



The Niagara Parks Commission

Business Plan 2024-2027

1.0	Executive Summary.....	2
2.0	Mandate, Vision and Values.....	5
3.0	Response to Minister's 2024-25 Letter of Direction	7
4.0	Strategic Directions	14
5.0	Implementation Plan.....	17
6.0	Overview of Current and Future Programs and Activities.....	24
7.0	Realty and Property Portfolio	37
8.0	Environmental Scan	38
9.0	Financial Budget.....	41
10.0	Performance Measures	46
11.0	Risk Identification	59
12.0	Human Resources and Staffing Plan	70
13.0	Information Technology and Electronic Service Delivery Plan	76
14.0	Initiatives Involving Third-Parties.....	80
15.0	Communications and Marketing Plan	89

1.0 Executive Summary

The Niagara Parks Commission is a board-governed operational enterprise agency of the Ontario Ministry of Tourism, Culture and Sport, operating under the provisions of the Niagara Parks Act. Niagara Parks was established in 1885 to preserve and promote the significant parklands along the Niagara River corridor – 56 kilometres from Fort Erie to Niagara-on-the-Lake, including the global tourism icon that is Niagara Falls.

As a self-funded agency, Niagara Parks strikes a balance between preserving the unique environmental features and rich cultural heritage of the Niagara River corridor, while offering authentic guest experiences that allow for a deeper appreciation and understanding of the significance of these lands. These two components of Niagara Parks' mandate are intrinsically linked; one cannot exist without the other. The revenues generated at Niagara Parks' natural attractions, locally sourced restaurants, heritage sites, retail stores, championship golf courses and parking facilities fund the organization's operations, including its environmental and cultural stewardship. In turn, the environmental and cultural heritage features of these lands allow for unique and authentic guest experiences that can only be delivered in Niagara Parks, helping to promote tourism and visitation to Niagara and the province.

Niagara Parks is proud of its role as key demand generator for tourism and will continue to invest in its properties and experiences over the course of 2024-2027, including a number of key projects that will enhance the experience and value of all of Niagara Parks' attractions, sites and services, while growing tourism to Niagara and the province of Ontario. Niagara Parks will be balancing its investments throughout 2024-27 to address both its revenue-generating operations, as well as the large number of unpaid public amenities the organization provides for the benefit of local residents and the visiting public.

Following a stronger year for tourism in 2023-24, Niagara Parks is anticipating \$158.3 million in earned revenue from all revenue sources, amounting to an annual surplus of \$30.9 million after interest and depreciation, over \$13 million higher than 2022-23 and \$19 million higher than what was initially projected. This financial success is measured against Niagara Parks' list of deferred maintenance which has grown significantly following the challenges of the COVID-19 pandemic that forced Niagara Parks to defer all but the most critical repairs. Moving forward, Niagara Parks is once again in a healthy financial position to be able to invest in its properties, proposing a capital budget for 2024-25 of \$69 million, including \$32.7 million toward deferred maintenance and \$36.3 million toward investments in strategic projects that align with Niagara Parks' 10-year Strategic Plan and its vision of becoming one of the most spectacular parks in the world.



In addition to its capital budget, Niagara Parks will be implementing an operating budget of \$120 million for 2024-25 divided among its departments which include standard operating expenses such as payroll, as well as key operational projects departments have planned.

For 2024-27, Niagara Parks will continue to place a focus across the organization on the unique experiences that set Niagara Parks apart from anywhere else in the world – its nature-based attractions. Investments into Niagara Parks' attractions will add more value to the guest experience and support new and repeat visitation, which in turn will support increased revenue generation for Niagara Parks. These revenues can then be invested back into its properties across the Niagara River corridor, including important environmental and cultural stewardship initiatives in support of Niagara Parks' mandate.

Beyond its internal investments, Niagara Parks will also be facilitating largescale private sector projects throughout 2024-27 that will act as revenue-generating opportunities for the organization, while providing new guest experiences to grow tourism to Niagara and the province.

These are the key Niagara Parks-funded projects the organization will be undertaking throughout 2024-27:

- Replacement of Niagara's Fury with new **Flying Theatre Attraction**
- Building on the guest experience at the **Niagara Parks Power Station**
- Significant upgrades to the tunnels at **Journey Behind the Falls**
- Continuation of **Table Rock Redevelopment** renovations, including opening of new **Table Rock Bistro**
- Improvements to infrastructure, amenities and interpretation at **White Water Walk**
- Improvements to the **Fort Erie Breakwall and Recreation Trail**
- Redevelopment of the **Niagara Parks Marina**
- Creation of a **skating loop** at the Floral Showhouse
- Upgrades to the tennis courts to offer both **tennis and pickleball** at **Queenston Heights Park**
- Development and launch of new semi-permanent **exhibit at the Butterfly Conservatory**
- Continued implementation of **brand strategy and wayfinding**
- Enhanced investments into **Winter Festival of Lights**
- Consolidation of **fleet and WEGO bus services**
- Launch of new **consumer website**
- Improvements to **cellular infrastructure** along the Niagara Parkway

These are the private sector projects and investments Niagara Parks will be facilitating and/or assessing throughout 2024-2027:

- Redevelopment of **Toronto Power Generating Station** (upper Niagara River overlooking the brink of Niagara Falls)
- Redevelopment of **Ontario Power Generating Station** (within the Niagara Gorge with views of the American and Canadian Horseshoe Falls)
- New **Visitor Transportation System** to augment WEGO bus system focused in Queen Victoria Park
- **Extension to lease agreement** with Niagara Adventure Excursions

The contents of this Business Plan expand upon the above-noted projects, as well as other priorities, projects and directions the organization will be implementing over the next three years, as informed by the priorities outlined in the Honourable Neil Lumsden, Minister of Tourism, Culture and Sport's Letter of Direction for Niagara Parks.

The summary of Niagara Parks' statement of operations for the current fiscal year and budget for the next three years is captured in the chart below.

Table 1 – Niagara Parks 2023-27 Statement of Operations

Table 1.1 2023 - 2027 STATEMENT OF OPERATIONS (thousands of \$'s)						
	CURRENT FISCAL YEAR			FUTURE YEARS		
	BUDGET	PROJECTED	VARIANCE TO BUDGET	BUDGET		
	Apr. 2023 Mar. 2024	Apr. 2023 Mar. 2024	Apr. 2023 Mar. 2024	Apr. 2024 Mar.2025	Apr. 2025 Mar.2026	Apr. 2026 Mar.2027
Total Revenue	\$121,894	\$158,259	\$36,365	\$162,265	\$168,077	\$172,589
Total Expenses	\$96,893	\$110,094	\$13,201	\$120,177	\$123,260	\$126,356
Net Surplus Before Interest & Depreciation	\$25,001	\$48,165	\$23,164	\$42,088	\$44,817	\$46,233
Loan Interest	\$1,703	\$1,580	(\$123)	\$1,387	\$1,223	\$1,009
Depreciation & Deferred Stimulus Funding	\$11,451	\$14,379	\$2,928	\$16,059	\$18,342	\$19,895
Net increase (Decrease) in Power Plant Obligation	\$300	\$1,300	\$1,000	\$1,300	\$1,300	\$1,300
Annual Net Surplus (Deficit)	\$11,547	\$30,906	\$19,359	\$23,342	\$23,952	\$24,029

2.0 Mandate, Vision and Values

The Niagara Parks Commission operates under the provisions of the Niagara Parks Act, R.S.O. 1990, Chapter N.3. Section 4 of the Act states “It is the duty of the Commission to manage, control and develop the Parks...” It also provides a list of 15 general powers and duties.

The Niagara Parks Commission is classified as a board-governed operational enterprise provincial agency of the Ministry of Tourism, Culture and Sport. Since its founding in 1885, Niagara Parks has been guided by two key principles:

1. Niagara Parks should not become a permanent financial burden on the Province. Niagara Parks operates in a self-supporting manner without the aid of operational government funding; and,
2. Access to the lands of Niagara Parks is to remain as free to the public as possible.

Niagara Parks’ Mandate

Since its establishment in 1885, Niagara Parks’ mandate has remained constant:

To preserve and promote the natural and cultural heritage along the Niagara River corridor.

Niagara Parks is responsible for the environmental and cultural stewardship of the lands along the Niagara River corridor, in addition to contributing to the economic success and growth of tourism to Niagara and the Province of Ontario.

Stewardship

The stewardship role assumed by Niagara Parks has remained essential to its accountabilities since its inception. Niagara Parks is expected to preserve and commemorate the historical, cultural and environmental significance of the Niagara River corridor. In order to sustain its operations and environmental and cultural stewardship responsibilities as a self-funded organization, Niagara Parks operates a number of revenue-producing attractions, restaurants, retail stores, golf courses, heritage sites and more.

Vision Statement

By 2028, Ontario’s Niagara Parks will be:

- A welcoming, accessible and inspiring place offering world-class natural, historical, and authentic experiences
- An innovative example of sustainability as the environmental and cultural stewards of the Niagara River corridor
- A source of national pride and identity
- One of the most spectacular Parks in the world



Values

In addition to Niagara Parks' mandate, the following corporate values were established:

Integrity

Needs

Safety and Security

Participation

Innovation

Respect

Environmental Responsibility

Diversity and Inclusion

3.0 Response to Minister's 2024-25 Letter of Direction

As an agency of the Ministry of Tourism, Culture and Sport, Niagara Parks directly supports the Ministry's mission of improving the quality of life and promoting economic growth by supporting and delivering tourism and cultural experiences.

In Minister Lumsden's Letter of Direction for Niagara Parks, a series of government-wide commitments for board-governed provincial agencies were outlined to guide operations for 2024-25. Additionally, Minister Lumsden identifies four specific priorities for Niagara Parks to address. The following section outlines how Niagara Parks will be delivering on these priorities through its financial strategies, capital and strategic projects, evidence-based decision making, Human Resources planning and overall approach to service delivery. This information is also expanded upon in the subsequent sections of this Business Plan.

- *Competitiveness, Sustainability and Expenditure Management*

While the 2023 tourism season exceeded expectations in terms of visitation levels and revenue growth, Niagara Parks is still very much in recovery following the impacts of the COVID-19 pandemic. The organization continues to examine cost containment measures where possible, including reducing administrative and other staffing costs and focusing on critical asset maintenance requirements.

As a board-governed operational enterprise provincial agency that generates its own revenue, Niagara Parks will continue to focus on promoting and investing in its highest revenue-producing operations, which are its attractions. Over the course of 2024-2027, Niagara Parks will be replacing its Niagara's Fury attraction on the top floor of Table Rock with a new flying theatre experience. Niagara Parks will also open a new culinary offering, the Table Rock Bistro, that will showcase Niagara VQA wine, craft beer and spirits, alongside a locally sourced menu. Table Rock Centre is Niagara Parks' highest revenue generating facility, and these additions represent the final stages of the multi-year, \$25 million redevelopment that Niagara Parks has undertaken at the site. These new experiences, in addition to other recent renovations over the past five years, will help drive new and repeat visitation to the iconic tourism building at the brink of the Falls.

Each year, Niagara Parks establishes a rates and fees strategy for its products and services to ensure value for money for guests, consistency with industry benchmarks and to maximize margins and revenues to support the financial health of the organization. By introducing a new three-tier model for attraction packages, Niagara Parks has been able to increase its average sale and overall revenues, despite transaction numbers still not reaching pre-pandemic levels.

Niagara Parks will also be continuing its partnerships with various organizations to host brand-aligned public events that contribute to generating revenue and raising the profile of Niagara Parks, including the Niagara Grape & Wine Festival's Niagara Icewine Gala at the Niagara Parks Power Station.



Additionally, Niagara Parks will be moving forward largescale private sector projects that represent a significant positive financial impact for the organization, including the redevelopment of the historic power stations and the development of a new Visitor Transportation System in Queen Victoria Park.

As guided by its medium-term recovery plan, Niagara Parks will continue to work with staff across all departments to consolidate operations where feasible, increase staffing efficiencies and review process improvements to reduce associated costs. Moving forward, the focus will remain on front-line service delivery, redeployment/training and continued identification of administrative efficiencies across the organization.

In 2024-25, Niagara Parks will be conducting an operational review of its retail department to assess current functions; review resource allocations, including staffing, fleet, equipment and supplies; benchmark costs where applicable with industry standards; recommend future functions and operational structure; identify cost savings and develop KPIs that can be used by the CEO to assess the impact of the review and future changes.

With the successful relaunch of the Niagara Parks Foundation, Niagara Parks will continue to explore funding opportunities to support its environmental and cultural stewardship work, such as the Environmental and Ecological Enhancement Initiative at Dufferin Islands funded by TD Bank through the Niagara Parks Foundation.

- *Transparency and Accountability*

Niagara Parks is committed to openness and transparency, which guides all communications initiatives. This commitment is demonstrated through the distribution and timely publication of Niagara Parks' Annual Report and Audited Financial Statements, publication of meeting agendas, reports, minutes expense reports, and media releases on Niagara Parks' website. Niagara Parks will continue to deliver presentations to local municipal councils and service clubs, as well as identify speaking opportunities to inform elected officials and stakeholders on upcoming plans and opportunities. Niagara Parks will also continue to actively engage the public on key initiatives and projects through the use of both on-site and virtual public information sessions and incorporate feedback gathered into its decision-making processes. Niagara Parks will also continue to expand its distribution of e-newsletters to share updates and information to a variety of audiences, including a dedicated local residents' newsletter.

- *Risk Management*

Please see risk management schedule included in the Risk Identification section.

- *Workforce/Labour Management*

For the 2024-25 fiscal, Niagara Parks will continue to deploy a workforce planning process to identify operational needs, assessing revenue generation and visitation levels to determine minimum and extended staffing requirements across its business units, with a priority on front-line staffing and staffing redeployment to meet visitation demand.



Niagara Parks developed a new Talent Acquisition and Retention Plan in response to the significant labour shortages in the tourism, retail, hospitality and food services sectors. As Niagara Falls is a major tourism destination, there is a lot of competition for talent, particularly with private sector corporations who have the ability to offer financial advantages and other incentives to potential candidates. Niagara Parks is positioning our brand as a focal point of recruitment and retention. For full details on Niagara Parks' Human Resources, see section 12.

- *Diversity and Inclusion*

Niagara Parks will continue to implement the strategies and approaches established in its Talent Acquisition and Retention Plan and Committee, which recognizes the diversity of the Niagara region and visiting demographics, while embracing inclusion and ensuring equal opportunity.

- *Data collection, Sharing and Use*

Niagara Parks will assess the feedback collected from its 2023 data collection mechanisms, continuing to identify trends and implement operational changes as needed. An example of action taken in response to guest feedback, Niagara Parks will be increasing service levels across its sites for 2024-25 and piloting extended hours of operation for its attractions, beginning with Journey Behind the Falls. If successful, Niagara Parks will look at other locations to extend hours of operation based on guest feedback, visitation patterns and to alleviate congestion within peak hours.

Over 2024-27, Niagara Parks will continue to offer digital guest surveys for attraction pass purchasers that include questions based on value, ease of purchase process and overall experience. An analysis of this data collection method is included in the Performance Measures section of this Business Plan. Niagara Parks will be assessing additional methods of data collection for 2024-27 to increase its sample size, including the potential of onsite digital survey collection at key areas such as Table Rock Centre.

Niagara Parks' Guest Services Centre will also continue to collect comprehensive data sets as the main point of contact for all incoming guest inquiries. In collaboration with Niagara Parks' Communications and Marketing team, this data is analyzed regularly to identify trends and make adjustments accordingly, from adding content to Niagara Parks' website to operational changes for front-line staff.

In addition to these consumer channels, Niagara Parks has shifted from in-person public information centres to a virtual approach that allows for greater flexibility for the public, increased attendance and more comprehensive data collection. This approach will continue throughout 2024-2027 and will be used to gather important feedback regarding key projects such as the redevelopment of the power stations, the Visitor Transportation System and the redevelopment of the Niagara Parks Marina.

Niagara Parks has also continued to integrate new data collection and monitoring practices across its internal operations, including new fiscal management and reporting capabilities made possible by the continued implementation of its Enterprise Resource Planning Software. These practices allow for greater visibility and understanding of Niagara Parks' changing visitor demographics and patterns to contribute to evidence-based decision making across the organization.



- *Digital Delivery and Customer Service*

A key initiative regarding digital delivery for 2024-2027 will be the redevelopment of Niagara Parks' consumer website, to be launched in 2025. To prepare for this project, Niagara Parks has begun a comprehensive audit of its current website to identify gaps and areas for improvements, while also undertaking market research. Following a public procurement process, Niagara Parks' internal project team will work with the identified vendor to create a new consumer website that achieves the following objectives:

- Deliver an industry-leading user experience that converts visits to online sales
- Leverage in-house photo and video production resources for impactful visual storytelling
- Build Niagara Parks brand awareness and communicate successes that support its mandate for environmental and cultural stewardship
- Provide a full 1:1 French language user experience that is compliant with FLSA requirements

Additionally, over the course of 2024-2027, Niagara Parks will be working with a third-party vendor to install cellular infrastructure on its properties to improve cellular connectivity for guests when visiting Niagara Parks. This work will help solve longstanding issues with cellular coverage at Niagara Parks, resulting from its proximity to the US border.

Following the COVID-19 pandemic, Niagara Parks updated its customer service training materials to ensure staff are well-informed of Niagara Parks' customer service requirements and equipped to successfully engage with the public across a variety of roles and workplaces, from front-line to operations staff. The training will be delivered as part of Niagara Parks' new employee orientation sessions and annual training for existing staff. Employee training is also a key area of focus for Niagara Parks' Talent Acquisition and Retention Committee.

