen years, culminating with:

- The Creative Sector in Kelowna, British Columbia an economic impact assessment (2010);
- Vital Signs Report (2011); and,
- Our City, Ourselves (2011), which examined a number of cultural indicators.

Some of the key findings from the Economic Impact Assessment conducted in 2010 are summarized in the following table.

Table 10 - Key Findings: Okanagan EIA

<table>
<thead>
<tr>
<th>Key Findings</th>
<th>Central Okanagan Region/Kelowna CMA</th>
<th>Niagara Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment (direct jobs)</td>
<td>870</td>
<td>5,812</td>
</tr>
<tr>
<td>Annual wages generated</td>
<td>$37.8 million</td>
<td>$143.6 million</td>
</tr>
<tr>
<td>Economic impact (GDP)</td>
<td>$73.2 million</td>
<td>176.2 million (GRP)</td>
</tr>
</tbody>
</table>

62 See Table 1 in the Executive Summary of this report.
64 Ibid.
65 Ibid.
While the economic impact assessment did not itself make any clear recommendations, the *Our City, Ourselves* report made a number of recommendations, listed below:

- Measure cultural indicators every five years following the Canada Census for demographic data accuracy and to monitor the progress of the community in cultural areas;
- Identify and collect robust arts and culture statistics to inform the next cultural assessment;
- Encourage policy-makers to think strategically about the inclusion of cultural resources into Kelowna’s planning processes to achieve key objectives in areas such as place-making and community development;
- Achieve an authentic, creative city through the provision of everyday cultural spaces by encouraging more flexible zoning and the creation of vibrant public spaces;
- Maintain and enhance the current level of funding to arts and culture notwithstanding any major changes to the provincial or federal funding environment; and,
- Improve communication with the arts and culture community as well as with the community at large to celebrate various cultural achievements, including initiatives in which local government support has played a key role.

In addition, these reports were used by the region as a tool along with other cultural indicator reports to demonstrate the tangible and intangible value of the cultural and creative sector and ultimately resulted in the development of the region’s 2012-2017 Cultural Plan.

The plan includes the following recommendations:

- Enhance the existing Municipal Grant Program;
- Optimize existing cultural facilities;
- Find more and different kinds of affordable cultural spaces;
- Integrate heritage as part of cultural vitality;
- Enhance cultural viability at street level;
- Build personal connections to cultural vitality;
- Improve data collection and measure progress with a cultural report card;
- Convene and connect the cultural community;
Integrate culture into plans and processes & use innovative funding approaches; and,

Leverage culture in tourism.

These recommendations fall into five categories or themes:

- Building the capacity of the cultural sector;
- Reflecting culture throughout community;
- Ensuring heritage is appropriately represented;
- Addressing current and future space requirements; and,
- Improving communication within the culture sector and the larger community.

The cultural plan was approved by Council in 2012 and staff were directed to move forward with all non-monetary recommendations.

The cultural planning process in Central Okanagan has succeeded in encouraging policymakers to think strategically about the inclusion of cultural resources into policy development and planning processes in other areas and departments. As a result, the region has a plan to continue to measure cultural indicators every five years in order to be able to monitor progress.

This community-based approach to economic and cultural planning aligns with Niagara’s own approach. Through its various research initiatives Kelowna/Central Okanagan has shown its ability to develop a common vision and strategy from its diverse constituent stakeholders and move forward in partnership with the province in developing culture and tourism in the Central Okanagan region.

In Niagara, the EIA is being conducted as a result of recommendations from the Culture Plan and therefore will not have the same role as it did in Central Okanagan in terms of encouraging further measurement of cultural indicators. That said, the findings of the economic impact assessment in Niagara can still be used to make the case for culture among policy- and decision-makers along with the results of other complementary research initiatives. It can be used to further the Niagara Culture Plan’s recommended actions in order to bring culture to the forefront of community and identity building, and economic development in Niagara.
5.2.2 Prince Edward County, Ontario

Prince Edward County (PEC) is located in Southern Ontario on a large irregular headland at the eastern end of Lake Ontario, just west of the head of the St. Lawrence River. This headland (officially named Prince Edward County in 1792) is surrounded on the north and east by the Bay of Quinte. Given that the Murray Canal now connects the bay to Lake Ontario across the only land connection, the county is technically an island.

Figure 39: Map of Prince Edward County, Ontario

The following table provides a summary of some key statistics for the region compared to Niagara:

Table 11 - Key Statistics: Prince Edward County

<table>
<thead>
<tr>
<th>Key Statistics</th>
<th>Prince Edward County</th>
<th>Niagara Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population size</td>
<td>25,25866</td>
<td>431,346</td>
</tr>
<tr>
<td>Median average age</td>
<td>51.667</td>
<td>44.4</td>
</tr>
<tr>
<td>No. of municipalities</td>
<td>Single tier – 10 wards</td>
<td>12</td>
</tr>
</tbody>
</table>


67 Ibid.
In 2000 the municipal council in PEC established the Economic Development Office. Council hired a marketer rather than an economic developer as a leading member of the Office’s staff, which resulted in the adoption of an asset-based development approach, whereby community strengths were identified and products were developed around those strengths. The products were then marketed and promoted as a means of stimulating growth in the region.

The Economic Development Office completed a report, *Market Readiness Assessment and Economic Development Plan*, in 2004. The main conclusion of the report was that Prince Edward County had zero competitive advantage to attract traditional industry, but rather “quality of place” was the county’s main draw. The plan focused on using this advantage to attract people to the community who would create local business activity and jobs. This economic synergy is being perpetuated as more and more artists move to the region and more public cultural events are scheduled.

People who specialize in design or in multi-media, film and video production have also gravitated to PEC in search of a calm, rural lifestyle and a like-minded peer group. These cultural professionals are using the power of the Internet and remote working tools to live their dream while catering to clients across the country.

The county also promotes its own history and heritage to attract visitors interested in heritage tourism. PEC showcases its loyalist past, heritage houses, historic buildings and agricultural roots. Indeed, the main streets are full of commemorative historical plaques.

Given this unique combination of a rural setting, rich local history and heritage, and a burgeoning cultural and creative cluster, the Prince Edward County Economic Development Office focused its efforts on adapting an urban economic development concept trend, that of the “creative economy”, to rural conditions. This led to an approach that made the county known as an incubator of “creative rural economy”.