In addition to the government-wide priorities identified for board-governed provincial agencies, the following priorities were outlined that are specific to the Niagara Parks Commission:

- *Seek to maximize the potential of the Niagara Parks Commission's property portfolio while preserving and protecting the natural and cultural heritage of the Niagara River corridor including through the redevelopment of the Toronto Power Generating Station and the Ontario Power Generating Station.*

A key project throughout 2024-27 will be the redevelopment of the two remaining historic power stations on Niagara Parks property, Toronto Power Generating Station and Ontario Power Generating Station. Following a three-stage public procurement process that began in the fall of 2021, Niagara Parks has identified a successful proponent for the redevelopment of Toronto Power. A Letter of Intent has been signed, commencing a 120-day due diligence phase that includes the development of heritage studies (Heritage Impact Assessment, Cultural Heritage Evaluation Report, Strategic Conservation Plan), environmental and archaeological assessments, consultations and contract negotiations. The conclusion of the due diligence phase will be in the spring/summer of 2024, followed by a ground-breaking event and announcement that begins the three-year construction period. A grand opening is targeted for summer/fall 2027.



In alignment with the goals and priorities of the Ministry of Tourism, Culture and Sport, Niagara Parks has established four project goals for the redevelopment of Toronto Power:

- Restoration of the heritage building (designated National Historic Site)
- Creation of a new guest experience that does not exist in Niagara nor Ontario today
- Payment of rent to Niagara Parks while covering all restoration and redevelopment costs
- Significant capital investment that has an extensive economic impact for Niagara and Ontario

The proposed \$200+million investment and redevelopment plans will transform Toronto Power into a location-defining new visitor experience that is unlike anything currently offered in Niagara Falls, nor the province of Ontario. This will be an entirely private sector investment to restore and reimagine a piece of public history, generating new demand for tourism to the destination and the entire province. A long-term land lease agreement will be negotiated with Niagara Parks remaining a strategic partner throughout construction and future operation, similar to other existing arrangements Niagara Parks has with tenant partners Niagara City Cruises who operate the boat tour experience and Niagara Adventure Excursions who operate the Zipline to the Falls and the Whirlpool Adventure Course.

The economic impact to Niagara and Ontario includes an upfront private capital investment of \$200+ million, resulting in the attraction of a new tourism market to Niagara Parks, Niagara Falls, the Niagara region and Ontario. Estimations for the first nine years (four years of construction and five first years of operation) include:

- Gross Domestic Product (GDP) impact: \$300 million
- Employment: 9,531 jobs created (1,059 per annum)
- Taxes to all three levels of government: \$98 million

Niagara Parks is also in the evaluation stage of the procurement process for the redevelopment of Ontario Power Generating Station. Though not yet at the public announcement stage, the proposal for the redevelopment of Ontario Power will be another substantial private sector investment and long-term lease agreement resulting in the introduction of another new visitor experience for the destination. Niagara Parks will continue to work closely with Minister's Office and Ministry staff as these projects progress to ensure open lines of communication and opportunities for collaboration.

Niagara Parks' property portfolio is expanded upon in the Realty and Property Portfolio section of this Business Plan.

- *Work collaboratively with the Ministry on new product development and land management, seeking related approvals as needed*

Niagara Parks will continue to work collaboratively to keep the Ministry informed on new product development and land management initiatives through regular reporting mechanisms and other opportunities. In 2024-2027, Niagara Parks will open a brand-new Flying Theatre attraction at Table Rock Centre to replace the Niagara's Fury 4-D attraction that has reached the end of its lifecycle. The Flying Theatre concept aligns with Niagara Parks' brand and mandate, emphasizing authentic experiences and an appreciation for the natural and cultural heritage of the Niagara River corridor.



The project to replace Niagara's Fury is part of the broader Table Rock Redevelopment Project that has included extensive renovations at Niagara Parks' iconic tourism facility at the brink of the Canadian Horseshoe Falls. Opening on the top floor of Table Rock in the spring of 2024 will be Niagara Parks' newest dining experience, the Table Rock Bistro. The Bistro will be an opportunity to showcase Niagara's world-class food and beverage sectors, featuring Niagara VQA wine, craft beer and spirits, alongside a locally sourced menu.

Also in 2024-2027, Niagara Parks will be adding new experiences and exhibits at the Niagara Parks Power Station, building on the initial success and buzz the attraction has generated in its first two years of operation. In the spring of 2024, Niagara Parks will be enhancing the evening experience at the power station, including the addition of new dynamic lighting to the Tunnel. There will also be modifications to the Currents sound and light show to offer guests more flexibility and convenience to provide a more seamless new overall nighttime experience at the power station.

Niagara Parks will also be opening up more of the power station to the public, including the original control room to provide a richer guest experience. There will also be a new self-guided multilingual audio tour option available to guests as a value-add, in addition to the paid guided tour experience. Niagara Parks is also exploring the addition of new exhibits, including a traveling exhibit from the Tesla Museum in Belgrade, Serbia.

As guided by its Medium-Term Recovery Plan and updated Realty Policy, Niagara Parks will continue to work with the Ministry on land transaction matters and seek appropriate approvals as required.

- *Support government priorities related to growing tourism in the Niagara Region.*

Both in support of its own mandate to promote and preserve the environmental and cultural heritage of the Niagara River corridor and the priorities of its Ministry as an operational enterprise agency of the government of Ontario, Niagara Parks has been committed to growing tourism to the Niagara region from inception. From the five strategic goals that guide the organization's operations and business planning to the specific capital and strategic investments outlined in its annual budget and the Implementation Plan, the 2024-2027 Business Plan illustrates how Niagara Parks will be investing in its facilities and leveraging its properties to enhance the guest experience and grow tourism to Niagara.

In addition to projects previously outlined in the above sections and expanded upon in this Business Plan, Niagara Parks has begun a public procurement process to seek innovative and sustainable ideas from the private sector for a new visitor transportation system that will link key Niagara Parks sites and attractions within the core Queen Victoria Park area. Over the last several years, Niagara Parks has made significant investments in its guest experiences particularly within the Queen Victoria Park area which covers the lands immediately around Niagara Falls and houses a majority of Niagara Parks' top attractions, restaurants and sites. There is now the opportunity to further enhance the guest experience within this area with a new and modern visitor transportation system that builds on the current WEGO bus system. As a result of the public Request for Proposals (RFP) that was issued in the summer of 2023, Niagara Parks will be exploring options for a new visitor transportation system during this business planning cycle.



- *Collaborate with industry stakeholders and other agencies and attractions to promote the growth of the tourism industry in Ontario.*

As a key demand generator for tourism to Niagara and the province as a whole, Niagara Parks plays a pivotal role in the growth of the tourism industry in Ontario. Niagara Parks regularly collaborates with local industry and destination stakeholders, as well as sister agencies across Ontario to promote tourism initiatives. Niagara Parks will continue its partnership with Metrolinx to offer bundled packages that combine roundtrip transportation on GO Transit to Niagara with the WEGO hop-on, hop-off bus service. This is a key agency-to-agency partnership that both increases ridership on GO Transit and brings more guests from the GTA to Niagara to experience all that this region has to offer.

In the summer of 2023, Niagara Parks opened a pop-up retail store and welcome centre in the Fallsview Casino, the result of continued collaborations between two of Niagara's top tourism organizations. The retail store is an opportunity to sell high-quality Niagara Falls and Niagara Parks-themed merchandise, as well as attraction tickets and packages for Niagara Parks experiences within a popular tourism location at the Fallsview Casino. In 2024-27, Niagara Parks will continue to operate an expanded retail store to provide a significant presence for Niagara Parks in this location with a larger store footprint that includes more products and merchandise and a better shopping experience for guests.

Also, to improve communication lines and increase collaboration opportunities, Niagara Parks launched a new monthly stakeholder e-newsletter distributed to a variety of audiences and sales markets. The newsletter helps to keep key stakeholders informed about new products and events to share with their clients and guests, as well as updates about important projects, upcoming infrastructure investments, environmental initiatives and more.

4.0 Strategic Directions

Strategic Plan (2018-2028)

Niagara Parks' 10-year Strategic Plan (2018-2028) is a reflection of its historic mandate of environmental and cultural stewardship and role as a demand generator for tourism, combined with strategic directions that will guide the organization to its goal of becoming one of the most spectacular Parks in the world.

The strategic plan, as developed and launched in 2018, supports Niagara Parks' founding principles of financial self-sufficiency and as-free-as-possible public access by increasing revenue and employment opportunities, ensuring ongoing maintenance, preserving the Niagara River corridor and contributing to the economic well-being of the region and province.

By 2028, Ontario's Niagara Parks will be:

- A welcoming, accessible and inspiring place offering world-class natural, historical, and authentic experiences
- An innovative example of sustainability as the environmental and cultural stewards of the Niagara River corridor
- A source of national pride and identity
- One of the most spectacular Parks in the world

Themes

In order to achieve this vision statement, the following themes inform the operations, decision-making and overall direction of the organization:

- Preserving and showcasing our rich heritage, culture and lifestyle
- Leveraging and activating our natural wonders and iconic experiences
- Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being
- Taking experiences and hospitality to the next level

Strategic Goals

Additionally, as outlined in its medium-term recovery plan from March 2021, Niagara Parks has identified five strategic goals designed to usher the organization through its recovery following the financial impacts of the COVID-19 pandemic. These strategic goals provide a targeted and operational lens to Niagara Parks' work in delivering the themes of its Strategic Plan and achieving its mandate of promoting and preserving the environmental and cultural heritage of the Niagara River corridor.

These strategic goals are expanded upon in the Performance Measures section of this Business Plan, which includes examples of Niagara Parks' action plans to achieve these goals, along with supporting data.



Strategic Goal #1: Developing and Nurturing Great Guest Experiences

Niagara Parks has a long history of managing a variety of experiences that comprise both revenue-producing and free services to visitors. While Niagara Parks has a diversity and breadth of services and offerings, from its retail stores to its locally sourced restaurants, the essence of why the Niagara Parks Commission was established in 1885 remains the same reason why guests continue to visit Niagara Parks today – to authentically experience the natural environment and cultural heritage of the Niagara River corridor.

Through Niagara Parks' paid attractions and free services, guests are able to experience the natural wonder of the Falls and the Niagara River from all perspectives. Niagara Parks' nature-based attractions are rooted in history, from the centuries-old tunnels that make up Journey Behind the Falls to the Whirlpool Aero Car that was first introduced by famed Spanish Engineer Leonardo Torres Quevedo in 1916. Niagara Parks' newest attraction, the Niagara Parks Power Station and Tunnel, despite first opening to the public in 2021, was built in 1905 and has been part of the cultural landscape of Niagara Falls for over a century.

While Niagara Parks has achieved financial success due to increases in visitation from a number of markets, the financial climate is still very much uncertain, along with the timelines for the full return of several key international markets due to global tensions. Understanding this and other key shifts witnessed throughout the tourism industry, Niagara Parks is focused on investing in improvements that add increased value to both its revenue-producing and free experiences for guests.

Throughout 2024-27, Niagara Parks will focus on positioning and leveraging the authentic uniqueness of its attractions and experiences to support new and repeat visitation.

Strategic Goal #2: Growing Revenue

As a self-funded organization, Niagara Parks will continue to explore new opportunities to grow revenue beyond its already established revenue streams. Niagara Parks generates a large majority of its revenue from its attractions and other revenue-producing operations particularly during the summer months, which can make the organization vulnerable to global trends that impact tourism activity, as exemplified by the COVID-19 pandemic. While many of Niagara Parks' costs such as policing, parks and road maintenance are fixed in nature, the majority of Niagara Parks' revenues are variable and dependent on visitation. As a result, Niagara Parks is focused on diversifying its revenue stream and expanding revenue growth opportunities beyond the traditional summer tourism season to protect its resiliency moving forward.

Strategic Goal #3: Expanding our Digital Service Delivery

In alignment with priorities of the Ministry and trends reported through Destination Canada and witnessed across Niagara Parks' own channels, throughout 2024-27, Niagara Parks will be undertaking several key initiatives focused on expanding our digital service delivery and leveraging our digital channels to increase brand awareness and drive visitation, in turn increasing revenue levels. With the digitization shifts across the globe, there is great opportunity for Niagara Parks to leverage its online presence, social media channels and digital marketing strategies to drive traffic to Niagara Parks' digital sales funnel. Additionally, as tourism has resumed following the pandemic, guest expectations have also changed. Niagara Parks' initiative to improve the cellular infrastructure



across its properties to facilitate better network and WiFi access serves both an operational function to improve Niagara Parks' systems and processes, but also a critical guest experience function that will ensure Niagara Parks' ability to meet and exceed the expectations and needs of our guests in this regard.

Strategic Goal #4: Strengthening Collaborations with Partner Organizations

Niagara Parks maintains close relationships with many different partner organizations, as illustrated in the table provided in the Third-Party Agreements section. Niagara Parks is proud to be part of a strong and resilient tourism community within Niagara and has strengthened and formalized its partnerships with a number of destination stakeholders over the past few years. Collaborating with like-minded organizations provides numerous benefits both from a cost and resource-sharing perspective, as well as the ability to provide increased value for guests. Across the organization's diverse business units, Niagara Parks will continue to prioritize and grow its existing partnerships while identifying additional collaborative opportunities.

Strategic Goal # 5: Ensuring Strong Fiscal Management

Strong fiscal management is an essential component of Niagara Parks' operations and decision-making across the organization. As Niagara Parks' attendance and revenues have grown, so too have its commensurate expenses and costs associated with maintaining service levels at all of its properties. Through its Financial Management Services, Niagara Parks remains focused on constantly monitoring all financial activity and producing monthly cash flow predictions and financial statements for review. While Niagara Parks enters 2024-27 in a stronger financial position with the ability to once again substantially reinvest in its properties and guest experiences, Niagara Parks will continue to implement many of the fiscal management strategies introduced during the pandemic to conserve its finances, streamline processes and identify opportunities for cost-savings.

5.0 Implementation Plan

The following section expands upon the key strategic projects that will be undertaken by Niagara Parks in this business planning cycle (2024-2027).

In addition to budgeting for its regular operations and deferred maintenance, Niagara Parks also undertakes strategic investments to fund projects aimed to help advance the themes of the Strategic Plan and enhance the experience of its guests across the 56-kilometre Niagara River corridor. These projects are determined based on a variety of factors including revenue-generating potential, identified need, guest feedback and alignment to brand, mandate and priorities of the Ministry of Tourism, Culture and Sport.

The strategic projects that will be undertaken by Niagara Parks are categorized under attraction renewal and guest experience enhancements. Targeted strategic investments in Niagara Parks' revenue-generating attractions are captured under attraction renewal, whereas projects related to Niagara Parks' public amenities, services and other guest experiences are categorized separately.

Alongside projects that will be funded through Niagara Parks' earned revenue as a self-funded organization, Niagara Parks will also be facilitating largescale projects with substantial private sector investments, designed to grow tourism and provide incredible economic and social benefits, for the destination, the Niagara region and the province of Ontario.

Niagara Parks will also be undertaking a number of additional key projects throughout 2024-27 that are outlined in the operational budgets and plans within its internal business units, which also includes its environmental and cultural stewardship work. These are captured in the Overview of Current and Future Programs and Initiatives section.

The following are the key strategic projects to be undertaken by Niagara Parks in 2024-27:

Improvements to Revenue Generating Operations

Replacement of Niagara's Fury with new Flying Theatre Attraction

Beginning in the winter of 2024, Niagara Parks will start renovations to the retail, washrooms and ticketing area that support the current Niagara's Fury attraction on the top floor of Table Rock Centre. The renovations align with recent construction that has taken place at the site as part of the Table Rock Redevelopment Project that has updated the expansive tourism facility that houses Niagara Parks' signature retail store, Table Rock Shop, Table Rock House Restaurant, Table Rock Market (quick serve), as well as Niagara Parks' top attraction, Journey Behind the Falls and Niagara's Fury, an attraction that has reached the end of its lifecycle.

Niagara Parks will be redeveloping Niagara's Fury and replacing it with a Flying Theatre attraction that simulates the sensation of flying over iconic landmarks and stunning scenery, while providing both entertainment and educational value for guests of all ages. Niagara Parks has identified a successful proponent to develop the new attraction in collaboration with Niagara Parks staff. Niagara's Fury will operate through to Labour Day 2024, after which time it will cease operations and



construction will begin on the new attraction. Niagara Parks plans to open the new attraction in fiscal 2025-26.

Additions to the guest experience at the Niagara Parks Power Station

Throughout 2024-2027, Niagara Parks will be investing in additions to its newest visitor experience, the Niagara Parks Power Station and Tunnel. Beginning in the spring of 2024, guests will be able to enjoy an all-inclusive evening experience at the power station, in addition to daytime admission, that will include improvements to the existing sound and light show Currents and new lighting to incorporate the Tunnel as part of the nighttime experience.

Niagara Parks is preparing to launch a multilingual audio tour as a value add for all guests to the power station, as well as working with partners to bring new interactive exhibits including a temporary exhibit from the Tesla Museum in Belgrade, Serbia. Additionally, Niagara Parks has infrastructure improvements planned for the site including opening up the original control room for guest access, heating the viewing platform at the end of the Tunnel to support greater year-round experiences, as well as a window replacement program.

Significant upgrades to the tunnels at Journey Behind the Falls

Niagara Parks will be investing in significant upgrades to the tunnel experience at its oldest and top revenue-generating attraction, Journey Behind the Falls. Building on renovations completed in 2023-24 to renovate the queueing areas of the attraction, which created a new visitor gallery featuring exhibits that tell the history of Niagara Falls, Niagara Parks will now be addressing needed updates within the tunnel network of the attraction.

From an infrastructure and servicing standpoint, Niagara Parks will be upgrading the electrical servicing, refinishing the interior walls, adding new LED lighting and restoring an additional tunnel lookout. Work will also include the development of a new heated viewing platform that is able to support an improved year-round experience at the attraction, as well as new interpretation and exhibit material within the tunnel.

Continuation of Table Rock Redevelopment renovations, including opening of new Table Rock Bistro

Construction to renovate the former Pop & Lolly's shop on the top floor of Table Rock Centre, across from Table Rock House Restaurant, will transform the space into Niagara Parks' newest culinary offering at its top revenue-producing location, the Table Rock Bistro. The Bistro will showcase Niagara VQA wine, craft beer and spirits, alongside a locally sourced menu that will offer guests another culinary option at Table Rock positioned between the fine dining at Table Rock House and fast casual offerings of Table Rock Market. This is part of the broader Table Rock Redevelopment Project, which has seen the complete renovation of Niagara Parks' iconic tourism facility and top revenue-generating site. The Table Rock Bistro will open in the summer of 2024.



Improvements to infrastructure, amenities and interpretation at White Water Walk

Niagara Parks will be improving the exterior of the building at its White Water Walk attraction, including new signage and the addition of a shade structure for the visitor queuing area. Work will also include the interior with a new retail layout and fixturing and new public washrooms. For the attraction itself, Niagara Parks will be adding new interpretation elements, as well as widening and improving code compliance of the boardwalk while adding new viewing platforms and enhancements.

Guest Experience and Infrastructure Enhancements

Improvements to the Fort Erie Breakwall and Recreation Trail

Constructed in the early 1950s as a means of shoreline protection and to establish parklands to provide public access to the river's edge, the Fort Erie breakwall extends for 2 kilometres along the Niagara River running north from Niagara Parks' Old Fort Erie to beyond the Peace Bridge. Over the past seven years, large sections of the wall have been severely damaged due to extreme weather events. Intermediary repairs and replacement work has been undertaken, but the breakwall continues to be vulnerable to significant damage. Additionally, the Niagara River Recreation Trail is also consistently impacted by extreme weather events in this area, resulting in ongoing flooding issues.

Throughout 2024-2027, Niagara Parks will be assessing options for alternative shoreline designs that are more resilient to severe storm events while continuing to achieve the original objective of providing public access to the water and a recreational trail experience. To reduce the ongoing challenges related to maintaining the recreation trail in the area, Niagara Parks will be realigning a 250-metre section of the trail onto higher ground, closer to the Niagara Parkway.

Redevelopment of the Niagara Parks Marina

Niagara Parks will be significantly investing in its marina property along the south Niagara Parkway over the course of this business planning cycle. Niagara Parks has operated a marina at this location since the 1960s, offering a number of dock slips and modest amenities to patrons. As the only marina facility on the Canadian side of the upper Niagara River, the Niagara Parks Marina has the potential to serve as a new destination for leisure tourism on the south Niagara Parkway. Niagara Parks will be investing to redevelop the marina using a design-build approach, to create a regionally unique, recreation destination appropriate to its parkway and historical river setting. A key component of the redevelopment plans will be increasing public access and use of the marina.

The marina will benefit the surrounding community, including facilitating public access to the upper Niagara River shoreline, while driving new visitation to the area, supporting tourism and economic growth for Niagara Parks, Fort Erie and the region. The redevelopment plans will increase the number of seasonal and transient boat slips, in addition to adding new public amenities to support increased visitation, such as a restaurant and patio, public washrooms, a public boat launch, infrastructure to support fishing charters/excursions and more.



Niagara Parks is aiming to launch the Request for Proposals (RFP) for the design-build stage in January 2024 with plans for construction to begin in the fall of 2024 through to spring 2026. Niagara Parks aims to operate the marina for boaters in 2024 but will not be available for boaters in 2025 due to construction. The grand reopening of the Niagara Parks Marina is planned for the spring/summer of 2026.

Creation of a skating loop at the Floral Showhouse

Niagara Parks will be exploring the development of a new recreational winter skating loop at its Floral Showhouse location to expand winter visitor demand generation and activities, while continuing to grow the Winter Festival of Lights (WFOL) program. The new skating loop will be built in the Artist Garden and provide excellent connection points to nearby attractions including the Floral Showhouse itself and the Niagara Parks Power Station. The new skating loop is planned for the winter of 2026.

Upgrades to the tennis courts at Queenston Heights Park

Niagara Parks will be investing in needed repairs and upgrades to the tennis courts at Queenston Heights to offer both tennis and pickleball at the beloved community park. Tennis courts have existed at the site for approximately 100 years. Niagara Parks will be investing in the resurfacing of the courts, new perimeter fencing, as well as an accessible walkway connection to the parking lot and existing guest washrooms. Niagara Parks plans to redevelop the courts in two phases split between fiscal 2024-25 and 2025-26, with plans to open the courts in the spring of 2025.

Development and launch of new semi-permanent exhibit at the Butterfly Conservatory

Niagara Parks will be launching a new semi-permanent exhibit at the Butterfly Conservatory within the existing multi-purpose room at the site. In the past, Niagara Parks has hosted traveling exhibits in this space and this project will develop an exhibit unique to the Niagara Parks Butterfly Conservatory. Niagara Parks is working with sister agency Science North to develop the new exhibit with plans to launch in the spring of 2026.

Continued implementation of brand strategy and wayfinding

Niagara Parks will be continuing to implement its wayfinding strategy to provide consistent and cohesive signage and an enhanced overall presence for Niagara Parks' brand across the entire Niagara River corridor. Priorities for 2024-2027 include continuing to replace outdated signage across the Parks and prioritization of addressing signage gaps and opportunities within the core area of Queen Victoria Park. Niagara Parks will be exploring the potential of banner signage across its properties to delineate certain areas within Niagara Parks and help establish more of a presence for its brand and sense of place.



Enhanced investments into Winter Festival of Lights

Niagara Parks will be increasing its investment and taking over full ownership and control of its portion of the destination-wide Winter Festival of Lights, which is one of the main drivers for tourism during the winter season. Niagara Parks has been a partner and host site of the Winter Festival of Lights for over 40 years. With the dissolution of the organization behind Winter Festival of Lights in 2019, Niagara Parks will be increasing ownership of its portion of the festival to better align with its brand and strategic objectives. This increased investment will allow Niagara Parks to source and own the lighting displays on its property, allowing for greater points of connection and alignment across Niagara Parks' entire winter programming.

Consolidation of fleet and WEGO bus services

To facilitate greater operational efficiencies and better use of existing space, Niagara Parks will be expanding its WEGO bus garage to accommodate its fleet vehicle garage in one consolidated space. This will allow for the sharing of equipment and labour to provide operational efficiencies and cost savings for the organization. The new consolidated garage will also include a new wash station and potentially an in-house oil spraying system to reduce the costs of subcontracting this service. The vacated vehicle garage space will be repurposed as future administrative office space to bring together essential services within the Maintenance Centre building site.

Development and launch of new consumer website

Over the course of 2024-27, Niagara Parks' Communications and Marketing team will be developing and launching a new consumer website. To prepare for a winter 2025 launch, Niagara Parks has begun a comprehensive audit of its current website to identify gaps and areas for improvements, while also undertaking market research. Based on the high volume of guests that visit our website from mobile devices and reflecting the improvements to cellular infrastructure across Niagara Parks taking place in 2024-25, this will be the first consumer website that is developed as a mobile-first solution. Following a public procurement process, Niagara Parks' internal project team will work with the identified vendor to create a new consumer website that achieves the following objectives:

- Deliver an industry-leading user experience that converts visits to online sales
- Leverage in-house photo and video production resources for impactful visual storytelling
- Build Niagara Parks brand awareness and communicate successes that support its mandate for environmental and cultural stewardship
- Provide a full 1:1 French language user experience that is compliant with FLSA requirements

Improvements to cellular infrastructure to enhance cellular coverage

Beginning in 2024-2025, Niagara Parks will be working with a third-party infrastructure provider to improve cellular coverage across the Niagara River corridor. This initiative will help solve long-standing issues related to Canadian cellular coverage due to Niagara Parks' properties' proximity to the US border. Following a public procurement process, Shared Tower Inc. was selected as the third-party vendor to install and operate telecommunications infrastructure at various locations across Niagara Parks properties to improve cellular coverage and access to third-party high-speed



internet for visitors, Niagara Parks operations and stakeholders, across the entire 56-kilometre Niagara River corridor. A demonstrated leader in the telecommunications industry in Canada, Shared Tower will be working with Niagara Parks, as well as applicable governing land use authorities, local stakeholders, and residents to develop an implementation plan for the new infrastructure.

Private Sector Investments

Redevelopment of Toronto Power and Ontario Power Generating Stations

Niagara Parks has three historic power stations on its property – Toronto Power Generating Station, Ontario Power Generating Station and the former Canadian Niagara Power Generating Station, now the Niagara Parks Power Station. After opening the Niagara Parks Power Station and Tunnel, with support from the Government of Ontario through a repayable loan, as its newest must-see attraction, Niagara Parks is continuing with the redevelopment of both the Toronto Power and Ontario Power Generating Station.

Niagara Parks launched its three-stage procurement process for both Toronto Power and Ontario Power in the fall of 2021. For Toronto Power, following an internal evaluation stage with legal services provided by Fasken and financial advisory services by Ernst & Young LLP, Niagara Parks' Board of Commissions approved the signing of a Letter of Intent with the successful proponent – Pearle Hospitality. The Letter of Intent commences a 120-business day due diligence phase, which is set to conclude in the spring of 2024. This will be a transformational private sector investment of over \$200 million that will restore and reimagine the historic Toronto Power as a world-class new visitor experience for the destination. Following the due diligence phase, a groundbreaking will take place in the spring/summer of 2024, followed by a planned three-year construction period and grand opening in 2027.

For Ontario Power, Niagara Parks remains in the evaluation stage. ~~and expects to announce a successful proponent by the close of the 2023-24 fiscal year.~~

Visitor Transportation System

Niagara Parks is looking to the private sector for innovative and sustainable ideas for a new visitor transportation system that will link Niagara Parks sites and attractions within the core tourism area of Queen Victoria Park. The public procurement process was launched in the summer of 2023 with a Request for Proposals (RFP). The new visitor transportation system will augment the current WEGO bus system, providing a value-add and enhanced guest experience within Queen Victoria Park, which houses a majority of Niagara Parks' top attractions, sites and experiences. The new visitor transportation system will:

- Enhance the overall guest experience by allowing seamless travel and connection between Niagara Parks sites, while also acting as a new visitor attraction and demand generator for the area.



- Present an environmentally sustainable and fully accessible solution that decreases carbon emissions and improves traffic congestion and visitor flow by reducing the number of vehicles within Queen Victoria Park.
- Provide an additional revenue stream for Niagara Parks, while reducing operating expenses.

In 2024, Niagara Parks will assess the results of the public procurement process and continue to explore options for what a new visitor transportation system could look like in Queen Victoria Park.

Zipline Lease Extension

Niagara Parks' tenant and attractions partner Niagara Adventure Excursions Inc. (NAE) who operate the Zipline to the Falls and the Whirlpool Adventure Course attractions on Niagara Parks property, is planning to invest \$1 million into its attractions and has requested an additional five years to their land lease agreement. The OIC has been approved and the land lease agreement extended. NAE is planning to invest an additional \$1 million into the Zipline to the Falls attraction to increase visitor throughput and efficiencies that will add to the experience of guests at this attraction and in turn, increase revenue generation for NAE and Niagara Parks.

6.0 Overview of Current and Future Programs and Activities

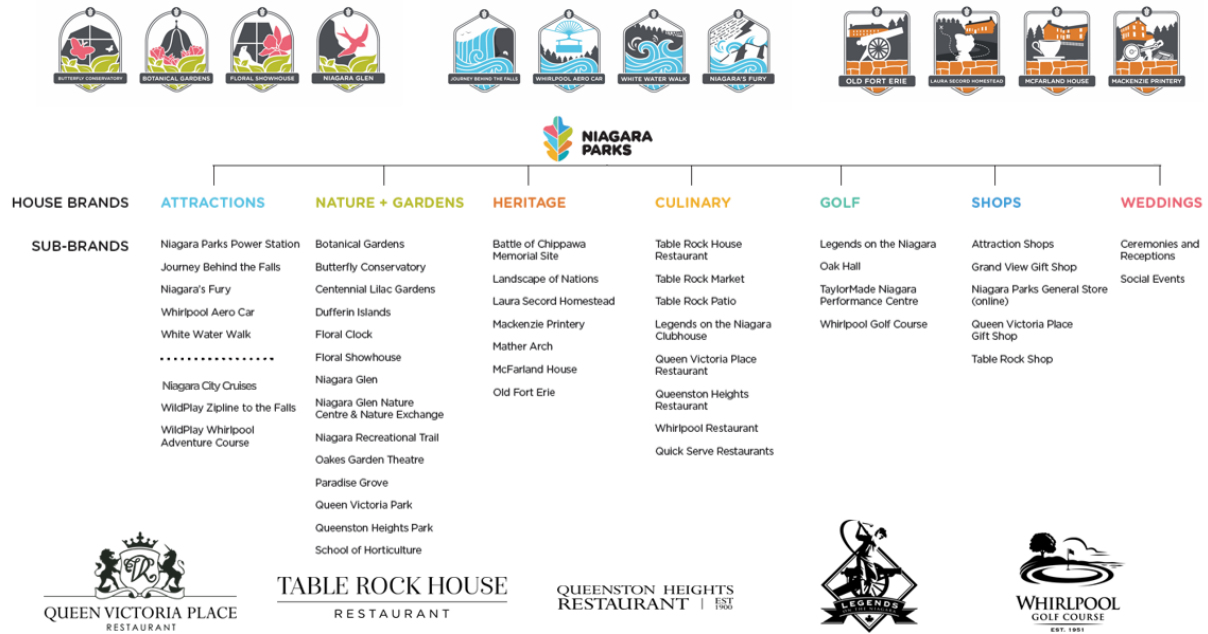
Since its inception in 1885, Niagara Parks has operated under a balanced mandate of preserving and promoting the environmental and cultural heritage of the Niagara River corridor, while remaining financially self-sufficient. Niagara Parks fulfills this self-funding principle by generating revenue from its attractions, restaurants, heritage sites, retail stores and golf courses to fund its operations and investments into environmental and cultural stewardship initiatives.

Niagara Parks is a board-governed operational enterprise agency of the Government of Ontario. The Niagara Parks Board of Commissioners is composed of up to twelve public appointees who are responsible for making policy decisions, providing guidance to staff and reporting to the provincial government. The members of the Commission are appointed by the Province and are responsible and accountable to the Government of Ontario, the sole shareholder of the Commission. There are four municipal appointees, representing the Regional Municipality of Niagara and the three bordering municipalities, the Town of Fort Erie, the City of Niagara Falls, and the Town of Niagara-on-the-Lake. Public appointees are members of the public who participate on the boards of provincial agencies and other public organizations.

Niagara Parks' corporate structure consists of a variety of departments that support its stewardship responsibilities, along with the revenue-generating operations that fund the organization. Niagara Parks has an Executive Team that is responsible for all departments within the organization. Niagara Parks' CEO reports to the Chair of the Niagara Parks Board of Commissioners

Niagara Parks has a diverse workforce made up of both front-line employees that manage the organization's front-facing guest experiences (see Table 2 below for brand umbrella), as well as employees that make up the organization's internal departments. At its peak, during the months of May to August, Niagara Parks employs a workforce of approximately 1,300 employees, split between full-time, seasonal, part-time and student employees.

Table 2 – Niagara Parks Brand Umbrella showing both paid and unpaid services provided to the public



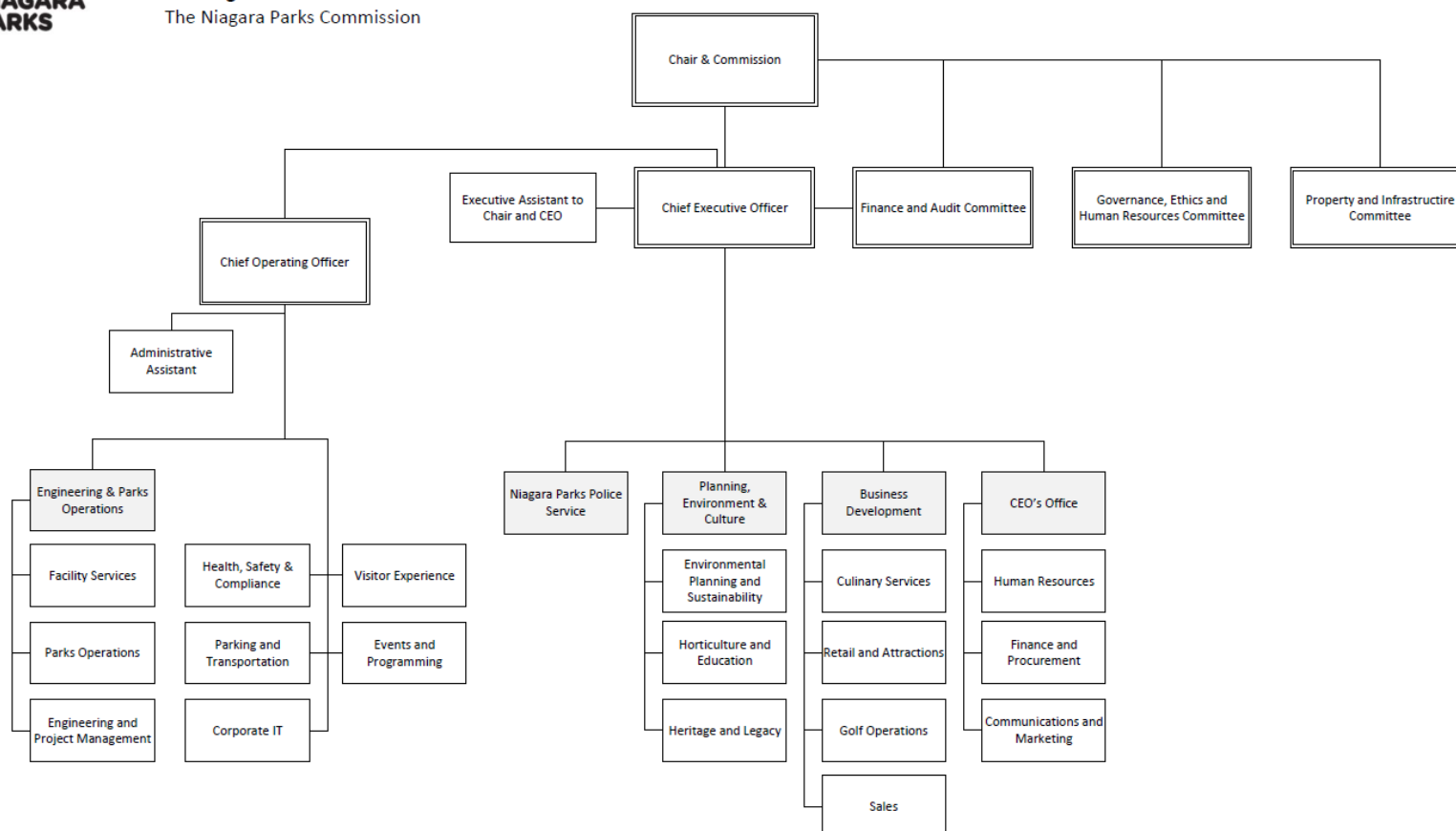
Corporate Structure

The revenues generated from Niagara Parks' consumer-facing products and experiences fund the organization's entire operations, including its environmental and cultural stewardship work. Niagara Parks' corporate structure is comprised of departments that report to the Chief Executive Officer and the Chief Operating Officer. Each department has an operating budget that includes staffing and operational requirements, as well as budgeting for new programs and initiatives to be undertaken to advance the strategic goals of the Commission. Niagara Parks' organizational chart is shown in table 3 below.