In 2005, again under the auspices of the Economic Development Office, a Strategic Cultural Plan was presented to Council. The goals of the plan were to:

- Define a more systematic approach to cultural development;
- Leverage greater benefit from PEC’s rich cultural resources in support of economic and community development; and
- Help improve the environment for both foreign and domestic investment.

Three broad themes emerged from the study:

1. **Managing Growth**: taking steps to ensure that growth and development, though necessary for ongoing prosperity, do not undermine the “quality of place” which is core to PEC’s value proposition.
2. **Cultural Places & Spaces**: extending and improving the places where culture happens in PEC, including:
   - Promoting an integrated vision of cultural places;'Hub and Spokes'; and,
   - Improving and extending access to cultural venues across PEC.

3. **Cultural Tourism**: building on existing strengths and overcoming barriers to collaboration. For example:
   - Extend the tourism season (i.e., build shoulder seasons through programming);
   - Strengthen tourism packaging;
   - Exploit strong links to cultural, eco and culinary tourism; and,
   - Strengthen marketing and promotion through collaboration and shared investment.

Prince Edward County’s approach has shifted somewhat since the release of the 2005 Cultural Plan. Indeed, PEC has just recently adopted a strategy for community development that moves beyond economic development. This approach will build on past economic successes and focus on retaining PEC’s quality of life and sense of place.

The cultural planning process in PEC has resulted in a number of new initiatives and outcomes to help support the growth and development of the cultural sector, such as:

- **The Development of Financial Incentive programs** to respond to the following needs in the cultural sector:
  - Attraction of creative entrepreneurs;
  - Job creation;
  - Training of creative workers;
  - Small business start-up, business expansion or new product development in one or more creative business clusters identified in the County’s Creative Rural Economy approach;
  - Development or redevelopment of creative work or live/work space; and,
  - Adaptive reuse of heritage property as creative work or live/work space.

- **The Arts Council** is currently undertaking a Cultural Economic Impact Assessment and has concluded the initial phase of completing surveys.

- **The Municipality** is in the process of considering participation in a pilot project with the province regarding performance measurement techniques.
PEC has spent the last ten years or so coming to grips with how to develop the county, leveraging heritage and culture as economic drivers and using a one-window approach to economic development. The recent creation of a Community Development Commission goes beyond what was originally referred to as economic development in that it encompasses a broader spectrum of services, all focused and aligned to provide maximum benefit to residents, visitors, businesses and investors. PEC is trying to do more with less by accessing and working collaboratively with the existing resources and expertise within the community.

Prince Edward County has looked at the creative economy from the perspective of investment policies and strategies that address “Quality of Place” from both the private and public sectors (municipal investment) as well as aligning strategies with the County Official Plan and policies. They do not single out the creative industry sector but rather roll all of PEC’s needs under one umbrella for a more holistic economic and community development approach, using a community-based approach to economic and cultural planning.

While much more involved because of the sheer number of municipalities and a much larger population base, Niagara’s unique combination of strong culinary and viticulture sectors, key marquis attractions (e.g., Canal Days, Shaw Festival, Niagara Falls), rich array of cultural and recreational offerings, rich local history and unique landscape setting (e.g., Niagara Escarpment) make it ideal for such a holistic approach to economic and community development that places the cultural sector at the center of the discussion given its role in community identity-building and place-making. While Niagara’s Culture Plan does acknowledge the role of culture in identity-building and place-making and recommends actions that bring culture to the center of community building, the EIA provides additional data to make the case for culture among policy- and decision-makers to support initiatives that further those actions.
5.2.3 Sea-to-Sky Corridor / Whistler, British Columbia

The Sea-to-Sky Corridor stretches from North Vancouver at Horseshoe Bay to Mount Currie, including Bowen Island. The term ‘Sea-to-Sky Corridor’ is derived from the common term used to designate Highway 99 and linking the area’s three main centres: Squamish, Pemberton and Whistler.

Figure 40: Map of Sea-to-Sky Corridor/Whistler, British Columbia

The following table provides a summary of key statistics for the region compared to Niagara:

<table>
<thead>
<tr>
<th>Key Statistics</th>
<th>Sea-to-Sky/Whistler</th>
<th>Niagara Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population size</td>
<td>245,000⁶⁸</td>
<td>431,346</td>
</tr>
<tr>
<td>Median average age</td>
<td>32⁶⁹</td>
<td>44.4</td>
</tr>
<tr>
<td>No. of municipalities</td>
<td>9 towns⁷⁰</td>
<td>12</td>
</tr>
</tbody>
</table>

The region has a rich and diverse cultural sector and throughout the year, a variety of events celebrates the uniqueness of each community within the region. That said, historically there has been little cultural collaboration between these communities, and even less of an attempt to develop a corridor-wide cultural agenda.

The Sea-to-Sky Corridor has the makings of a regional place-based initiative: It features the Britannia Mine Museum, the Westcoast Railway Heritage Park, Canada’s Sea-to-Sky GeoTour and the multiple components of the Squamish Lil’wat Cultural Journey, with Whistler positioned as the Corridor’s ‘jewel in the crown’.

Similar to Niagara Falls, Whistler is a global destination that enjoys a robust tourism industry built on the alpine sports (downhill skiing and snowboarding in the winter) and mountain biking and nature exploration in the shoulder and summer seasons.

Whistler also offers visitors a variety of cultural experiences, ranging from date-specific cultural festivals, such as the Whistler Film Festival and Cornucopia, through to seasonal cultural programs that are designed to animate the Village (e.g., Whistler Street Entertainment and ArtWalk).

As with Niagara Falls in Niagara region, having such a major attraction as Whistler in the Sea-to-Sky region offers both major opportunities and challenges. On the one hand, a major marquis attraction can be leveraged to draw visitors in and cross-promote other offerings in a region. On the other hand, when there is such a major attraction in the region it is often more of a challenge to build awareness about the other rich cultural offerings available in the region. However, adopting a place-based approach to cultural planning has helped the Sea-to-Sky region overcome this challenge and leverage the opportunity it presents in optimal ways.

An economic impact assessment of the arts in the region was conducted in 2008 and Whistler conducted its own EIA in 2010, which was later re-conceived with a focus on place-based tourism.