Table 3 – Niagara Parks Organizational Chart 2023



Organizational Chart
The Niagara Parks Commission





Engineering and Parks Operations

Facility Services; Parks Operations; Engineering and Project Management; Health, Safety & Compliance; Parking and Transportation; Corporate IT; Visitor Experience; Events and Programming

The Engineering and Parks Operations unit focuses on the day-to-day operations and management of Niagara Parks' lands, facilities and systems. In addition to year-round maintenance of the 56-kilometre Niagara Parkway and 53-kilometre Niagara River Recreation Trail, Niagara Parks is responsible for an estimated \$360 million in depreciable assets. Each year, Niagara Parks implements a capital budget that includes resources for deferred maintenance and investments in its assets to support its revenue-producing capabilities. These investments also support Niagara Parks' ability to provide exceptional guest experiences at all of its locations, from paid experiences to its spectacular natural spaces. Niagara Parks has established a multi-year capital planning process that informs its capital budget based on a ranking system to identify critical, safety, asset integrity and strategic projects, measured against available funds.

Niagara Parks' deferred maintenance includes the following categories:

- Roads, Bridges, Paths, Sidewalks
- Facilities
- Equipment
- Fleet & WEGO Buses
- Information Technology

Over the course of 2024-27, staff in the areas of Facility Services, Engineering and Project Management and Parks Operations will be responsible for the implementation of the projects outlined in the capital budget (deferred maintenance and strategic projects), whether through skilled labour or from a project management standpoint.

In addition to the strategic projects outlined in the Implementation Plan, Niagara Parks' Engineering and Parks Operations teams will be responsible for the execution of \$32.7 million worth of deferred maintenance capital projects throughout 2024-25, including:

- Substantial road repaving work across Niagara Parks
- Significant parking lot resurfacing
- Improvements to trails, sidewalks and pedestrian bridge replacements
- Roof replacement at Oak Hall
- Resurfacing of Thompson Point Viewing Platform
- Electrical infrastructure and HVAC across the Park
- Critical equipment replacement across the park
- Installation of new digital menu boards and self-serve kiosks at certain locations



Health, Safety & Compliance

The Health, Safety & Compliance team will focus on the following priorities for 2024-27:

- Risk assessment and control programs using an enterprise-wide approach
- Updating in-person health and safety training
- Maintaining the business continuity planning program
- Continuing to manage and track the organizational compliance inspection schedule
- Developing ergonomic programs to prevent sprain and strains
- Improving the Hearing Protection Program
- Updating the Contractor Safety Training program
- Focusing on emergency prevention and emergency management
- Continuing to track continuous improvement opportunities within the health, safety and compliance department and other applicable departments.

Parking and Transportation

Niagara Parks offers a variety of paid and free parking facilities across its properties, as well as the Green Line of the WEGO Bus Service (partnership with the City of Niagara Falls), the Niagara-on-the-Lake WEGO shuttle service and the Falls Incline Railway. Through its WEGO Bus Service, Niagara Parks has also taken over transportation of guests traveling into Niagara Falls with GO Transit, to provide connection from the train station to Table Rock Centre. For 2024-27, with the current WEGO bus agreement set to expire in August 2024, Niagara Parks will explore additional opportunities to better integrate the WEGO Bus Service across its properties and the destination, including the potential of adding more capacity to support the service.

Corporate IT

Niagara Parks' Information and Technology and Electronic Service Delivery Plan is included in section 13.

Visitor Experience

The Visitor Experience team will continue to support several numerous integral functions including ticketing, guest satisfaction and data collection, product development and third-party channel sales in support of the strategic goal of developing great guest experiences at Niagara Parks. For 2024-2027, processes will continue to be evolved to address the changing demands and expectations of guests, including the simplification of the purchase process both in-person and online, as well as offering increased value through bundled attraction packages.

Events and Programming

Niagara Parks hosts events and programming throughout the year on its properties, from its own dedicated programming to largescale third-party events. Niagara Parks' events and programming represent a key component of its tourism mandate, intended to increase visitation to Niagara Parks and the Niagara region. Niagara Parks' corporate theme for 2024-25 is resilience and renewal. For



2024-27, Niagara Parks will be seeking partnership with a number of brand-aligned third-party organizations to host select signature events at its properties rather than several smaller in-house events, including the Niagara Grape & Wine Festival, the TD Jazz Festival, FeverUP productions and more. This approach allows for better resource allocation and cost-sharing opportunities while still ensuring an excellent guest experience in the Park.

In 2024, Niagara Parks will be hosting multiple days of programming and events to align with the Solar Eclipse on April 8, 2024. Niagara Falls and especially Fort Erie will be a prime location to experience the eclipse based on the path of totality. Also in 2024-25, Niagara Parks will continue to host the Falls Fireworks program, which is another major contributor to tourism to the area. Additional investments into Niagara Parks' Winter Festival of Lights installations and activities, led by Niagara Parks' Events and Programming team, will help drive visitation during the shoulder seasons.

Planning, Environment and Culture

Environmental Planning and Sustainability; Heritage and Legacy; Horticulture and Education

The Planning, Environment and Culture unit oversees Niagara Parks' environmental and cultural stewardship work, including the operation of Niagara Parks' heritage and nature and gardens sites.

Environmental Planning and Sustainability

In addition to Niagara Parks' standard operations to maintain the lands across the Niagara River corridor, from cutting the grass to planting the flowers, Niagara Parks also undertakes additional environmental stewardship work to preserve and protect the environmental sustainability of its lands. This work falls under three areas of focus: Forest Canopy Sustainability, Preserving Species Diversity and Shoreline Management. The following information outlines Niagara Parks' environmental stewardship priorities for 2024-2027:

- **Forest Canopy Sustainability**

Niagara Parks will continue to plant a minimum of 5,000 trees annually across the Park to expand the forest canopy coverage to 35%. This will include annual Community Volunteer Tree Planting Events. In addition to the 5,000 annual tree planting target, Niagara Parks will offset the loss of any existing trees (due to storm damage, mortality, etc.) by replanting at up to a 4:1 replacement ratio depending on the tree size. An inventory of potential planting areas over the next five years will be developed and prioritized. Niagara Parks will also be moving ahead with a tree inventory to monitor ongoing tree health over time across the park. To increase planting success, Niagara Parks will be engaging with the Vineland Research and Innovation Centre to analyze soil conditions and provide recommendations for soil improvements, prior to planting. In collaboration with Niagara College's Ecosystem Restoration Program, land management plans are being developed, starting with Niagara Parks' Chinguapin Oak Savannah habitat located adjacent to the Niagara Parks Botanical Gardens.

- **Preserving Species Diversity**



To increase biodiversity, Niagara Parks will continue use the 5-10-20 rule when selecting trees, ensuring that no more than 5% of the same species, 10% of the same genus, and 20% of the same family are planted in a given area. Niagara Parks will also implement its new Invasive Species Management Program, which focuses on the prioritization, management and monitoring of 10 existing and threatening invasive species. This program will also engage citizen scientists to inventory invasive species across Niagara Parks. A pilot program to manage invasive Phragmites utilizing goats will also be trialed at the Gonder's Flats wetland site. This will also aid in the protection of nearby species at risk, such as Swamp Rose Mallow. Niagara Parks will also continue to work directly with the Canadian Food Inspection Agency and the Ontario Ministry of Agriculture to monitor for the presence of emerging invasive species threats such as Oak Wilt and Spotted Lanternfly.

To support habitat diversity, Niagara Parks will continue to build capacity within its grassland management and prescribed burn team. Prescribed burns are essential for the maintenance of NPC's twelve grassland habitat sites. Native grasslands, such as tallgrass prairie are critical habitat for grassland dependent bird species such as Bobolink and Eastern Meadowlark. Through Niagara Parks' management actions over the past five years at the Chippawa Battlefield grassland, both of these species have returned. At least five grassland sites will be burned annually. Niagara Parks will also develop a viewing platform at the Chippawa Battlefield Grassland to support interpretation of both natural and cultural heritage at this national historic site.

- Shoreline Management

To achieve its target of having 75% of the shoreline covered in native vegetation, Niagara Parks will remove invasive species and replant with native vegetation on up to 8km of shoreline each year. Niagara Parks will also be piloting no-mow zones along the shoreline to ensure there is a minimum of a 5-metre vegetated shoreline buffer. Shoreline buffers are necessary to prevent shoreline erosion, provide wildlife habitat, and improve water quality.

Building on the success of the Gonder's Flats wetland restoration project, Niagara Parks will continue to invest in amenities to support educational and interpretive opportunities and programs. This will include the installation of interpretive signage and hosting of student groups to explore wetland diversity. Additional plantings of terrestrial and aquatic vegetation will occur to increase biodiversity.

With financial support from TD Canada Bank, Niagara Parks is undertaking numerous shoreline erosion mitigation projects within Dufferin Islands in 2024 and 2025. In addition to utilizing bio-engineering techniques to stabilize eroding shorelines, existing weir and dam infrastructure will be evaluated and replaced as needed to protect downstream species at risk. This project will also enhance accessibility and educational opportunities throughout this naturalized urban park.

The shoreline along the Niagara River, stretching 2 kilometres between Old Fort Erie and the Peace Bridge, has been significantly impacted by extreme weather events over the past ten years. To improve the resiliency of the shoreline and adjacent parklands, Niagara Parks is engaging with a coastal engineer to develop an alternative shoreline protection strategy which will also support aquatic fish habitat. Based upon this alternative design, phased implementation of new shoreline protections will occur.



Heritage and Legacy

Niagara Parks' stewardship mandate extends beyond the physical preservation of its environmental features to include the preservation of the cultural heritage features and stories of this area. Niagara Parks owns and operates four paid, revenue-producing heritage sites: Old Fort Erie, Laura Secord Homestead, Mackenzie Printery and McFarland House. Beyond these paid experiences, Niagara Parks is also home to hundreds of heritage plaques and markers, signifying the numerous historical events that have taken place throughout the Niagara River corridor and particularly related to the War of 1812.

Themes of the Explore the Niagara collaborative initiative that was established with the Town of Fort Erie, Town of Niagara-on-the-Lake, City of Niagara Falls and Parks Canada, to highlight sites and activities throughout the Niagara River corridor, will continue to guide the priorities and planning for the Heritage and Legacy team for 2024-27:

- Black History

Throughout 2024-27, Niagara Parks will continue to promote its Black history route that connects Niagara Parks sites to various events and people significant to Black history in Canada. In 2024-25, Niagara Parks will explore collaborative opportunities and events with the TD Jazz Festival.

- Indigenous Culture

In 2023-24, Niagara Parks introduced new curated group tour offerings to help share the fascinating history and culture of Niagara through Niagara Parks sites and experiences. These tours were designed to invite guests to dive deeper into their understanding and appreciation for the lands along the Niagara River while providing a unique and authentic experience. The Indigenous Niagara Heritage and Legacy Tour offers interactions with Indigenous guides and experts at the Landscape of Nations memorial, as well as a guided tour of the Niagara Parks Power Station and Tunnel, followed by an Indigenous-themed lunch at Table Rock House Restaurant. For 2024-25, Niagara Parks will build on this tour and develop a bus tour specific to its north parkway properties.

Throughout 2024-27, Niagara Parks will continue to host events and programming in honour of National Indigenous History Month in June, National Day for Truth and Reconciliation in September and for Indigenous Veterans Day with its Valour and Victory ceremony in November.

- Nation Building

In 2024-25, Niagara Parks will refresh the storytelling opportunities and themes at its north parkway heritage properties (Laura Secord Homestead, Mackenzie Printery and McFarland House) to focus on famous individuals. Following stage three archaeology work at Niagara Parks' oldest property, McFarland House, there are opportunities to explore new interpretation to share the archaeological findings, which include 962 structural artifacts, 54 personal artifacts and 1,687 dishware artifacts.

- Nature

Throughout 2024-26, Niagara Parks' PEC staff will be leading the development of a new exhibit at the Butterfly Conservatory. Niagara Parks will be working with Science North to develop the all-ages



exhibit that will tell the story of Niagara Parks' environmental stewardship and add value to the experience of guests visiting the Niagara Parks Butterfly Conservatory. Exhibit development will take place throughout 2024-25 with a planned opening in the winter/early spring of 2026.

- Active Living

In 2024-25, Niagara Parks will support the launch of a new audio tour at the Niagara Glen that was developed by Indigenous community member Michele-Elise Burnett and audio-engineered by Indigenous community member William Reich, with support of the Niagara Parks Foundation. The audio tour will be a self-guided experience within the renowned hiking trails of the Niagara Glen, Niagara Parks' pristine pocket of Carolinian forest within the Niagara Gorge overlooking the Niagara River. The tour includes Indigenous teachings and music connected to various sites within the Niagara Glen.

Horticulture and Education

Over the course of 2024-27, Niagara Parks will be adding to its Life on Display installation at the Floral Showhouse to develop a new unique summer activation at the site with potential to integrate with the design for the new skating loop. Niagara Parks will also be supporting the development of a Recognition Garden at the Botanical Gardens in collaboration with the School of Horticulture Alumni Foundation. A new Indigenous Plant Tour will educate the public about Indigenous peoples' use of and traditions connected to Indigenous plants. The tour will also be an opportunity to showcase signature installations across the Park. Niagara Parks will also be improving its garden sites and exploring opportunities for increased guest engagement at the Centennial Lilac Garden and the gardens at its heritage property McFarland House.

Business Development

Retail and Attractions; Culinary Services; Golf Operations; Sales

The Business Development unit consists of teams that manage and support Niagara Parks' revenue-generating operations. Under the broader brand and identity of Niagara Parks, there are a number of house brands that encompass the organization's consumer-facing experiences and revenue-producing operations. Niagara Parks' revenue-generating operations provide funding for the organization, including its environmental and cultural stewardship work. Large-scale investments to Niagara Parks' revenue-producing operations are captured in Niagara Parks' capital budget; however, the following information outlines key operational projects and priorities the business units will be undertaking for their areas over the course of 2024-27.

Retail and Attractions

Attractions: Journey Behind the Falls, Niagara Parks Power Station + Tunnel, Butterfly Conservatory, Niagara's Fury, Whirlpool Aero Car, White Water Walk, Floral Showhouse

Retail: Attraction Shops, Table Rock Shop, Queen Victoria Place Gift Shop, Grand View Gift Shop



Based on favourable visitation patterns and guest feedback collected through digital surveys, Niagara Parks will be extending the hours of operations at certain attractions for the 2024-25 tourism season beginning at its top revenue-producing attraction, Journey Behind the Falls.

Niagara Parks' retail stores will continue to source and provide high-quality merchandise that aligns with Niagara Parks' brand and mandate. There will be a newly renovated retail store to support the new Flying Theatre attraction on the upper level of Table Rock. Niagara Parks will also be establishing more of a presence at its Fallsview Casino Retail Store and Welcome Centre with an expanded footprint, adding more retail merchandise to provide a better shopping experience for guests at that location.

Culinary Services

Full-serve restaurants: Table Rock House Restaurant, Queen Victoria Place Restaurant, Legends on the Niagara Clubhouse, McFarland House Tea Room, Whirlpool Pub

Quick-serve restaurants: Table Rock Market, Queen Victoria Place Café, Grand View Quick Serve, Whirlpool Aero Car Snack Bar, Garden Café

In addition to the management of all of Niagara Parks' full-serve restaurants and quick-serve culinary outlets, as well as culinary support for special events, Niagara Parks Culinary team will focus on opening Niagara Parks' next culinary venue, Table Rock Bistro, as well as exploring the potential of installing kiosks at its quick serve outlets to address some of the challenges due to labour shortages in the hospitality sector that have particularly impacted the culinary team. Niagara Parks Culinary will also support the opening of the refreshed Whirlpool Pub at its Whirlpool Golf Course.