Some of the recommendations that came out of the regional EIA conducted in 2008 include:

- Communicate results of impact assessment widely to raise profile of the arts and culture sector in the region;
- Mobilize the sector in each community;

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70 APEG. (n.d.) About Us. Accessed April 12, 2013 from: http://www.apeg.bc.ca/services/branches/seatosky/about.html
The 2008 Economic Assessment of the Corridor was the basis of the 2020 Arts, Cultural & Heritage Strategy in Whistler, which concluded that the visitor experience should encounter the destination as a whole. It also led to Whistler’s Cultural Tourism Development Plan (2010), which recognized that a place-based approach leverages a destination’s sense of place to set itself apart in the cultural tourism marketplace. Other outcomes include:

- Increased awareness of arts and culture within the community and amongst potential visitors;
- Increased awareness of the role of culture in the region and the impact of cultural tourism;
- Opportunities presented by the 2010 Olympic and Paralympic Winter Games brought about the creation of the Sea-to-Sky Cultural Alliance, an initiative to stimulate engagement in cultural experiences throughout the Corridor;
- An Action Plan was developed by the arts and culture task force leading to the 2010 Olympics; and,
- The Arts Council is currently working toward a Community Cultural Plan 2012-2013. They have developed and distributed a community survey and are hosting a workshop for community residents as well as meetings with visual and performing artists in the area.

Whistler’s Cultural Tourism Development Strategy focuses on place-based cultural tourism where the heart of the visitor experience is encountering the destination as a whole – its history and heritage, stories, people, landscape, townscape and culture. It focuses on discovering what makes the destination distinctive, authentic, memorable and on the experience of ‘place’ – which includes the destination’s cultural attractions, but is not defined by those attractions alone.71 Recognizing that “place” is the heart of the visitor experience, place-based cultural tourism leverages a destination’s sense of place to set itself apart in the cultural tourism marketplace. A single phrase captures the essence of the approach: “The place is the product.”72

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72 Glacier Community Media. (2013). Cultural tourism plan under development: Success is in marketing Whistler’s story, not specific events or attractions, expert says. Accessed April 9th, 2013 from:
As suggested by recommendations in the Niagara Culture Plan, Niagara could also benefit greatly from taking a place-based approach to both tourism and community development. Given that one of Niagara’s main challenges is to retain visitors for extended multi-day stays and the attraction of new businesses and the professionals they employ, adopting a place-based approach would help the region to market itself as a destination with rich offerings.

5.2.4 Case Studies: Lessons Learned

These three case studies provide some insights into potential outcomes and initiatives that Niagara could adopt to further grow and develop its cultural sector.

While Niagara is a much larger region and has more than one ‘hub’, it has many similarities to the three case studies examined above. For example, members of the cultural community in Niagara have indicated (via the community engagement sessions) that product development, marketing and investment in infrastructure to help artists and cultural producers are among their top priorities. The key focus in Niagara seems to be around building capacity and establishing a plan that develops and coordinates the cultural sector so that it can retain and expand its role as a vibrant, vital part of the region’s economy and community life. In addition, much like Niagara, all of the selected case study regions have communicated widely with the cultural sector and local businesses and organizations and appear to have integrated cultural activities into the fabric of the community. In fact the word ‘community’ is now part of the lexicon; instead of economic development they are using the term ‘community development’.

All three case studies have expanded their cultural offerings over the timeline of their cultural planning processes and see arts and culture as economic drivers.

Of the three models, Central Okanagan has the most economic diversity. The region boasts four seasons of recreational and cultural events as well as tourism, agriculture, manufacturing, technology, urban development, business and other industries. Similarly, Niagara boasts a wealth of recreational and cultural events and activities as well as a rich cultural history and culinary tourism industry. The region is an important tourist destination. Niagara’s diverse economy also includes agriculture, manufacturing and a burgeoning creative industry.

Prince Edward County engages in agriculture, but tourism has significantly impacted the structure of the area’s economy. In fact, tourism is such an important industry in the County that a number of segments of the tourism industry have begun to distinguish themselves

http://www.whistlerquestion.com/article/20100623/WHISTLER01/306239976/-1/WHISTLER/cultural-tourism-plan-under-development
(e.g., heritage tourism, eco-tourism, agro and culinary tourism, retail or boutique tourism, and arts and culture tourism). There is a large degree of cross-over and integration among these segments that creates a strong place-based cultural tourism experience.

Indeed, Prince Edward County and Whistler are both great examples of regions with place-based cultural tourism experiences. For example, cuisine is connected to art, agricultural heritage and natural history. Understanding the interconnectivity among cultural clusters and experiences is vital to place-based cultural tourism. Supporting and strengthening cross-sectoral partnerships and collaboration with business and community partners was also recognized in Kelowna’s 2012 Cultural Plan. All three of these case study regions appear to understand this process and have successfully adopted the place-based approach, which is one of the reasons they have been successful. The cultural community in Niagara has also expressed a desire to move towards this type of cross-sectoral collaborative approach in order to turn the entire region into a multi-day tourism destination. Indeed, Niagara has a strong culinary and viticultural sector which is an important tourism driver. By adopting a place-based strategy that encourages residents and visitors to explore culinary and viticulture experiences alongside recreational and natural heritage experiences, cultural history experiences and other arts and culture experiences, Niagara will be able to leverage its existing strengths in order to encourage greater engagement with other rich cultural experiences at the community level across the region.

In addition to cultural tourism, quality of life for local residents is another common focus of cultural planning among the three case studies examined. People are attracted to places that can provide a heightened sense of quality of place, often found in the presence of local amenities, such as cultural and historical festivities, recreational opportunities and an abundance of outdoor, natural resources. What sets these case studies apart is that in addition to offering a unique mix of culinary, artistic and heritage amenities and experiences, they demonstrate ongoing efforts to grow a knowledge-intensive creative rural economy. Cultivating creativity and talent in rural communities is a way to promote continued economic growth. The creative economy in rural areas is typically based upon the presence of arts and cultural experiences. Morgan, Lambe and Freyer (2009) suggest that creativity-driven economic development in rural communities can be cultivated using artistic talents and vocationally targeted apprenticeships and training programs in crafts and design.73 Similarly, Niagara is currently working hard to attract to the region creative cultural workers and the businesses that hire them as well as skilled professionals from non-creative industries. Adopting a place-based approach that focuses on community building and

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quality of life in Niagara will be important for being able to attract and retain both residents and visitors to the region.