Golf Operations

Golf Courses: Legends on the Niagara, Whirlpool Golf Courses

In 2024-25, Niagara Parks will be reopening its Whirlpool Restaurant for the first time since closing during the pandemic. Niagara Parks will be completing modest renovations and will reopen the restaurant with a refreshed and casual look as the Whirlpool Pub, including lounge-style seating, TVs, and a new menu. Also at Whirlpool Golf Course, work will begin to restore course conditions that are better aligned with the original Stanley Thompson design for the course, as established in 1951, addressing impacts to course conditions that have resulted over the years.

Sales

Weddings, Business Events, Travel Trade (domestic & international)

Niagara Parks' Sales Team is responsible for the weddings market, in addition to business events and travel trade (domestic and international) bookings. Niagara Parks offers a number of wedding ceremony and reception venues and Business and Social Event venues, including its full-service restaurants, garden locations and the most recently added, Niagara Parks Power Station and Tunnel. Wedding receptions and business/social events are a high-value market for Niagara Parks and an important contribution to the culinary and attractions departments, especially with corporate buyouts of the new Niagara Parks Power Station and Tunnel. The Sales Team will continue to target



the key markets of Toronto for corporations and provincial associations, as well as Ottawa for Canadian associations for business events that deliver shoulder season business, in addition to the local/regional market.

For travel trade, the domestic market continues to place a focus on sales missions and hosting familiarization tours to generate new account development that deliver high volume and year-round business. Internationally, Niagara Parks' Sales Team will continue to work closely with Destination Ontario and Destination Canada to leverage their sales missions and familiarization tour activities, working with in-market representatives to assist with pursuing international markets. The target international travel trade markets being targeted include UK, Mexico, Germany, France, South Korea and Japan.

CEO's Office

Human Resources; Finance and Procurement; Communications and Marketing

Human Resources

A comprehensive breakdown of Niagara Parks' Human Resources priorities are included in section 12.

Finance and Procurement

The Finance and Procurement departments has been working with the recently implemented ERP system, Unit 4 to streamline and improve business processes. Through this system, Finance and Procurement has been able to improve operational efficiencies across the organization, improve internal controls through the creation of robust workflow controls along with providing enhanced reporting to end users. The focus moving into 2024/25 will be to expand the use of the ERP to further automate processes, improve controls and increase operational efficiencies. A significant focus will be placed on asset management and capital planning.

Communications and Marketing

Niagara Parks' Communications and Marketing team includes in-house content creators, digital marketing and communications coordinators and graphic designers who produce all of Niagara Parks' internal and external communications and marketing products. In addition to the priorities, goals and tactics set out in the Communications and Marketing Plan section of this Business Plan, a key project for the Communications and Marketing team throughout 2024-27 is the development of a new consumer website.

Third-Party Tenant Agreements

Niagara Parks has third-party tenant agreements with Niagara City Cruises who operate the Boat Tour and Niagara Adventure Excursions who operate the Zipline to the Falls and the Whirlpool Adventure Course. The tenant agreements are a revenue-generating opportunity for Niagara Parks that include a rental payment structure for the lease of Niagara Parks' land in addition to a percentage of overall revenues generated by the attractions. Niagara Parks also has a third-party



agreement with Digital Attractions for photo capture services at Journey Behind the Falls, Niagara City Cruises, White Water Walk and the Butterfly Conservatory.

Niagara Parks Police Service

The Niagara Parks Police Service (NPPS) was established by the Niagara Parks Commission in 1887 to provide specialized policing services dedicated to protect the parks and the millions of visitors who travel to Niagara Falls annually. NPPS members are employed by Niagara Parks and appointed as Special Constables by the Regional Municipality of Niagara Police Services Board and approved by the Solicitor General of Ontario.

Over the course of 2024-27, Niagara Parks will be increasing investments to the Niagara Parks Police Service to ensure the safety and security of its properties, guests and staff including the hiring of more provincial offences officers. Additional investments include specialized uniforms and protective equipment, resources to support the establishment of the new 911 system (with support from the Solicitor General of Ontario), and additional protective barriers to enhance pedestrian safety.

Niagara Parks School of Horticulture

Since 1936, Niagara Parks has operated the Niagara Parks School of Horticulture that provides students with a three-year professional horticulture diploma that is highly regarded within the horticulture industry. The Niagara Parks School of Horticulture is housed on the grounds of the Niagara Parks Botanical Gardens, which act as a living classroom for students of the program who are responsible for maintaining the grounds as part of their apprenticeship training. In addition to hands-on learning, the program also provides students with academic course study in areas such as business management, landscape design, computer-assisted design, plant identification, commercial greenhouse production, plant pathology and more.

Niagara Parks also owns and operates a student residence on the grounds of the Botanical Gardens, including dormitory-style living with double and single-room options and an on-site culinary team.

The Niagara Parks School of Horticulture has been growing the last number of years and welcomed the largest class of students in its history in September 2023.

Niagara Parks Foundation

The Niagara Parks Foundation is a board-governed registered charity that was officially relaunched in 2022 to provide additional funding and support to advance the environmental and cultural stewardship work of Niagara Parks and to allow corporations and individuals to directly contribute to preserving one of the world's most spectacular public parkland systems. The Niagara Parks Foundation collaborated with the Niagara Parks Commission to determine a number of environmental and cultural stewardship projects that would be priority projects for the Foundation moving forward. The priority projects that the Foundation will be focusing on throughout 2024-27 include:



- Tree planting
- Indigenous Programming & Nature Tours
- Preservation and interpretation of the original 1764 Fort at Old Fort Erie
- Family Discovery Garden
- Recreation Trail Redevelopment
- Children's Programming

In 2023, the Niagara Parks Foundation engaged a fundraising consultant to develop a fundraising plan. The fundraising plan will be implemented throughout 2024-27 and guide the work toward achieving the priority projects.

7.0 Realty and Property Portfolio

Niagara Parks' property portfolio extends the length of the Niagara River from Fort Erie to Niagara-on-the-Lake. Niagara Parks has a Realty Policy that aligns with the Management Board of Cabinet's Realty Directive (2015) that governs the management, acquisition and disposition of realty undertaken by the Niagara Parks Commission. Niagara Parks' Medium-Term Recovery Plan submitted to the Ministry in March 2021, outlined a key opportunity for cost-savings by identifying non-core land and building assets for sale and/or lease. The management of Niagara Parks' lands is also specifically outlined in the Ministry's Letter of Direction for Niagara Parks to work with the Ministry to seek approvals as necessary.

Niagara Parks updated its Realty Policy to reflect opportunities for revenue generation through disposal of surplus lands and optimization of lands to improve operational efficiencies. As guided by its Medium-Term Recovery Plan and updated Realty Policy, Niagara Parks will continue to work with the Ministry on land transaction matters and seek appropriate approvals as required.

Throughout 2024-27, Niagara Parks will continue to work closely with the Ministry seeking approvals as required to implement the following land transactions:

- Development of land lease agreements for the redevelopment of Toronto Power and Ontario Power Generating Stations
- Surplus realty vacant land sale (Niagara Falls – E/S and W/S Ives Gateway)

The Regional Municipality of Niagara has approved acquiring both parcels for a water treatment facility.

- Surplus Realty Vacant Land Sale (Fort Erie – W/S Thompson Road)

Proposed sale of vacant property as 3-4 residential lots.

- Residential Land Sale

Private land sale matter to be negotiated.

8.0 Environmental Scan

Since the pandemic, the 2023-24 tourism season brought Niagara Parks the closest to returning to 2019-20 levels of visitation, including a significant increase to visitation and tourism spending from the critical US market. Niagara Parks also saw lifts in visitation from other key international markets including the UK, France and Germany, as well as Mexico. As anticipated, the Asian international market will be slower to return. Coming out of the pandemic, Niagara Parks has been able to position its newest attraction, the Niagara Parks Power Station and Tunnel, as well as key investments in its most popular sites, including Table Rock Centre and particularly Journey Behind the Falls, to drive new and repeat visitation. These investments have contributed to Niagara Parks' ability to differentiate itself within the tourism landscape to attract both domestic and international travellers, as well as significant media interest.

Tourism Landscape

In 2023, Canada's tourism industry was characterized by resilience, recovery and adaptation as markets emerged from the challenges and repercussions resulting from the COVID-19 pandemic. From the resurgence of domestic leisure travel to the gradual return of international visitation, 2023 was a year that showcased Niagara Parks' enduring allure and adaptability in the face of global challenges.

While Niagara Parks' American visitation accelerated in 2023 and spending outpaced 2019 figures at certain points throughout the year, visitation levels remained below pre-pandemic levels by year's end. This trend mirrors projections from Destination Canada, which suggests that tourism spending from the US will exceed 2019 in 2023, followed by visitation numbers in 2024¹.

In the first quarter of 2023, Canada's tourism spend rose to 86.7% of its level in the fourth quarter of 2019, before the COVID-19 pandemic.² This performance was led by domestic tourism spending, which reached 109% of 2019 levels.³ Data from Statistics Canada indicates that domestic tourism spending increased 3.5% in the first quarter of 2023, following a 1.3% decline in the previous quarter.

¹ Tourism Outlook – Fall 2023, Destination Canada [Tourism Outlook - Fall 2023 \(destinationcanada.com\)](https://www.destinationcanada.com/tourism-outlook-fall-2023)

² National tourism indicators, first quarter 2023, Statistics Canada <https://www150.statcan.gc.ca/n1/daily-quotidien/230629/dq230629b-eng.htm>

³ Quarterly Tourism Snapshot, Q1 2023, Destination Canada https://www.destinationcanada.com/sites/default/files/archive/1840-Quarterly%20Tourism%20Snapshot%20-%20Q1%202023/DC_Quarterly%20Tourism%20Snapshot_Q1%202023_EN.pdf



While domestic tourism led revenue the recovery coming out of the pandemic, international tourism is predicted to outpace that growth trajectory. Destination Canada is predicting that its top three European markets (UK, France and Germany) will reach 98% of their 2019 tourism spending levels and surpass that figure in 2024 to reach 105% or \$3.4 billion. Actual visitation numbers (vs revenues) are predicted to exceed pre-pandemic levels by 2025

Due to economic and geopolitical tensions, the Asian market is on a slower trajectory for returning to pre-pandemic levels, with spending from Japanese and South Korean travellers predicted to recover in 2025, followed by visitation numbers in 2026. Visitation from China is predicted to recover in 2027.

Tourism spending in Canada is outpacing the growth of the overall economy; however, Canada's tourism industry will not grow as quickly as tourism worldwide. Canadian tourism spending is projected to increase by 5.8% from 2024 to 2030, whereas tourism spending across the globe is projected to grow at a compound annual rate of 7.1%, illustrating the fiercely competitive tourism market that has shaped the industry post-pandemic⁴.

Employment in tourism remains a challenge. Many jobs remained unfilled (6.8%) at the end of the first quarter of 2023, and the unemployment rate (6.0%) remained higher than the Canadian economy's average (5.4%).⁵ Niagara Parks has been particularly impacted by shifts in the labour market. In response, its Human Resources team established the Talent Acquisition and Retention Plan and Committee (TARC), comprised of both Human Resources staff and front-line management, focused on diversifying and creating need talent pipelines to ensure adequate staffing to maintain service levels across the organization.

In 2024, domestic tourism is projected to remain strong, with Canadians continuing to explore their own country. The rise of regional travel and the demand for authentic local experiences is likely to persist. In addition, international tourism is poised to rebound as confidence to travel among international markets continues to rise, with Niagara Falls remaining an attractive destination for travellers from around the world.

Visitation Patterns

While international travel is gradually regaining momentum, domestic tourism was a strong driver at Niagara Parks in 2023. The seasonal fluctuations at Niagara Parks were consistent with previous years, with peak visitation occurring during the summer months.

Visitors from regional domestic markets, specifically the Greater Toronto Area, comprised the bulk of visitation at Niagara Parks. International visitation showed signs of recovery as well, marking an

⁴ Tourism Outlook – Fall 2023, Destination Canada

⁵ Quarterly Tourism Snapshot, Q1 2023, Destination Canada



encouraging return, primarily from the United States. In 2023, Niagara Parks transaction statistics indicate customers were visiting from 171 different countries, with five countries representing 84% of its total non-domestic revenues: the United States, United Kingdom, Mexico, Germany and France.

While tourism spending in Canada increased overall, customer spending at Niagara Parks showed a decrease in average transaction size in areas such as entertainment, food and retail, with customers looking for greater value for their purchases. This shift in consumer behaviour may be explained by rapid inflation and changes in exchange rates dissuading international travellers from spending as much during their visits. Domestic visitors may also have curtailed their expenditures due to economic uncertainties.

Since the pandemic, leisure travel has been the main driver for the tourism industry; however, business travel is now picking up, with spending predicted to return to 102% of 2019 levels in 2024, though still behind leisure spending. Additionally, while business travel leads are improving, actual bookings are not predicted to recover until 2028⁶.

Economic Climate

In 2023, Canada's economic climate was marked by inflationary pressures, with rising prices affecting various sectors, including housing, tourism and consumer goods.

As outlined in the Government of Canada's Fall Economic Statement released on November 21, 2023, the Canadian economy is expected to avoid a recession and instead see subdued growth over the next few quarters. While higher interest rates and weakened global economic activity have resulted in a slower economic growth in Canada, an eventual return to stronger growth is expected in 2024.⁷

In its Economic Outlook, Deloitte outlines that it expects the Bank of Canada to end its tightening campaign and even begin reversing some of its recent hikes in the spring of 2024. It predicts economic growth will resume at the beginning of 2024, with Ontario's economy growing by an estimated 0.9% in 2024.⁸

Unlike the Canadian economy, the American economy was a standout in terms of resilience in 2023. TD Economics highlights that it is set to see growth slow from 2.3% in 2023 to 1.3% in 2024.

⁶ Tourism Outlook – Fall 2023, Destination Canada

⁷ 2023 Fall Economic Statement, Government of Canada <https://www.budget.canada.ca/fes-eea/2023/report-rapport/overview-apercu-en.html#a5>

⁸ Economic Outlook, September 2023, Deloitte <https://www2.deloitte.com/ca/en/pages/finance/articles/economic-outlook.html>

9.0 Financial Budget

As Niagara Parks enters the 2024-2027 business planning cycle, the organization concludes a better-than-anticipated tourism season in 2023-24. For the year ending March 31, 2024, Niagara Parks is projecting a \$48 million surplus and a net surplus of \$31 million when factoring in depreciation and interest, an increase of 74% when compared to the previous year. Contributing to this success is a projected \$123.3 million in earned revenue from its revenue-producing operations, which include attractions, retail stores, parking sites, WEGO bus service, Falls Incline Railway, culinary outlets and golf, amounting to \$158.3 million in revenue from all sources. This contribution is \$36.3 million higher than what was budgeted for 2023-24 and \$40.4 million higher than revenues achieved in 2022-23.

This success is contributed in part to favourable weather conditions which allowed for an earlier than normal start to the season, as well as returning levels of visitation from key markets such as the US. Niagara Parks' communications and marketing efforts effectively positioned Niagara Parks' attractions and pass products, including several impactful media buys in Canada and the US throughout the peak tourism season that produced excellent results in driving visitation to Niagara Parks' online sales funnel. This culminated in Niagara Parks' best week on record for online sales from July 31 – August 6, 2023, generating \$799,000. The previous record was \$710,000 set in July of 2022.

The favourable results produced throughout the 2023-24 season have allowed the organization to prioritize investments in its deferred maintenance, which grew significantly during the COVID-19 pandemic as a result of conserving finances and addressing only the most critical repairs. Niagara Parks has an estimated \$360 million in depreciable assets and a list of an estimated \$200 million in deferred maintenance projects. For 2024-25, Niagara Parks will be implementing a capital budget of \$69 million, including \$32.7 million toward deferred maintenance and \$36.3 million for strategic investments designed to enhance the experience of guests at all Niagara Parks sites and grow tourism.

For 2024-25 Niagara Parks will be implementing an operating budget of \$120 million which includes budgets for each department that covers payroll, operating expenses, as well as key operational projects to be undertaken in the fiscal year ahead.

Operating Budget

Niagara Parks prepares an annual operating budget that allocates funds to cover the operating expenses of its business units and sites, based on projected targets for its revenue-producing operations and all other revenues generated for the organization. The projected budget for revenue-producing operations is informed by a variety of factors including tourism trends, economic climate, predicted operational season, revenue losses due the closure of Niagara's Fury (\$1.4 million) and new revenues from the Fallsview Casino Retail Store and Welcome Centre, the Table Rock Bistro and the Whirlpool Aero Car snack bar.

Based on the favourable results of 2023-24, as well as feedback collected from guest surveys, the 2024-25 operating budget reflects increased service levels across the organization, including resources for more staffing and additional systems to streamline processes. The staffing plan and associated costs align with anticipated visitation and revenue levels, as well as operational hours. The operating budget is also developed based on the following economic assumptions: expected 3% CPI increase will drive costs higher, 5% increase to utility costs and 1.75/2.5% economic increase due to labour costs. Table 4 shows a breakdown of Niagara Parks' operating budget for the next three years including projected revenue and total expenses. The Overview of Current and Future Programs and Activities section of this Business Plan provides a further illustration of the business units, revenue-generating operations and other revenue sources captured in Niagara Parks' operating budget.

Table 4 – Niagara Parks 2023-27 Statement of Operations

Statement of Operations By Business Unit

In thousands of dollars	F 2022/23 ACT	F 2023/24 ACT/FCT	GROWTH (%) to Prior Period		
			4%	4%	3%
	F 2022/23 ACT	F 2023/24 ACT/FCT	F 2024/25 BUDGET	F 2025/26 BUDGET	F 2026/27 BUDGET
Revenue Producing Operations					
Retail	\$ 20,910	\$ 30,216	\$ 30,463	\$ 31,681	\$ 32,631
Attractions	\$ 27,943	\$ 37,644	\$ 38,636	\$ 40,568	\$ 41,785
Parking & Transportation	\$ 15,932	\$ 23,216	\$ 24,468	\$ 25,691	\$ 26,205
Culinary	\$ 17,531	\$ 25,065	\$ 27,013	\$ 27,823	\$ 28,658
Golf Operations	\$ 6,647	\$ 7,172	\$ 7,387	\$ 7,387	\$ 7,387
Total Revenue Producing	\$ 88,963	\$ 123,312	\$ 127,966	\$ 133,150	\$ 136,666
Land Rent	\$ 8,335	\$ 8,707	\$ 9,037	\$ 9,489	\$ 9,774
Boat Tour Revenue	\$ 14,006	\$ 17,834	\$ 17,256	\$ 18,119	\$ 18,663
Zip Line Revenue	\$ 2,546	\$ 2,869	\$ 3,567	\$ 3,745	\$ 3,858
Photo Capture	\$ 1,324	\$ 1,873	\$ 1,809	\$ 1,864	\$ 1,910
All Other Revenue	\$ 1,809	\$ 1,418	\$ 1,629	\$ 1,710	\$ 1,719
Interest Income	\$ 855	\$ 2,245	\$ 1,000	\$ 1,000	\$ 1,000
TOTAL REVENUE	\$ 117,838	\$ 158,259	\$ 162,265	\$ 168,077	\$ 172,589
Operating Expenses					
Cost of Goods Sold	\$ 12,858	\$ 17,848	\$ 19,751	\$ 20,013	\$ 20,398
Operating Expenses - RPO	\$ 33,512	\$ 43,908	\$ 46,221	\$ 47,377	\$ 48,311
Strategic Plan	\$ 463	\$ 800	\$ 800	\$ 800	\$ 800
Parks, Environment & Culture	\$ 5,423	\$ 6,466	\$ 7,471	\$ 7,658	\$ 7,850
Engineering & Parks Operations	\$ 16,326	\$ 19,703	\$ 21,381	\$ 22,377	\$ 23,135
Police	\$ 4,041	\$ 4,373	\$ 4,930	\$ 5,053	\$ 5,180
Administration	\$ 6,347	\$ 7,346	\$ 8,618	\$ 8,761	\$ 8,980
Sales, Marketing & Visitor Experience	\$ 3,439	\$ 6,033	\$ 7,145	\$ 7,324	\$ 7,202
Insurance and Municipal Payments	\$ 3,386	\$ 3,605	\$ 3,859	\$ 3,897	\$ 4,053
TOTAL EXPENSES	\$ 85,795	\$ 110,082	\$ 120,177	\$ 123,260	\$ 125,909
EBID	\$ 32,043	\$ 48,177	\$ 42,087	\$ 44,818	\$ 46,680
All Other Expenses	\$ 14,315	\$ 17,260	\$ 18,745	\$ 20,865	\$ 22,651
Net Surplus/(Loss)	\$ 17,728	\$ 30,917	\$ 23,342	\$ 23,952	\$ 24,029
Capital Spending	\$ 6,523	\$ 22,000	\$ 69,000	\$ 50,000	\$ 46,000
Ending Cash Position	\$ 22,476	\$ 44,534	\$ 16,574	\$ 14,719	\$ 14,965



Capital Budget

Each year, Niagara Parks implements a capital budget that includes resources for deferred maintenance and investments in its assets to support its revenue-producing capabilities and Niagara Parks' ability to provide exceptional guest experiences at all of its locations, from its paid experiences to its spectacular natural spaces. Niagara Parks has established a multi-year capital planning process that informs its capital budget based on a ranking system to identify critical, safety, asset integrity and strategic projects, measured against available funds.

Prior to the pandemic, Niagara Parks generated over \$120 million in revenues, of which approximately 18% (\$22 million) was spent annually on lifecycle maintenance and enhancement of assets to support revenue-producing capabilities and visitor experience. During the pandemic when the organization was facing significant revenue losses and financial challenges, Niagara Parks deferred all but the most critical repairs in an effort to conserve its finances. This has led to a considerable backlog of deferred capital projects. As Niagara Parks has been able to recover from the pandemic, capital spending has been steadily increasing.

Resulting from a stronger year for tourism in 2023-24 wherein the organization expects to end the fiscal year having generated \$158.3 million in revenue, for 2024-2025, Niagara Parks has established a capital budget of \$69 million (44% of its annual earned revenue), with \$32.7 million allocated to its backlog of deferred maintenance and \$36.3 million toward strategic investment projects designed to enhance the guest experience at its sites. For 2025-26, Niagara Parks has proposed a capital budget of \$50 million with \$26.1 million allocated for deferred maintenance and \$23.9 million for strategic projects. For 2026-27, Niagara Parks has proposed a capital budget of \$46 million with \$26.7 million toward deferred maintenance and \$19.3 million toward strategic projects. A breakdown of the strategic capital projects to be undertaken by Niagara Parks for 2024-27 has been captured in the Implementation Plan section of this Business Plan. An overview of Niagara Parks' 10-year capital plan is captured in table 5 below.

Table 5 – Niagara Parks 10-year Capital Forecast, as of October 25, 2023

Niagara Parks Commission 10 YEAR CAPITAL FORECAST (THOUSANDS OF \$) - As at October 25 - 2023											
		1	2	3	4	5	6	7	8	9	10
	2023-24 Projection	2024-25 Projected	2025-26 Projected	2026-27 Projected	2027-28 Projected	2028-29 Projected	2029-30 Projected	2030-31 Projected	2031-32 Projected	2032-33 Projected	2033-34 Projected
Earnings before interest & Depreciation	\$ 46,500	42,000	49,000	45,532	47,868	49,304	50,783	52,307	54,399	56,575	58,838
Working Capital Changes (Increase Working Capital)		32,856	6,856	6,324	4,700	5,342	3,863	2,339	3,247	3,071	5,808
Repayment of Power Plant OFA		(2,646)	(2,646)	(2,646)	(2,646)	(2,646)	(2,646)	(2,646)	(2,646)	(2,646)	(2,646)
Principal & Interest on Debt Charges*	(3,210)	(3,210)	(3,210)	(3,210)	(2,922)						
Capital Funding Forecast	43,290	69,000	50,000	46,000	47,000	52,000	52,000	52,000	55,000	57,000	62,000
DEFERRED & PREVENTATIVE MAINTENANCE											
Facilities	5,108	12,015	9,025	6,324	10,330	11,260	12,000	12,000	12,000	13,000	13,000
QVP Infrastructure Servicing			2,000	6,000							
Roads, Bridges, Paths Sidewalks	7,922	12,015	7,845	7,350	8,200	11,000	10,000	10,000	10,000	6,000	10,000
Underground Infrastructure					2,000	2,000	2,000	2,000	2,000	2,000	2,000
Equipment & Fleet	2,173	5,320	4,954	4,811	2,815	3,590	3,750	3,750	3,750	3,750	3,750
Information Technology	1,055	1,860	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250
Contingency	1,992	1,500	1,000	1,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
Total Deferred and Preventative Maintenance	18,250	32,710	26,074	26,735	26,595	31,100	31,000	31,000	31,000	28,000	32,000
STRATEGIC INVESTMENTS											
Revenue Producing Operations											
Fly Over Theater (Fury Replacement)		19,600	1,031								
Niagara Fury's Attraction/Retail/Washrooms Renewal		3,000									
Niagara Parks Power Station Attraction		2,980	3,125	5,000	1,000	750	750	750	750	750	750
Journey Behind the Falls Tunnel & Table Rock	250	500	3,000	6,000	9,000	5,000					
Table Rock Bistro	1,350										
Aero Car Upgrades								5,000	5,150	5,000	
White Water Walk							1,000	4,800	4,150		
Attraction Development/Renewals				2,000	1,500	1,500	1,500	3,500	4,500	13,800	19,800
Total Strategic Attraction Renewals	1,600	26,080	7,156	13,000	11,500	7,250	3,250	14,050	14,550	19,550	20,550
Fort Erie Break and Recreational Trail	700	600	600	600	600	600	600				
Niagara Parks Marina: Boat Launches/Break wall		5,000	10,000	4,000							
Skating Loop			2,000								
Queenston Heights Tennis Courts		750	500								
Grandview Renewal						1,000	3,000	2,500	5,000	5,000	5,000
Queen Victoria Park (Master Plan & Facility Renewal)					5,855	9,100	11,200				
Botanical Gardens/Butterfly	450	250		550	1,000	1,500	1,500	3,000	3,000	3,000	3,000
Brand Strategy and Wayfinding				500	500	500	500	500	500	500	500
Winter Festival Of Lights	250	310	750	500	500	500	500	500	500	500	500
Environmental (Waste & Recycling /Charging)	350	300	270	115	450	450	450	450	450	450	450
IT Data Centre Move	400	1,000									
Consolidation of Fleet/WEGO Services		2,000	2,650								
Total Strategic All Other	2,150	10,210	16,770	6,265	8,905	13,650	17,750	6,950	9,450	9,450	9,450
Total Strategic Investments	3,750	36,290	23,926	19,265	20,405	20,900	21,000	21,000	24,000	29,000	30,000
Capital Expenditure Actual/Forecast	22,000	69,000	50,000	46,000	47,000	52,000	52,000	52,000	55,000	57,000	62,000
% of Strategic	17%	53%	48%	42%	43%	40%	40%	40%	44%	51%	48%
% of Deferred/Preventative	83%	47%	52%	58%	57%	60%	60%	60%	56%	49%	52%
OPENING CASH	\$ 21,961	\$ 44,429	\$ 16,574	\$ 14,719	\$ 14,965	\$ 14,265	\$ 13,923	\$ 15,060	\$ 15,221	\$ 13,974	\$ 10,903
ENDING CASH - Updated as of Mar 2023	\$ 44,429	\$ 16,574	\$ 14,719	\$ 14,965	\$ 14,265	\$ 13,923	\$ 15,060	\$ 15,221	\$ 13,974	\$ 10,903	\$ 5,095

Loan Summaries:
 TD Matures - October 31, 2027
 OFA Loan - Matures April 30, 2027
 OFA NPPS Loan - Matures January 15, 2033



Debt Financing

Niagara Parks' outstanding long-term debt as of March 31, 2023, was \$34.7 million which is comprised of three loan payments for a total of annual principal and interest charges of \$5.8 million. Two debts will be retired in April 2027 thus reducing the annual loan payments from \$5.8 million to \$2.6 million. The final loan payment to the Ontario Financing Authority for the adaptative reuse of the Niagara Parks Power Station will mature in January 2033. This loan does provide Niagara Parks the option to make a one-time payment against the principal balance of the loan.

10.0 Performance Measures

In addition to the themes of Niagara Parks' 10-year Strategic Plan, the following strategic goals have been established to serve as reference points for business planning to ensure Niagara Parks continues to deliver on its dual mandate of environmental and cultural stewardship while promoting tourism growth and activity to Niagara and the Province. The Performance Measures section outlines specific actions toward achieving these strategic goals.

Strategic Goal #1: Developing and Nurturing Great Guest Experiences

KPIs "Actions"

Collection and analysis of feedback through guest surveys

Niagara Parks collects feedback from guests through a variety of channels and mechanisms, including guest surveys, user-generated content reviews and secret shopper programs. The key objectives of survey collection across Niagara Parks are:

- Providing a mechanism to engage with guests post-visit;
- Assessing satisfaction levels with Niagara Parks products and services;
- Collecting data to use as business intelligence tools that informs decision making;
- Proactively identifying and addressing any trends or issues;
- Ensuring alignment with the priorities highlighted in Niagara Parks' Letter of Direction including the use of data collection as a means to improve how the agency uses data in decision-making, information sharing and reporting, to inform outcome-based reporting and improve service delivery.

All guests who purchase an attractions pass are invited to participate in a digital survey to assess their overall impression of Niagara Parks and experience of their visit through a series of questions, including opportunities for open-ended feedback. Feedback is also collected at Niagara Parks' restaurants and golf courses. Overall, the 2023 guest survey and data collection initiative provided useful insights to inform product development, areas of improvement and which attractions and experiences provide the best overall experience.

In 2022, the attractions pass survey included three questions that asked guests to rate out of ten their overall experience at Niagara Parks, their experience at the attractions included in their pass and how likely they were to recommend to friends and family. Building on the results gathered from the 2022 feedback surveys, Niagara Parks adjusted the questions to guide a more actionable data set for the 2023-24 tourism season, including asking guests to rank their reasons for purchasing their chosen pass product, as well as using a Likert scale to rate their experience with a variety of topics.



The results summary for 2022 is provided below:

Of 274 survey responses received:

- 87% of respondents rated their experience at Niagara Parks an eight, nine or ten out of ten;
- 83% of respondents rated the experiences included in their attractions pass an eight, nine or ten out of ten;
- 87% of respondents rated their likelihood to recommend the attraction package to friends and family as an eight, nine or ten out of ten;
- Of the 274 survey responses received, when asked “tell us about your experience”, 63% or 172 guests took the time to provide written comments via an open-ended question. Those responses were then categorized for sentiment, as presented below:

Feedback Category	%
Positive	59.8%
Neutral (mix of positive and negative feedback)	23.3%
Negative	16.9%

The results summary for 2023 is provided below:

Of 278 survey responses received:

- Respondents were asked to rank their reason for purchasing the pass and the results affirm that value for money is the number one reason for purchase:

Reason Cited	Result
Total cost savings and value for money	47.1%
Included the attractions I wanted	36.8%
Ease of purchase and redemption	8.8%
Convenience of included transportation	6.5%
Other	0.8%

- 95% of respondents rated the value for money delivered by the attractions pass as either excellent or very good.
- Over 95% of respondents noted their satisfaction with the quality of Niagara Parks experiences as “Very Satisfied” or “Satisfied”.
- The online purchase process and subsequent redemption process in-Park also rated very well with the online purchase process achieving a high satisfaction number of 93.5% and the in-Park redemption process scoring a 91.3% in satisfaction.
- The top three sources cited as ways respondents heard about Niagara Parks attraction pass products include the Niagara Parks website (36%); google search (28.4%); and social media (16.2%). It’s worth noting that “word of mouth” was the knowledge source for 13.3% of respondents.

- Approximately 56% or 154 of those surveyed provided written feedback through the open-ended question *“What additional feedback would you like to share related to your experience at Niagara Parks?”* Those open-ended responses were then categorized for sentiment, as presented below.

Sentiment	Result
Positive	51.3%
Neutral (mix of positive and negative)	31.8%
Negative	16.9%

The feedback gathered from the 2022 guest surveys provided insight into three trending topics that inspired negative comments, including long lines, closures of certain attractions and welcome centres, and hours of operation being too short. Niagara Parks then established action plans to address these issues for the 2023 season, as represented in the chart below:

Description of Issue	Action Plan	Status
Long lines at attractions	Implement direct to gate ticketing system for guests who purchased a la carte tickets online (allow guests to skip the point-of-sale line and proceed directly to the admission gate)	Complete
	Fully open all Welcome Centres across the Park to help reduce lines and congestion at attractions	Complete
	Reinstitute timed ticketing (including online for a la carte ticket purchases) to better manage crowds and visitor expectations, particularly during the busiest times of visitation	Complete
	Utilize, where appropriate, line workers to manage the guest experience	Complete
Closures at White Water Walk and Whirlpool Aero Car (required repairs resulted in temporary closures)	Repairs at Whiter Walk required an early seasonal closure of the attraction in the fall, but were completed in time for reopening the following spring	Complete
	Maintenance work at the Whirlpool Aero Car required an early seasonal closure of the attraction in the fall, but completed in time for spring reopening	Complete
Closure of Welcome Centres	All Welcome Centres to open on a regular operating schedule for the 2023 spring/summer season	Complete
Attractions were not	For the 2023 tourism season, Niagara Parks planned for	Complete



open early enough and closed too early in the evening	longer hours of operation at attractions. For 2024, Niagara Parks is once again planning to extend hours of operation for its core attractions in the peak summer months.	
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Of the 2023 guest feedback results gathered so far, the most common trends among negative reviews were as follows:

- Transportation: including crowded buses, long waits or inaccurate information;
- Timed-ticketing: some guests were not pleased that they had to time-ticket to avoid line-ups (would rather flow into the attraction at their own leisure); and,
- Communications: hours of operation, or more information needed to navigate the Park.

As the 2023-24 fiscal year concludes and ahead of the 2024-25 tourism season, Niagara Parks will finalize its action plans to address these issues and any other identified trends from the data.

Invest in new exhibits, tours, and infrastructure at the Niagara Parks Power Station and Tunnel

Building on the success of the first two years of operation at the Niagara Parks Power Station and Tunnel, a new multilingual audio tour, additional exhibits, an integrated nighttime experience and infrastructure work is planned at the site for 2024-27. Visitation patterns and data have confirmed a levelling off in attendance to the Niagara Parks Power Station, following the first two years of opening the attraction. Analysis on these trends will continue, but this softening is likely a natural progression following the exceptional media buzz and attention devoted to the attraction over the last two years since it first opened.

To enhance the guest experience and add overall value, Niagara Parks will be introducing a new audio tour as a value-add, in addition to the paid guided tour option for daytime admission. Based on feedback gathered, Niagara Parks will also be better integrating the Currents sound and light nighttime show into an overall nighttime experience that includes the Tunnel. The rigid schedule of the existing Currents show was a point of frustration both for guests and corporate groups and clients. The integration will allow for a more seamless and flexible nighttime experience for guests.

Niagara Parks is also working with partner organizations to develop new interactive exhibits that will be launched at the power station throughout 2024-27. The Engineering team will be conducting work to open up more of the building, including the original control room and other infrastructure work such as completing the heating of the viewing platform to support a better year-round experience.

As seen with media cycles and activity over the last few years, there is heightened interest in the promotion of new experiences and/or services at Niagara Parks attractions. These new additions at the power station will help Niagara Parks' Marketing and Communications' efforts to position the attraction with earned and paid media opportunities and across its owned digital channels to increase visitation.