Canada has an aging population, with retirees being attracted to places that offer a rural landscape along with a wealth of cultural and other amenities. Like Niagara, Prince Edward County has a large proportion of retirees. By 2031 its population is expected to increase by only 1,310 people, but the number of seniors in the County will nearly double from 6,270 to 12,000.\(^74\) In Central Okanagan, the 65-and-over age group is expected to increase from 18.1% in 2011 to 25.29% in 2036. An aging population will have a major impact on the cultural industries in those regions. While per capita income for seniors is lower than in the non-senior population, those who are culturally active may spend more of their disposable income to consume culture within the region. Performing art centers, theatre productions, etc. target seniors for matinee events that the non-senior population cannot regularly attend. Thus, a senior population is an essential element to the sustainability of cultural institutions and the cultural sector overall within the region.

Another commonality among the case studies is that they all emphasized measuring cultural indicators, or at the very least identifying and collecting cultural statistics, and monitoring progress over time. More importantly, all of the regions examined also encouraged policy makers to think strategically about the inclusion of cultural resources in economic and community development planning. This is likely the most important recommendation; once policy makers and the local community understand the importance of culture to the local economy and get behind investment in local cultural resources, it will make a significant difference. Niagara has already engaged in comprehensive cultural planning resulting in the *Niagara Culture Plan*, which in turn has helped leverage unprecedented but one-time investment in culture through the Cultural Capital of Canada 2012 designation. The data resulting from this extensive program coupled with the current study and other work will help demonstrate culture’s multi-faceted contributions to the region. Nevertheless, there is an ongoing need to make the case for culture in order to inform future policy and investment decisions and encourage further cultural development initiatives.

Whistler and Kelowna have successfully developed themselves as four-season destinations, while Prince Edward County is moving toward extending its shoulder season. Similarly, making Niagara a four-season destination is one of the opportunities for growth that the

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The cultural community in Niagara has identified. It is also one of the recommendations featured in Niagara’s Economic Growth Strategy 2009-2012.

Using tourism as part of a broader strategy designed to leverage the quality of place required to be a tourist destination with other regional quality of life amenities, appears to be the path to follow. This two-pronged strategy will attract not only tourists, but also new permanent residents to Niagara and lead to a more sustainable economic situation.

6. Opportunities for Cultural Sector Growth in Niagara

As seen in the case studies explored above, economic impact assessments are an important part of cultural planning and development, though only one of many steps in the process. Niagara Region has already developed a cultural plan and conducted a cultural mapping exercise. The present economic impact assessment is an assessment of the impact of culture on Niagara’s economy and a measure of the economic vitality of culture in Niagara.

The next stage in cultural development for Niagara will be to identify, prioritize and implement strategic initiatives for developing and growing Niagara’s cultural sector, which will be informed by the results of this economic impact assessment and other existing and future research studies.

Throughout the process of this study the cultural community (via a number of Community Engagement Sessions and an Open House) has been consulted to discuss the needs, challenges and key opportunities for the growth and development of the cultural sector in Niagara. Combining the results of these consultations with secondary research and an in-depth analysis of case studies from other jurisdictions in Canada, a series of opportunities for Cultural Sector Growth in Niagara has been identified that are summarized in Section 6.2 below. First however, Section 6.1 provides a brief summary of some of the key strengths and weaknesses of Niagara’s cultural sector as identified through the economic impact analysis, community consultations, and secondary research.

6.1 Strengths and Weaknesses of Niagara’s Cultural Sector

Drawing from the community engagement process, as well as the primary and secondary research, the research team identified Niagara’s cultural sector’s primary strengths and weaknesses.

Niagara’s Strengths

- Niagara offers a wide variety of cultural and recreational offerings, including a number of ‘marquis’ cultural attractions such as Niagara Falls, the Shaw Festival, and the Niagara Wine Festival, among others. In particular, survey respondents indicated that the most active cultural segments in Niagara are: live performing arts; sports and recreation; and festivals and events. In addition, the greatest number of respondent organizations identified museums and galleries or heritage as the
primary segment in which they operate. This wealth of cultural offerings both contributes to a greater quality of life for residents and a richer tourism experience for visitors.

However, cultural sector stakeholders indicated that the sector could improve upon the marketing and promotion of the additional attractive cultural and recreational offerings of all sizes located throughout Niagara to both local residents and visitors, beyond the core marquis attractions.

The Sea-to-Sky region has also had to struggle with the challenge of leveraging the existing strength of its key marquis attraction (Whistler) while also boosting awareness of the wealth of other cultural and recreational assets that the region has to offer.

- The combination of natural and cultural attractions, captivating local culture and history, and a strong wine and culinary culture means that Niagara is an attractive tourism destination. In addition, the various attractions in the region can be leveraged off one-another, much as Prince Edward County and Central Okanagan have done with great success with their wineries and culinary attractions.

- Niagara’s cultural sector appears to be well established as evidenced by the high average age of cultural organizations and businesses who responded to the survey (28 years) and the high longevity of the careers of freelancers operating in the region (18 years). Such maturity indicates that the sector has succeeded in establishing a certain measure of sustainability in spite of challenges such as low public support and small budgets. That said, this maturity also indicates that there is a certain measure of stagnation in the sector with very little new growth and development happening.

- Niagara is ideally positioned in terms of access to tourists. The region’s proximity to the US means that it receives many cross-border tourists, particularly travelers who are visiting Niagara Falls from New York. In addition, the region is ideally positioned so that much of the through-traffic of tourists traveling from the US to Toronto pass through the region.

Niagara's proximity to the GTA is also beneficial as there are many visitors who travel to the region from the GTA to attend key cultural events or attractions.
However, although Niagara’s location is beneficial, the challenge remains keeping tourists in the region for multi-day stays.\textsuperscript{75} For example, the latest Regional Tourism Profile indicates that the average length of stay for visitors to the region is only 0.9 nights.\textsuperscript{76}

- Accessing the region from outside is relatively easy. For example, the region is in relatively close proximity to the Buffalo Niagara International Airport, Hamilton International Airport, Pearson International Airport and Billy Bishop Airport. Major highways coming from the GTA and other parts of Southwestern Ontario also serve the area. In addition there are a number of access points that connect the region to major highways in the US, which link the region to Buffalo and Rochester.