Improve connectivity and add to the overall guest experience within Queen Victoria Park with new Visitor Transportation System

Niagara Parks is looking to the private sector for innovative and sustainable ideas for a new visitor transportation system that will link Niagara Parks sites and attractions within the core tourism area of Queen Victoria Park. Over the last several years, Niagara Parks has been investing in its guest experiences, particularly within the core tourism area of Queen Victoria Park, immediately surrounding the American and Canadian Horseshoe Falls. This area includes the majority of Niagara Parks' most popular attractions and experiences, all within a radius of about five kilometres.

Some of the main points of frustration illustrated by the 2023 guest surveys were transportation, including crowded buses, long waits and inaccurate information, as well as information required to navigate the Park. Additionally, during the peak summer months, Niagara Parks experiences intense traffic and gridlock, impacting the experience of all guests, as well as causing safety concerns.

A new visitor transportation system focused on the core area of Queen Victoria Park would augment the existing WEGO bus system, aiming to:

- Enhance the overall guest experience by allowing seamless travel and connection between Niagara Parks sites, while also acting as a new visitor attraction and demand generator for the area.
- Present an environmentally sustainable and fully accessible solution that decreases carbon emissions and improves traffic congestion and visitor flow by reducing the number of vehicles within Queen Victoria Park.
- Provide an additional revenue stream for Niagara Parks, while reducing operating expenses.

The public procurement process was launched in the summer of 2023 with a Request for Proposals (RFP). Niagara Parks will be assessing the results of the RFP and exploring options for a new visitor transportation system throughout 2024-2027.

Audit of Niagara Parks' public washrooms facilities to identify areas of improvement

While Niagara Parks is focused on the experiences of guests at its paid attractions, culinary, transportation and retail outlets, the organization also understands the importance of guest amenities, including the availability of clean and accessible public washroom facilities. Niagara Parks will be conducting an audit of its public washroom facilities to identify any gaps and areas of improvement. Based on feedback and observations taken during the busy summer months, Niagara Parks has already identified certain high-traffic areas to add additional washroom facilities for guests. Temporary washroom facilities were added for the 2023-24 tourism season and permanent new washroom buildings will be added over the course of 2024-27, based on the findings of the audit.



Continue to improve and expand on capabilities and service levels of Guest Services Centre

Niagara Parks' Guest Services Centre strives to provide industry leading support for Niagara Parks customers through a wide variety of channels and continued investment in both staffing resources and technology delivered measurable results to service quality over the past year. The addition of two full-time seasonal Guest Service Representatives had a significant impact on a number of metrics, reducing average first reply times for tickets from 22 to 1.5 hours.

Ticket volumes were also addressed through the integration of guest service ticket data into the design of website content, expanding on page FAQ sections on high-traffic pages to proactively address the most commonly asked questions. In addition, the introduction of a new programmed ChatBot function during peak ticket volume periods also assisted in quick responses to standard questions from guests.

This proactive, data-based approach to efficient and high-quality guest service delivery will be further expanded in the coming years, including the exploration of integration opportunities between guest service agents and on-site Welcome Centre staff.

Strategic Goal #2: Growing Revenue

KPIs "Actions"

Drive visitation to Niagara Parks' highest revenue-producing operations and increase attendance

Niagara Parks has identified that one of the greatest opportunities to increase its revenue is by driving visitation to its highest revenue-generating operations, which are its attractions, including Journey Behind the Falls, Niagara Parks Power Station and Tunnel, Butterfly Conservatory, White Water Walk, Whirlpool Aero Car and its third-party partner experiences, Niagara City Cruises and WildPlay Niagara Falls' Zipline to the Falls and Whirlpool Adventure Course. Promoting visitation to its attractions results in ancillary benefits to a number of different areas of Niagara Parks' operations, including its retail stores, restaurants and parking and transportation services. Over 2024-2027, Niagara Parks will continue to leverage its digital presence and social channels to drive visitation, in addition to its regular sales and marketing efforts.

For the year ending March 31, 2024, Niagara Parks is projecting a contribution of \$158.3 million from all revenue sources, which include retail stores, attractions, parking and WEGO bus service, the Incline Railway, culinary outlets, golf and third-party partners. This contribution is up by \$40.5 million when compared to 2022-23. Niagara Parks experienced a better than anticipated tourism season, which kicked off with an early start to the year, as many RPOs were able to open on April 7, 2023. Niagara Parks launched its summer pass product the Adventure Pass also on April 7, 2023. This early start combined with an increase in visitation from key markets, including the critical American market, resulted in a favourable year for Niagara Parks' RPOs.



For fiscal 2024-25, Niagara Parks is targeting to maintain its contribution, with a budget of \$61.8 million net contributions from RPOs which represents a 2% increase from the projected performance of the RPOs in fiscal 2023-24. This modest increase is largely due to the anticipated financial impacts of closing the Niagara's Fury attraction during construction and preparation for the new attraction, as well as adjustments for the seasonal start and other key operational considerations. This is captured in table 4 below.

Table 5 – Contributions from Niagara Parks' Revenue-Producing Operations

Contribution from Revenue Producing Operations							
(Revenues less Cost of Goods Sold less Direct Operating Expenses)							
(Thousand of \$'s)							
	Retail	Attractions	Parking/WEGO/ Transportation	Culinary	Golf	Total	
April 1, 2024 - March 31, 2025	\$ 11,263	\$ 28,501	\$ 16,143	\$ 5,217	\$ 706	\$ 61,830	
April 1, 2023 - March 31, 2024	\$ 9,896	\$ 28,988	\$ 14,780	\$ 5,164	\$ 809	\$ 60,517	
\$ increase in contribution	\$ 1,367	\$ (487)	\$ 1,363	\$ 53	\$ (103)	\$ 1,313	

Explore opportunities for new revenue generation

Redevelopment of Power Stations

The redevelopment of the Toronto Power Generating Station is a revenue-generating opportunity that will result in a long-term land lease agreement where the proponent will pay an annual base, as well as variable rent payment to Niagara Parks with the building remaining under public ownership. Contract negotiations will be finalized as part of the 120-day due diligence phase, which is set to conclude in the spring of 2024. This will be followed by the groundbreaking in the spring/summer of 2024, a three-year construction period and planned grand opening in the summer/fall of 2027.

Niagara Parks is currently in the evaluation stage for the procurement process for the Ontario Power Generating Station and will continue to explore this opportunity throughout 2024-27. This will be another revenue-generating opportunity for Niagara Parks through private sector investment and partnership with a long-term lease agreement to be negotiated.



Table Rock Bistro

Table Rock Centre is Niagara Parks' highest revenue generating facility located at the brink of the Canadian Horseshoe Falls. Over the last several years, Niagara Parks has been renovating different areas of Table Rock, including Table Rock House Restaurant, Niagara Parks' signature fine-dining restaurant on the top floor and Table Rock Shop, the main retail store for the facility. Continuing with the next stage of redevelopment, Niagara Parks will open the Table Rock Bistro in the summer of 2024, taking over a former retail space that is currently unused and providing better connection to the existing patio. The Bistro will focus on showcasing the best of Niagara's food and drink, including VQA wine, craft beer and spirits from local distilleries. The menu will provide a mid-level price point between the Table Rock Market and Table Rock House Restaurant, seeking to maximize the potential of an already established market of millions of guests that frequent Table Rock each year. Niagara Parks is projecting \$510,000 in net revenue generated by the Table Rock Bistro in 2024-25.

Whirlpool Aero Car Snack Bar

Beginning in the 2024-25 season, Niagara Parks will be reopening its Whirlpool Aero Car Snack Bar. The Snack Bar has remained closed since the pandemic, but increases to visitation to Niagara Parks attractions, and particularly to the Whirlpool Aero Car, has supported the reopening of this guest amenity. Niagara Parks is projecting a net revenue contribution of \$158,000 for the Whirlpool Aero Car Snack Bar.

Assess pricing strategies to maximize potential for Revenue Producing Operations (RPOs)

Each year, Niagara Parks establishes a rates and fees strategy for its products and services to ensure value for money for guests, consistency with industry benchmarks and to maximize margins and revenues to support the financial health of the organization. In proposing pricing for 2024 and 2025, staff reviewed a competitive set of comparable experiences in various categories including in-destination, Western Canada, Toronto, sister-agency, New York City, Quebec, International, Heritage and bundled or packages attractions.

The impact of the proposed pricing increases for 2024-25 will amount to projected incremental revenues of \$2,169,065 for 2024 and \$3,741,263 for 2025, respectively compared to the same data sets from 2023-24.

Leverage Niagara Parks' Digital Presence to Drive Online Sales

Following business interruptions resulting from the COVID-19 pandemic, the last two fiscal years have seen sustained year-over-year growth in regard to both visitation and revenues generated by niagaraparks.com. In 2022-23, the website saw its highest ever traffic, with over 4.5 million visits, a 47% year-over-year increase, while recording over 12 million unique page views, up 36% year-over-year.



These performance measures are a direct result of continuous steps to improve user experience and sale conversion on the website, in concert with a robust digital strategy, which includes dynamic social media content, driving interest and engagement.

The current fiscal year is tracking to be the best ever across all previously mentioned performance metrics. Niagara Parks produced its most profitable week on record for online sales from July 31 – August 6, 2023, generating \$799,000, eclipsing the previous high of \$710,000 set in July of 2022.

Strategic Goal #3: Expand our Digital Service Delivery

KPIs “Actions”

Improve cellular connectivity for guests across Niagara Parks properties

Beginning in 2024-2025, Niagara Parks will be working with a third-party infrastructure provider to improve cellular coverage for Canadians across the Niagara River corridor. This initiative will help solve long-standing issues related to Canadian cellular coverage due to Niagara Parks' properties' proximity to the US border. Following a public procurement process, Shared Tower Inc. was selected as the third-party vendor to install and operate telecommunications infrastructure at various locations across Niagara Parks properties to improve cellular coverage and access to third-party high-speed internet for visitors, Niagara Parks operations and stakeholders, across the entire 56-kilometre Niagara River corridor. A demonstrated leader in the telecommunications industry in Canada, Shared Tower will be working with Niagara Parks, as well as applicable governing land use authorities, local stakeholders, and residents to develop an implementation plan for the new infrastructure.

To be carried out over 2024-2025, the implementation plan will encompass a combination of monopoles and small cell solutions at selected locations based on identified areas of priority. The monopole sites will generally range from 25 metres to 35 metres in height and typically solve network coverage issues with a radius of one to three kilometres, while small cell implementations are often located on existing street infrastructure or on shorter, slimmer poles, addressing network capacity issues in a more targeted geographic area.

Launch of new Consumer Website

A key initiative regarding digital service delivery for 2024-2027 will be the redevelopment of Niagara Parks' consumer website, to be launched in 2025. To prepare for this project, Niagara Parks has begun a comprehensive audit of its current website to identify gaps and areas for improvements, while also undertaking market research. Following a public procurement process, Niagara Parks' internal project team will work with the identified vendor to create a new consumer website that achieves the following objectives:



- Deliver an industry-leading user experience that converts visits to online sales
- Leverage in-house photo and video production resources for impactful visual storytelling
- Build Niagara Parks brand awareness and communicate successes that support its mandate for environmental and cultural stewardship
- Provide a full 1:1 French language user experience that is compliant with FLSA requirements

Digitization of organization-wide processes through Enterprise Resource Planning (ERP) System

Niagara Parks is continuing to explore the capabilities of its Enterprise Resource Planning system, which has significantly improved the speed, efficiency and accountability of its financial services. Through the ERP system, the physical storage of files, records and invoices is no longer required. All records are digitized and managed according to retention policies, which has significantly reduced the potential of error. Additionally, all approvals are completed through the system, allowing for more accountability and visibility for all of Niagara Parks' financial controls.

Strategic Goal #4: Strengthen Collaborations with Partner Organizations

KPIs "Actions"

Grow partnerships with local destination stakeholders

Launch of Fallsview Casino Pop-up Store and Welcome Centre

The result of ongoing collaborations between Niagara Parks and Fallsview Casino, Niagara Parks opened a pop-up retail store in the galleria shopping area of Fallsview Casino in the summer of 2023. The new store connects guests in a high-traffic tourism area of the casino to Niagara Parks attractions and experiences, while offering a selection of high-quality Niagara Falls and Canadian-themed merchandise. The store is staffed by Niagara Parks employees and functions as a combined welcome centre and retail store. The pop-up retail store at the Fallsview Casino aligns with Niagara Parks' strategic goals of strengthening collaborations with partner organizations, as well as growing revenue as the store provides an additional stream of revenue for Niagara Parks. In 2024-25, Niagara Parks will be establishing a more significant presence for the retail store by expanding the footprint and increasing the selection of merchandise available for purchase.

Select Accommodation Program

In the interest of supporting collaboration, partnership and the ongoing recovery of tourism in Niagara, Niagara Parks developed and launched its Select Accommodation Partner program in 2022, adding new partners and further expanding the scope of the initiative in 2023. All participating properties are included on Niagara Parks' "Places to Stay" webpage which is featured in digital promotions that encourage overnight stays in the destination.

As part of the program, Niagara Parks provides "Plug and Play" digital assets to deploy through the partner's sales and marketing channels. Select Accommodation partners are required to include Niagara Parks' attractions in two e-newsletters or similar promotion options to their customer



database, while also providing a limited inventory of overnight accommodations for use in Niagara Parks hosted media initiatives.

Stay and Play Golf Packages

Niagara Parks Golf maintains partnerships with several local hotels to provide stay and play golf packages that combine rounds at a Niagara Parks golf course with overnight stays at some of the destination's top hotels. As part of the partnership, guests are able to choose from six hotel options when building their stay and play package and can book directly on Niagara Parks' website or by speaking with a Niagara Parks representative. The partnership helps to position Niagara Falls as a top destination for golf.

Expand scope and frequency of digital communications to key partners and audiences

Beginning in 2023-24, Niagara Parks launched a new monthly e-newsletter to stakeholders and audiences, including a corporate/government list, destination stakeholders and contacts within a variety of sales markets including business events, educators, and travel trade. The monthly communication shares news and updates from across the organization and helps to keep these key audiences aware of potential changes to operations and new products and services. It also serves as a tool to share stories of our environmental and cultural stewardship work, infrastructure investments and construction projects, the latest media clips and more, to help foster a greater understanding of the breadth of Niagara Parks.

Over 2024-27, Niagara Parks' Marketing and Communications Team will expand its digital communications to include additional e-newsletters to stakeholders and contacts in the areas of culinary and nature and gardens, distributed on a quarterly basis.

Niagara Parks also reintroduced its quarterly community newsletter for residents who live along the Niagara Parkway and areas bordering Niagara Parks property from Fort Erie to Niagara-on-the-Lake. This initiative was paused during the pandemic and brought back in the fall of 2023. Niagara Parks transitioned to a digital version of this newsletter that is distributed to a list of residents who have subscribed to receive it. Over 2024-27, Niagara Parks' Marketing and Communications team will explore ways to increase the number of subscribers to this list, including working with the border municipalities to position it with their audiences.

Niagara Parks also distributes a weekly consumer e-newsletter to a list of subscribed contacts from our website, as well as a biweekly golf e-newsletter and a monthly e-newsletter with the Greater Niagara Chamber of Commerce to promote Niagara Parks to their members.

Throughout 2024-2027, Niagara Parks will aim to meet its current targets including a weekly consumer e-newsletter; monthly stakeholder e-newsletter; quarterly community e-newsletter. Niagara Parks will also explore new markets and audiences for its monthly stakeholder e-newsletter, including a culinary-focused list and nature and gardens.



Ongoing collaborations with Destination Ontario

In 2023-24, Niagara Parks participated in Destination Ontario's spring/summer marketing campaign for the Ontario and drivetime US markets. For the Ontario market, this was a matched \$25,000 investment that highlighted three unique itineraries landing pages that showcased themed itineraries featuring different attractions and experiences.

For the US drive market, the program was a matched \$50,000 investment (\$100,000 total) to position Niagara Parks products through targeted campaigns across digital and social media platforms to drive traffic to Niagara Parks' website and online sales funnel. The campaign targeted a key audience (Buffalo, Rochester, Syracuse, Albany) and positioned Niagara Parks attractions while leveraging the organization's fantastic digital asset library. Total leads to Niagara Parks' website from the campaign were 376,546. The CTR from the campaign was estimated at 2.07%, double the industry average and a click-to-landing page rate of 90%, compared to the average 67% of other campaigns. Niagara Parks will be participating in the program again in 2024-25 with a focus on driving visitation during the fall and winter shoulder season.

In addition to participation in these joint marketing campaigns, Niagara Parks conducts bimonthly meetings with the Destination Ontario team to facilitate information sharing about new products, projects and campaigns and identify opportunities for collaboration and support.

Strategic Goal # 5: Ensuring Strong Fiscal Management

KPIs "Actions"

Operational Review for Retail

Niagara Parks will be conducting an operational review of its retail department, which is responsible for 10+ retail stores, generating annual sales of \$30 million. The objectives of the review will assess the current functions of the retail department in delivering on Niagara Parks' mandate and business requirements; review resource allocations, including staffing, fleet, equipment and supplies; benchmark costs where applicable with industry standards; recommend future functions and operational structure; identify cost savings including a review of cost allocations and develop KPIs that can be used by the CEO for assessing the impact of the review and future changes. The intent of the operational review is to provide best in class service, streamline service delivery and identify cost savings.

Prioritize Opportunities for Grant Funding

In addition to revenues generated by its revenue-producing operations, Niagara Parks actively seeks additional funding for its capital projects in the form of grants and sponsorship opportunities. As Niagara Parks continues to conserve its financial resources, grant funding will be important to supporting a variety of projects, from destination events that promote Niagara Parks experiences to environmental and cultural stewardship projects. Through the Niagara Parks Foundation, Niagara Parks is able to gain additional funding and resources to support its environmental and cultural stewardship work, allowing the organization to take on additional projects beyond its standard scope



of environmental and heritage work. In 2024-27, Niagara Parks staff will continue to collaborate with the Niagara Parks Foundation as well as pursue grants and sponsorship opportunities particularly to help off-set costs related to capital projects.