The area is also well-served by long-distance public transit, including GO Transit and Via Rail (by way of Amtrak), particularly the large urban centres in the region.

Similarly, the Central Okanagan is well served by a number of highways the lead into the region from Vancouver, Calgary and the US (e.g., Seattle) and a busy international airport.

However, while it is easy to access the region, particularly the large urban centres, one of Niagara’s major challenges is that access to its smaller communities is more limited, particularly for travelers relying on public transit. The most popular forms of public transit route in-bound travelers through major hubs. This means that there is an added layer of transportation requirements and possible complications (i.e., the need to rent a car) to access smaller communities, reducing the chance of exposure to Niagara’s cultural diversity.

- Niagara has access to a large pool of well-educated emerging professionals. Locally, renowned institutions of higher education such as Brock University and Niagara College serve the region. In addition, the region is relatively close to other educational hubs such as Toronto, Hamilton, and other parts of Southwestern Ontario (e.g., Kitchener-Waterloo). As a result, cultural organizations in Niagara have access to a wealth of emerging talent, both locally and from adjoining jurisdictions.

\textsuperscript{75} The cultural community indicated that this was a major challenge during the community engagement sessions in the spring and fall of 2012. In addition, Niagara’s Economic Growth Strategy recommends that Niagara take action to develop itself as a multi-night or overnight destination indicating that this is a challenge for the region.

However, retention of young, emerging professionals educated in Niagara and the attraction of young professionals from other educational hubs nearby remains a major challenge for Niagara.

- Finally, while Niagara’s high median age indicates that the region is struggling to attract younger professionals, it also indicates that there are high numbers of established residents and retirees. This presents a unique opportunity for Niagara’s cultural sector in two significant ways. First, older, more established individuals tend to have a greater amount of disposable income that can be spent on participation in a variety of cultural offerings.

Second, Niagara’s cultural sector relies heavily on volunteer human resources as evidenced by the large number of organizations who reported having no paid employees. A high percentage of retirees in the region’s population means that the cultural sector has a larger pool of potential volunteers to draw from.

**Niagara’s Weaknesses**

- Niagara’s geographic size (covering a total of 12 municipalities) is a major challenge for building a unified regional identity and branding the region. In addition, public transit infrastructure in many of the smaller communities and between communities in the region is very poor or non-existent, which exacerbates the challenge related to building a unified regional identity and brand. As a result of this wide geographic spread, the cultural sector struggles to engage local residents across the region and retain visitors in the region for multi-day stays.\(^77\)

- The average household income in Niagara is $74,367 – significantly lower than the provincial average in Ontario ($82,225) and the national average (about 13% less – ~$84,034).\(^78\) While low wages may be an attractive factor for businesses considering location in Niagara, the low average income only serves to contribute to the perception, particularly among young professionals, that Niagara does not offer as many economic opportunities as other regions.

For this reason, Niagara needs to build and promote its cultural sector to continue to build on its high quality-of-life. In doing so, the region will attract more businesses as well as young professionals and families. Attracting more businesses increases

\(^77\) These concerns were expressed by participants during group discussions at the community engagement sessions held in the spring and fall of 2012.

competitive wages and attracting young professionals who possess increasingly higher levels of post-secondary education and expertise. By extension, this process has the potential to adjust average incomes in the region.

- Niagara’s cultural sector also struggles from a lack of accessible physical infrastructure and facilities for the production and presentation of cultural products (e.g., performing and visual arts spaces, public spaces for festivals and events, etc.). Although there is some local investment happening to remedy this (such as the new Performing Arts Centre being built in St. Catharines), there is not enough new development to meet the needs of the sector (in terms of the expectations outlined in the Niagara Culture Plan).

- The sector is also hindered by low levels of investment from the local, regional, provincial and the federal governments. Niagara Region and its partners need to work together to make the case for culture in order to drive greater investment in the sector and the region. To further illustrate how critical funding is to the cultural sector, a recent evaluation exercise conducted for the Cultural Capitals of Canada program (which was federally and regionally funded) indicated that 93.6% of project leaders leading projects under the Nights of Art program indicated that their event could not have taken place without the funding provided by the Cultural Capitals of Canada program.

- Finally, lack of cross-sectoral and cross-community collaboration is a major weakness for Niagara’s cultural sector. This lack of collaboration hinders the region’s ability to present itself as a unified regional destination. It also results in missed opportunities for cultural organizations to pool their resources and leverage their efforts in order to develop stronger cultural offerings and provide a richer, more rounded and extended cultural experience to both local residents and visitors.

The Sea-to-Sky region similarly struggled from a lack of collaboration in the cultural community and a lack of a region-wide cultural strategy or agenda. However, opportunities presented by the 2010 winter Olympics have gone a long way toward

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79 As indicated in the survey portion, access to government funds is limited. See Section 3.3.
80 Data provided by Chimpanzee Inc. Please note that Nordicity was not involved in the data collection for the evaluation of the Cultural Capitals of Canada program and cannot vouch for the methodology used by Chimpanzee in administering the evaluation surveys. Therefore, any data and analysis presented here from those surveys is limited and should be taken at face value.
81 These ideas were discussed at length by participants at the community engagement sessions help in the spring and fall of 2012. Lack of collaboration was frequently mentioned during the community engagement sessions. See Section 6.2 for more discussion.
helping the region develop a more holistic and collaborative approach. Similarly, the Cultural Capitals of Canada program, which saw great success in 2012 in Niagara and required extensive collaboration across the region and the entire cultural community, could be used as a model for encouraging greater cultural collaboration in the region.

The opportunities for growth outlined in the following section offer suggestions for how Niagara Region can work to overcome some of the challenges faced by the cultural sector and leverage the region’s strengths.

6.2 Summary of Opportunities for Growth

1. Strengthen local support for Niagara’s cultural offerings

Many members of the cultural community indicated that the key to success for culture would be to integrate culture into community (and not only economic) development, build the cultural sector’s local reputation as a source of diverse, vibrant cultural experiences, and establish strong relationships with local audiences. The objective would be to make Niagara a cultural destination for local residents as well as for external visitors. A strong local reputation can then be leveraged to promote the region externally in order to attract visitors as well as new businesses and residents to the region.

The Niagara Culture Plan recommends that the Region “support initiatives which promote shared identity, unique communities and stories in order to encourage participation and a sense of belonging in Niagara” (Action 4.1).

In addition to contributing to a greater sense of shared local identity, building stronger relationships with local audiences – as evidenced by attendance at local cultural events and programs – would generate greater public support for culture in the region, including volunteerism. This is critical to ensure culture is an integral part of the quality of life in the region. Indeed, the Cultural Capitals of Canada program was a perfect example of how local promotion of the value of culture can encourage great local participation in cultural activities. Recently collated program evaluation data shows that 89.8% of events under the Nights of Art program made use of volunteers.\(^\text{82}\)

\(^\text{82}\) Data sourced from Chimpanzee’s evaluation surveys for the CCC program. Ideally, it would have been interesting to also provide data related to the number of volunteers who worked at these events and the number of hours they volunteered. In addition, Nordicity would have liked to provide some data related to the origin of event attendees (i.e., local vs. external) to further provide insight into how events such as those included in the CCC program can help with citizen engagement and local identity building. However, the data collection process has not been completed by Chimpanzee in these areas. The data made available as of writing this report often only provided response rates for individual questions rather than the actual data related to the question.
Building local audiences would also increase ‘gate receipts’ for live performance venues, and sales of cultural goods and services by local cultural workers. Greater local participation would improve the viability and long-term sustainability of cultural enterprises as well as enabling the creation of new jobs, particularly for the youth sector in local cultural enterprises. Strong and sustainable local audiences for cultural events would provide greater income security to cultural institutions and workers and likely attract outside visitors looking for ‘authentic’ regional experiences.

Realizing all three levels of benefits would, in turn, help with making the ‘case for culture’ (developed further in the text below) when it comes to future investments by local, regional, provincial and federal governments.

In order to build local audiences, Niagara Region and its partners should consider the promotion of cultural offerings within Niagara’s communities as complementary to the existing advertising campaigns and branding efforts promoting the region’s rich cultural offerings externally. Additional detail regarding improvements to Niagara’s marketing and communication efforts is provided below.

2. Build on Niagara’s existing strength as a tourism destination

Communities that have a robust cultural tourism economy are those that also enjoy high public and private sector investment in culture and where residents have access to a wide range of cultural amenities. The Niagara Culture Plan recommends that the region “Promote and market Niagara as a cultural destination to both residents and tourists” (Action 4.2). Cultural tourism is not just about tourism, it is an opportunity through which the arts and culture sector can leverage its own development and also serve the local community.

With a wealth of key natural and cultural attractions—such as Niagara Falls, the Niagara River, the many parks and nature sites along the escarpment, the Welland Canal, the Shaw Festival, Fort George, Fort Erie, the Winter Festival of Lights, and others—and a rich culinary and viticulture scene, Niagara has already established itself as a major tourist destination. That said, Niagara still faces some core challenges when it comes to fully realizing its potential as a tourist destination.

In places like Niagara, lead attractions and experiences, which often act as cultural flagships, can be leveraged to attract visitors into the region. However, as mentioned during the community engagement sessions, additional effort is needed to ensure that those visits and experiences are extended beyond the core attractions to lesser-known cultural attractions and events in smaller communities elsewhere in the region. If successful, such a strategy

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would increase spending on cultural products and services throughout the region as well as in related retail services (hotels, restaurants, etc.). Extending the cultural tourism experience in this way encourages additional spending in the region by both local residents and visitors. The challenge lies in successfully extending the experience beyond those core attractions.

By way of example, Whistler offers more than 150 cultural experiences, but its major challenge is that the community itself is not recognized as a cultural destination. In order for Whistler to successfully achieve recognition as a cultural destination, some cultural experiences may need to be developed, while cultural tourism products that are currently in place will need increased promotion. It is believed that by weaving together authentic arts, culture and heritage experiences it will enhance the overall Whistler experience for both visitors and locals. In the coming months the Cultural Tourism Advisory Group in Whistler will draft a governance model, identify development priorities and funding sources as well as programming and promotional opportunities. Similarly, Niagara will also have to overcome challenges in further promoting the Niagara brand as a cultural tourism destination, particularly one that extends beyond the core flagship attractions in the region.

Indeed, during community consultations the cultural sector community in Niagara corroborated this point. Participants agreed that one of the keys to the sector’s future growth and prosperity would be to leverage Niagara’s core tourist destinations, along with the region’s rich cultural history and the diversity and wealth of other cultural and recreational offerings available across the region, to turn Niagara into a multi-day destination where visitors will stay and explore a multitude of rich arts, heritage, culinary and recreational offerings.

Location also plays a major role in cultural/destination tourism. Niagara Region is on the doorstep of the largest population base in Canada. However, many visitors are same-day visitors who come to the region for a specific event or attraction. Strategies to extend these visits to overnight stays that incorporate lesser-known attractions in smaller communities in the region will be critical for increasing the region’s cultural tourism. Niagara will also need to leverage its proximity to the US and the “through” traffic it receives from US tourists on their way to Toronto.

- **Make Niagara into a four-season destination**

As shown in the case studies, development of four-season tourism leverages existing capital investment in cultural facilities and provides year-round employment for cultural workers. Niagara currently has a strong tourism industry during the summer months, but it peters out during the winter months. However, Niagara has a number of great cultural offerings for visitors across all four seasons as evidenced by the large number of organizations that responded to the survey who indicated that their core operating season was during the winter and spring seasons. The cultural community expressed the need for Niagara Region
and its partners to collaborate in order to further develop and promote the region as a four-season destination.

3. **Strengthen marketing and promotion of Niagara’s cultural sector outside of the region**

One of the needs identified during the Community Engagement process was the need for more internal as well as external communication and marketing of Niagara’s cultural sector. It was felt that delivering compelling and coordinated communication will encourage more support and participation, both locally and from visitors to the region.

Similarly, one of the challenges mentioned in the Kingston Culture Plan was lack of communications and information flow, deficit in promotional skills and lack of faith in the local media. In the Kelowna Culture Plan one of the recommendations was to annually host an issue-based forum, *Extend Your Reach: Marketing and Promotions in the Media for Kelowna’s Arts, Cultural & Heritage sector*. It involved local media and the arts, culture and heritage groups. The purpose was to:

- Approach media and gain an understanding of their challenges;
- Help media to understand the challenges faced by arts, culture and heritage groups; and,
- Generate ideas for promoting events and collaborating with other groups and organizations.

In a similar way, Niagara’s cultural sector would benefit from increased cross-regional marketing and communication efforts. There remains a challenge in Niagara in that the key media outlets are often highly localized. This means that it takes additional effort to liaise with the media in each municipality to ensure coverage across the region—a time-consuming and resource-intensive endeavor.

In order to successfully promote the region, there needs to be a strong brand around which to build marketing and promotional efforts. Building on existing branding efforts will be an important factor in further promoting Niagara as a cultural destination for local residents, incoming residents and long- or short-term visitors.

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Additional branding efforts should focus on promoting Niagara as a region with rich cultural offerings and a high quality of life as well as reflecting the personality of the region and the vitality and creativity of its residents.

Messaging should also be aligned strategically to promote the region as one connected destination, where the various communities are interconnected and work together. A common brand should present a unique and attractive vision for those seeking to relocate, whether businesses (e.g., from the high tech industry) and/or young professionals and families. Branding creates value for a region by aligning strategic vision with the talent of people who live there, stimulating investment to fulfill the region’s needs and creating new cost-effective ways to give the region a memorable voice.

For example, in Prince Edward County, the Tourism Destination Alliance ties tourism, economic and artistic communities through a single brand of common ‘place’ and markets itself as a ‘getaway’ brand. “Come back to Earth” is a common brand used to position and promote Prince Edward County. In Kelowna attractions and services located in neighbouring communities are marketed with the Kelowna brand to leverage its high level of brand awareness and the resulting drawing power. “Those visitors attracted to Kelowna travel throughout the area, regardless of municipal boundaries, and through their exploration discover neighbouring communities such as The District of Lake Country and more fully understand the identity and sense of place of these unique communities.”

Although there are existing efforts to create a strong regional brand (e.g., Niagara Economic Development’s Niagara Original initiative) and focus on promoting Niagara as a single destination, one of the strongest needs identified during the community engagement process in Niagara was the need for a more centralized regional marketing initiative for the cultural sector.

Members of the cultural community expressed that cultural marketing efforts tend to be focused at the municipal or even organizational level. However, a more consolidated approach to marketing and promoting the region as a whole would benefit all cultural organizations across the region. Of particular note, the transition of regional economic development has resulted in a new organizational structure, which will be reviewing regional promotion.

Indeed, a more consolidated effort would allow Niagara to leverage its core cultural attractions and build awareness about the wealth of other cultural and recreational offerings available across the region.

Centralized marketing and promotion initiatives for Niagara’s cultural sector, led and managed centrally by the Niagara Region in partnership with Tourism Niagara, and that leverage existing regional branding efforts will be an important factor in improving the vitality and vibrancy of the cultural sector across Niagara.

A consolidated, centralized marketing effort would:

i. Help build local awareness of and participation in cultural offerings across the region, contributing to a greater ‘sense of place’ and helping to build a stronger shared regional identity. For example, a special event or program being promoted locally by an organization could have a greater impact if it were also promoted to other communities across Niagara. Ensuring that cultural events, activities and businesses are reaching out beyond the local to the wider Niagara community would help build a local regional audience for culture and contribute to increasing the vibrancy of the sector.

ii. Promote Niagara as a whole as a destination (for both tourists and new residents), with a multitude of offerings. A more centralized, regional-level promotional effort will help to extend the perception of the Niagara experience beyond core attractions and events and contribute to building Niagara’s brand as a multi-day, four-season destination.

4. Engage in more collaborative and complimentary product development and cross-promotion

As seen with the case studies above, increased cross-regional and cross-sectoral collaboration is an important part of building a more vibrant cultural sector.

Cultural community members expressed that one of the weaknesses of Niagara’s cultural sector is a lack of collaboration. While cross-sectoral collaboration was identified as an area that needs to be strengthened, cross-regional collaboration was emphasized as a much more pressing issue. Indeed, community members indicated that it is not uncommon for organizations across the various cultural sector segments to collaborate at the local, community level. However, organizations from the same cultural sector segment and especially from different cultural segments in different local communities rarely collaborate. Indeed, local cultural organizations are often not even aware of what is being offered in other communities.

Stronger local and intra-regional marketing and promotion would certainly help to increase awareness of what other organizations and communities are offering. However, more active,
purposeful information sharing and collaboration among cultural organizations is needed in the region. The Cultural Capitals of Canada is a great example of cross-regional and cross-sectoral collaboration in order to provide coordinated and complimentary cultural offerings.

Central to being able to collaborate more often and more effectively is the ability to share information efficiently so that there is greater awareness of the various cultural offerings available across the region at any given time. While face-to-face meetings and networking events would help create a community of collaboration, the cultural community already struggles with limited time and human resources so attendance at such events can be challenging in spite of their potential benefits. Therefore, other more efficient tools for information sharing and communication would be more beneficial. For example, leveraging existing tools such as the new site cNiagara.ca would be a great way to encourage greater information sharing and collaboration among cultural organizations in the region.

These tools would provide an easy way for cultural organizations to access information about cultural offerings elsewhere so that duplicate offerings and efforts could come to light and be addressed. For example if two organizations were to hold complementary events, it would be mutually beneficial for them to work together to ensure that their respective events are strengthened. Two organizations with complementary offerings could also engage in cross-promotion to encourage their own audiences to take advantage of the offerings elsewhere as a compliment to their own offering.

Similarly, two organizations with very similar offerings could collaborate to ensure that they do not duplicate their offerings but rather work collaboratively to strategically develop complimentary offerings that can be leveraged together. Alternatively, two organizations with duplicate offerings could combine their resources and efforts to develop a single enhanced product (e.g., event, series or program) to better serve audiences.

The recent Cultural Capitals of Canada program was a great example of how collaboration in the cultural community can bring culture to the forefront and ensure the successful delivery of high-quality cultural products and events that attract and engage audiences from within the local community and visitors from outside the community.

Niagara Region should consider ways to support more collaboration in the sector by:

i) Assisting in the creation or further development of tools such as regional web portals (e.g., cNiagara.ca);

ii) Increasing the flow of information across the community; and,

iii) Providing on-going, timely and easy access to data and reports regarding Niagara’s cultural sector.
Indeed, Niagara Region could take on a leadership role in developing and maintaining a set of information-sharing tools to encourage and enhance greater collaboration in the cultural sector in the region.

5. **Build a case for culture to encourage greater investment in Niagara’s cultural sector**

Culture plays an important role in the tourism industry. Similarly, culture plays a key role in developing a more diversified, knowledge-based economy that emphasizes creative workers. In today’s knowledge economy, many economic indicators now include indicators related to the vibrancy of a jurisdiction’s cultural sector. Local communities can leverage this discourse across Canada in order to build a case for investment in culture to drive greater economic diversity and prosperity in an ever-increasing knowledge-based economy.

Investment in culture in Niagara at various levels of government was identified as a significant limitation to the growth and development of the cultural section in the region in the survey. In addition, many cultural community members during the consultation process indicated that there was a strong need for building a ‘case for culture’ in Niagara both at the local and regional level, as well as provincially and federally. By making use of the findings and recommendations in this study, Niagara Region could develop this ‘case for culture’ and work with community and municipal partners to ensure that key decision- and policy-makers are made aware of the impact and value of culture. The Cultural Capitals of Canada program in 2012 is a great example of how successfully bringing Niagara’s cultural sector to the forefront of decision-makers and promoting its importance to the community can help to encourage large amounts of investment from all levels of government. Indeed, the program received a total of $1.625 million from the Federal Government and $670,000 of investment from Niagara Region.

A strong ‘case for culture’ could lead to increased investment in culture—both public at all levels of government and private investment from local residents and private-sector organizations; increased support for local individual artists; increased investment in cultural infrastructure; and the development of capacity-building initiatives to help support sector growth.

Niagara Region could also help ensure that a ‘case for culture’ has as great an impact as possible by working with local municipal partners to ensure that there is a cultural sector representative and advocate in all 12 local municipal governments.

In order to be able to build a case for culture, Niagara Region needs to first identify and measure key indicators. The *Niagara Culture Plan* calls for the “development of measures
and indicators to assess progress in building culture into all facets of how the Region plans for its future.\(^{87}\) The EIA is one of the tools that can be used to continue to monitor the growth and health of the cultural sector.

There are many types of indicators for the cultural community. The Community Foundations of Canada developed indicators for various aspects of arts and culture as part of its 2006 *Vital Signs* community indicators project, which included five cities. In 2011 the City of Kelowna used the results of the Central Okanagan Foundation’s 2011 report to aid in the development of priorities for their Cultural Plan. *Vital Signs* aims to measure perceptions of community members and develop an understanding of key issues facing the region and its cultural sector.

Potential quantitative cultural indicators include:

- Contribution of the cultural sector to the economy;
- Contribution of cultural tourism to the economy;
- Spending by cultural tourists;
- Number of workers in creative jobs by age/sex/ethnicity/qualification/region;
- Number of jobs requiring training in culture; and,
- Level of creative innovation coming from a local economy (e.g., the number of new patents registered).

Qualitative cultural indicators include:

- Community perceptions of cultural tourism;
- Importance of arts for creative workers (i.e., quality of life);
- The attractiveness of a community to creative workers (i.e., quality of life);
- Perceived benefits to business due to engagement with culture;
- Value added contributions by cultural industries;
- Consideration of culture in economic strategies; and,
- Consideration of culture in local development plans.

The Niagara Region’s Economic Impact Assessment of Culture provides a snapshot of some key quantitative indicators. By coupling the findings of the EIA with findings from the

ongoing Sustainable Niagara process, the Region will be able to develop a model to engage with the provincial and federal governments and make a case for the benefits of investing in Niagara’s cultural sector. In addition, leveraging funding from senior levels of government and the private sector and working with community partners to identify ways in which individual cultural producers and non-incorporated groups can access financial support will decrease the reliance on local public funding.

6. **Conduct further research to measure additional cultural indicators.**

A number of key areas should be identified for further study including volunteerism, public funding for culture in Niagara and more. Gathering additional data and evidence regarding Niagara’s cultural sector will better help Niagara Region identify priorities, address current challenges, and make a stronger case for culture.

- **Volunteerism**

There is a clear lack of quantitative and qualitative data regarding volunteerism in the cultural sector in Niagara. However, cultural community stakeholders have expressed how critical volunteerism is to the sector’s sustainability. In addition, survey data indicates that a number of organizations in Niagara’s cultural sector are entirely volunteer-operated and most organizations are operating with a very small budget which could also indicate a high reliance on volunteer labour. Reliable data on volunteerism in Niagara’s cultural sector are an important indicator of citizen engagement, public support and general cultural activity that require further study.

- **Public Funding**

In addition, public funding for culture in Niagara should be further investigated. Many survey respondents indicated that a lack of public funding was a significant limiting factor for the cultural sector in Niagara. Research should be conducted in order to identify what support exists for Niagara’s cultural sector.

The survey also identified that very few freelance professionals or independent artists in Niagara are accessing public funding. However, the survey did not address why there is such little access to these funds happening in Niagara. Given that freelancers and independent artists are generally just as, if not more, reliant on public support and other grants than cultural businesses and organizations, further research should be conducted into what support is available to Niagara artists and why they may not be accessing it.

- **Facilities**

Although the cultural map and inventory of cultural assets identified existing facilities and infrastructure, community consultation with the cultural sector indicated that there is a lack of facilities and infrastructure to serve the cultural community. This was identified as a major capacity issue for the sector and its growth.
Follow-up research should be conducted in order to update data regarding what facilities and infrastructure exist along with a needs analysis, capacity-building analysis and sustainability analysis regarding access to those facilities for cultural organizations and events across the sector.

- Public participation

Survey respondents indicated that participation in the arts has increased, and the success of the Cultural Capital of Canada events illustrates there is a large potential audience for cultural events and programs in Niagara. However, the scope of this study did not allow for further investigation into public participation, why it may be increasing and its impact on the sector. In addition, one of the recommended options for growth that emerged from this analysis indicated that increasing local awareness and support would be critical to the growth and development of the Niagara’s cultural sector.

Further research into public participation (both local residents and visitors) in the cultural sector (including volunteerism, as indicated above) should be conducted to gather additional information about the health and vitality of Niagara’s cultural sector.

All six of the opportunities for growth outlined above would contribute to the growth and on-going health and vibrancy of Niagara’s cultural sector. However, the key ingredient to ensure maximum impact from these opportunities is a central, regional-level leader to help coordinate and implement these centralized efforts and initiatives across the region—a role that Niagara Region would be best positioned to undertake.