Increased accountability and visibility for financial transactions through Enterprise Resource Planning (ERP) System

Niagara Parks' Enterprise Resource System (ERP) represents one of the most significant tools for ensuring strong fiscal management and accountability at Niagara Parks. The system has facilitated the digitization of Niagara Parks' financial systems and processes, providing increased transparency and visibility. All invoices are processed through the ERP system with specifically designed workflows to ensure appropriate approvals. The ERP also has audit functionality to conduct another level of review in addition to the many other audit and financial control mechanisms within the organization.

Financial Controls and Audit Processes undertaken by Financial Management Services

Niagara Parks has a number of financial controls and audit processes in place to ensure strong and responsible fiscal management. Revolving cash flow projections are formulated and reported on each month and provided for review at the Commission's Finance and Audit Committee, along with monthly financial statements. Niagara Parks' Financial Management Services is constantly monitoring sales figures tracked against budget and previous year's results. Monthly operational reviews are conducted internally with departments as well as at the Executive and Commission level. Additionally, a year-end audit is completed each fiscal year and presented to the Commission.

11.0 Risk Identification

Niagara Parks provides updates on risks to the Board's Governance, Ethics and Human Resources Committee, the Board and the Ministry of Tourism, Culture and Sport. The Board has approved governing policies for enterprise risk management and internal control. This section summarizes risks and associated mitigation strategies as they affect the business plan over the three-year planning horizon.

Risk 1	
Objective	Niagara Parks operates according to its mandate, in a self-supporting manner without the need for government funding for operations
Risk Factor	While Niagara Parks is recovering well from the pandemic, there are still lingering effects that could impact the performance of Niagara Parks' revenue-generating operations (RPOs), which provide the funding for the organization.
Risk Statement	Niagara Parks would be unable to resume critical or normal operations, in a self-sufficient business model, in the event of a sustained negative impact to visitation over multiple years. Niagara Parks is structured as a self-funded agency without taxpayer support. The majority of Niagara Parks' revenues are variable and dependent on visitation, particularly from higher-yield US and other international visitors (historically over 60% of revenue comes from these markets) while many of its costs, such as policing, parks and road maintenance, are fixed in nature.
Risk Categories	Operational: • Business Continuity • Financial • Infrastructure Strategic: • Reputational
Existing Controls	Continuous monitoring of budget, updated forecasts and cashflow; Strong fiscal management through existing financial controls; Implementation of cost-savings measures resulting from operational review; Workforce management
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Very High (5)
Risk Rating	High (25)
Mitigation/ Action Plan	Niagara Parks continues to reduce its expenditures, including administration and other staffing costs where available; Operational and capital budgets determined based on performance of previous year, visitation patterns, financial trends, cash flow projections, etc.; Identification of new opportunities for revenue generation such as Table Rock Bistro, Fallsview Casino Store, Whirlpool Aero Car Snack Bar and large-scale private sector funding opportunities such as the redevelopment of the power stations and the Visitor Transportation System; Proactive identification of grants and other funding opportunities to support projects and particularly those

Risk 1	
	related to environmental and cultural stewardship.
Target Mitigation Dates	Monthly financial reports to Commission, including cash flow projections

Risk 2	
Objective	Niagara Parks is able to preserve its physical assets, while still delivering on its stewardship role.
Risk Factor	Due to its financial model, if revenues fail to meet budgeted levels, capital repair and replacement would have to be deferred if other funding sources are not available. Over an extended period of time, this could result in failure to adequately maintain assets, financial losses and lost business opportunities.
Risk Statement	From a replacement cost perspective, Niagara Parks has approximately \$360 million in depreciable assets which contribute to its mandate of environmental and cultural stewardship, as well as financial sustainability through self-generated revenues. Prior to the pandemic, Niagara Parks generated over \$120 million in revenues, of which approximately 18% (\$22 million) was spent annually on life cycle maintenance and enhancement of assets to support revenue-producing capabilities and visitor experiences. Due to the financial pressures of the pandemic, Niagara Parks deferred all but the most critical repairs to conserve its finances, which resulted in its list of deferred maintenance growing substantially to over \$200 million.
Risk Category	Operational: • Financial • Business Continuity • Infrastructure • Legal Strategic: • Reputation
Existing Controls	Multi-year capital planning process; Ranking system to identify critical, safety, asset integrity and strategic projects as a priority with available funds; Capital investment and working capital policies to ensure minimum adequate funding to capital maintenance priorities; Budget for deferred maintenance is checked against regular review of margins for revenue-producing operations, opportunities for new revenue growth, identification of redundant assets for sale, potential grant and funding opportunities.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Very High (5)

Risk 2	
Risk Rating	High (20)
Mitigation/ Action Plan	As Niagara Parks has been able to recover from the pandemic, capital spending has been steadily increasing. The capital budget for fiscal 2023-24 was \$22 million, with over 90% of those funds being directed to deferred or preventative maintenance. In fiscal 2024-25 and beyond, capital spending is expected to grow to over \$60 million annually with a balanced spending distribution between deferred maintenance to preserve Niagara Parks' assets and strategic investments to grow tourism and enhance visitor experiences.
Target Mitigation Date	Ongoing; Monthly financial reports to Commission, including cash flow projections

Risk 3	
Objective	Successfully redevelop the Niagara Parks Marina and establish it as a recreational tourism destination to drive visitation to the south Niagara Parkway and surrounding areas.
Risk Factor	Infrastructure failure if adequate investment is not undertaken at the site.
Risk Statement	Niagara Parks will be investing \$19 million to redevelop the marina using a design-build approach, to create a regionally unique, recreation destination appropriate to its parkway and historical river setting. A key component of the redevelopment plans will be increasing public access and use of the marina. There are reputational risks surrounding the project considering the marina has been the subject of multiple redevelopment processes over the years. Current slipholders may not be in support of the redevelopment and required closure of the 2025 boating season to accommodate construction. As the redevelopment will be undertaken as a design-build approach with a third-party, there is the potential of timeline delays due to construction or other factors. There is also the risk of not seeing a positive return on investment as the site has traditionally not been a high revenue-generating operation.
Risk Category	Operational: • Financial • Project/Initiative Management • Infrastructure • Business Continuity • Third-Party/Procurement Strategic: • Reputation
Existing Controls	Extensive consultation process with municipal stakeholders, Infrastructure Ontario (previously), specialists in market sounding; Public consultations to be

Risk 3	
	undertaken.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	Niagara Parks has developed an operating model to show financial implications and estimated ROI for the project; communications plan developed including key messages, tactics, audiences, etc.; public consultations will be undertaken both to collect feedback and to involve current slipholders in the redevelopment process to encourage support of the project; Request for Proposals (RFP) for design build will include specific project goals, expected timelines, all relevant technical studies and reports, mandatory requirements of the design and required approvals.
Target Mitigation Dates	Niagara Parks is aiming to announce the redevelopment project in either December 2023 or January 2024. Plans to launch the Request for Proposals (RFP) for the design-build stage in January 2024 with construction expected to begin in the fall of 2024 through to spring 2026.

Risk 4	
Objective	Maintain a robust and secure network, safeguarding Niagara Parks' digital information
Risk Factor	Cyber threats compromise Niagara Parks' security systems and digital information resulting in business disruption, financial losses, reputational damage.
Risk Statement	If Niagara Parks' network and information security is compromised by a cyber-attack, public confidence and revenues could be impacted. Threats and attacks occur daily. Malware and ransomware continue to be the most common attacks detected by security experts. Malware analysis is time consuming and intensive. At Niagara Parks, attack surfaces are increasing with the deployment of Internet-of-Things (IoT), Software as a Service (SaaS) solutions and external application program interfaces (APIs).
Risk Category	Operational: - Information and IT (Technology Infrastructure; System Availability/Reliability; Cyber Security; Recordkeeping, Access and Privacy) - Financial - Business Continuity Strategic: - Reputation
Existing	High level of competency in IT Senior Team; use of best-in-class second-

Risk 4	
Controls	generation firewalls; geo-blocking to block network traffic from countries that participate in state hacking; threat intelligence data in security defenses; whitelist software; lockdown devices' administrative privileges; rigorous security checklist for SaaS providers and the security of IoT devices; antivirus software; reduce reliance on point-to-point radios; complex passwords and second factor authentication for remote usage; monitor and report staff's remote usage; non-integrated POS payment processing and Moneris point-to-point encryption; PCI compliance requirements incorporated into procurement request specifications; deliver regular security messages and reminders to all users on Niagara Parks' network; cyber insurance coverage; monitor cyber threats as part of information security operations.
Risk Assessment (Residual)	Risk Likelihood: Possibly (3) Risk Impact: High (4)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	In addition to the controls outlined above that are part of regular IT operations, continuous research and exploration of best practices and new technology solutions to assist with safeguarding digital information against cyber threats
Target Mitigation Date	Ongoing

Risk 5	
Objective	Oversee the restoration of both Toronto Power and Ontario Power Generating Stations and their redevelopment as new visitor experiences and revenue-generating opportunities for Niagara Parks through long-term lease arrangements
Risk Factor	Redevelopment of Toronto Power or Ontario Power is not seen to completion and buildings remain liabilities to Niagara Parks
Risk Statement	The two decommissioned power stations have been dormant for 50 years (Toronto Power) and 25 years (Ontario Power) and time has been unkind to the building conditions. The two stations are \$14 million liabilities on Niagara Parks' balance sheet. When the stations were acquired by Niagara Parks, they were mothballed with provisions for approximately 20 years to facilitate potential redevelopment. That timeline is coming to an end. The redevelopment of Toronto Power and Ontario Power will be largescale private sector investments with long-term lease agreements to be negotiated between Niagara Parks and the successful proponent(s) resulting from the three-stage public procurement process. There are potential political sensitivities given other

Risk 5	
	largescale redevelopment projects that have been criticized in the media. There is also the possibility of unforeseen external factors (financial, infrastructure, operational challenges) impacting the proponent's ability to carry out the redevelopment. Niagara Parks is also anticipating much media attention and public interest in the project, underscoring the need for a strong communications and media relations plan.
Risk Category	Operational: • Financial • Infrastructure • Third Party/Procurement Strategic: • Reputational
Existing Controls	Comprehensive communications plan developed including key messages, draft Q&A, media protocol; Experienced spokespersons to handle media interactions; Ongoing collaboration and communication with Ministry staff; Contract negotiations will outline lease payment structure; Depth of experience within Niagara Parks related to long-term lease agreements with private sector companies; Procurement process reviewed in entirety by a fairness monitor; Collaboration with external legal services and financial advisory services as needed; Due diligence phase (120 business days) to carry out heritage studies, archaeology assessment, environmental assessment and consultations; Demonstrated experience of successful proponent in undertaking heritage restoration projects across the Province; Strong project team of Ontario-based companies identified to undertake the work
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium (8)
Mitigation/ Action Plan	Letter of Intent has been signed with successful proponent for the redevelopment of Toronto Power and public announcement has been issued, as directed by the communications plan prepared to support the project. All communication on the project will be guided by the plan to ensure consistency and promote awareness among the public, media and stakeholders in support of the project. Consultations to be undertaken by the proponent as part of the due diligence phase.
Target Mitigation Date	For Toronto Power, ground-breaking planned for summer/fall 2024, three-year construction period and grand opening targeted for fall 2027.

Risk 6	
Objective	Promoting Niagara Parks as a safe destination for visitors and staff

Risk 6	
Risk Factor	Millions of guests visit Niagara Parks each year, with a high concentration of visitors in the core area of Queen Victoria Park which may be vulnerable to risk from security threats and incidents.
Risk Statement	With recent global threats to visitor safety at internationally recognized sites and high traffic areas, a proactive approach to implementing initiatives to maintain safety and security of staff and visitors is required to ensure Niagara Parks remains a safe place to visit and work.
Risk Category	Operational: • Emergency Management - Business Continuity • Physical Security Strategic: • Reputational
Existing Controls	Dedicated Niagara Parks Police Service conducting regular patrol of Niagara Parks properties with a concentration in the core; Resources in Health and Safety, including plans developed for each location within Niagara Parks.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: High (4)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	Niagara Parks Police Service, in conjunction with regional and provincial authorities, continues to develop and implement a safety and security plan to enhance overall safety of staff and visitors in Niagara Parks. Imminent threat emergency exercise at Table Rock and lane closures in the QVP core area have been completed. The QVP master plan considers permanent changes to transportation patterns through core areas in consideration of visitor experience and public safety. Further improvements to lands and facilities are to be designed using Crime Prevention through Environmental Design principles that encourage safety and discourage inappropriate behaviour. Additional Provincial Offences Officers have been hired to provide more presence particularly during the peak summer months in the core area of Queen Victoria Park. Perimeter barriers have been acquired to implement road closures as needed. Proactive road closure plan implemented for peak visitation weekends to protect pedestrians and remove risks associated with traffic congestion.
Target Mitigation Date	Ongoing

Risk 7	
Objective	Maintain a quality workforce with a positive corporate culture to reduce turnover

Risk 7	
	and ensure adequate service levels
Risk Factor	Significant shifts in the labour market, particularly within the tourism and hospitality sectors impact Niagara Parks' ability to attract and retain staff.
Risk Statement	Significant labour shortages in the tourism, retail, hospitality and food services sectors have impacted Niagara Parks, especially given the competition with private sector companies for talent, operating within a major tourism destination. Niagara Parks experienced significant turnover for our fiscal 2023-24 season of 30%, excluding normal attrition, impacting our food services, custodial services and retail departments. For 2019-20, Niagara Parks had a peak workforce complement of approximately 1,800 employees comprising 330 full-time positions and the remaining positions seasonal, part-time and student. The full-time equivalent (FTE) count was approximately 934 positions. Niagara Parks normally has significant fluctuations in its seasonal and student complement throughout the fiscal year. In 2023-24 Niagara Parks saw an increase in visitation to the prior year, requiring an increase to headcount to approximately 1300, which equated to 666 FTE. Challenges to attract and retain staff impact managers' ability to adequately staff their attractions, restaurants, retail stores, etc., forcing adjustments to hours of operation and service levels, impacting revenue generation.
Risk Category	Operational: • Human Resources/People • Financial Strategic: • Reputational
Existing Controls	Workforce planning process to identify operational needs, assess revenue generation and visitation levels to determine staffing needs with a priority on front-line staffing. Talent Acquisition and Retention Plan developed and Committee formed with the following objectives: • Expand talent sourcing to diversify workforce and create strategic partnerships • Niagara Parks brand exposure • Enhanced candidate and employee experience • Retention and engagement • Target recruitment for specialized and hard-to-fill positions
Risk Assessment (Residual)	Risk Likelihood: Likely (4) Risk Impact: High (4)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	Continue to implement the priorities and recommendations coming out of workforce planning process and cross-departmental Talent Acquisition and Retention Committee (TARC), including positioning Niagara Parks' brand,

Risk 7	
	attending and participating in job fairs, hosting new employee engagement events, providing quality training to all new and existing staff, compensation strategy.
Target Mitigation Date	Ongoing with a particular focus on preparing for the peak summer months when workforce levels increase substantially

Risk 8	
Objective	Replace Niagara's Fury with a new Flying Theatre attraction that results in increases to attendance and revenue generation
Risk Factor	Current attraction has reached the end of its lifecycle and requires replacement
Risk Statement	Niagara Parks will be investing \$20 million to replace the existing Niagara's Fury attraction with a new Flying Theatre attraction. Niagara Parks plans to operate the existing attraction through to Labour Day 2024, after which time it will close as construction begins on the new attraction. The new Flying Theatre attraction is scheduled to open in the fall of 2025, resulting in a period of time where no revenue will be generated at the site. Niagara Parks has budgeted for the financial losses of closing the attraction, but unforeseen delays could result in additional financial losses and reputational damage if Niagara Parks is not able to maintain its initial timeline.
Risk Category	Operational: - Financial - Infrastructure - Third Party/Procurement Strategic: - Reputation
Existing Controls	Construction to renovate the ancillary areas of the attraction including retail, washrooms and ticketing areas is already underway; RFP for the attraction development has concluded and a successful proponent has been identified; internal project team assembled who will be working with the proponent on the attraction development; Communications Plan prepared including key messages, Q&A for staff, timelines.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium (8)
Mitigation/ Action Plan	Through the internal project team and Niagara Parks' Engineering team, staff will prioritize ongoing communication and transparency with respect to project updates, timelines, projections, etc. Final contract negotiations may result in adjustments to timelines that will be reflected in Niagara Parks budget planning

Risk 8	
	and communications planning for the project.
Target Mitigation Date	Construction on surrounding areas to prepare for the new attraction has already begun; Planned closure of Niagara's Fury on Labour Day 2024; Construction period (Sept 2024 – April 2025); Planned grand opening of new Flying Theatre attraction in fall 2025.

Risk 9	
Objective	Mitigate impacts to Niagara Parks and its guests by ensuring public safety, minimizing risks to infrastructure, and reducing the net environmental, human, and infrastructure costs of climate change.
Risk Factor	Impacts of climate change affect Niagara Parks' ability to deliver on its mandate of preserving the environment, while damage to Niagara Parks' facilities could result in disruption to business and operations, leading to lost revenue and negative guest experiences.
Risk Statement	Climate change poses numerous risks to Niagara Parks. Extreme weather events can and have caused damage to infrastructure, increased shoreline erosion and flooded parklands and roadways. Extreme heat and drought conditions create unsafe conditions for guests while adding stress to greenspaces and naturalized areas while increasing demand for water. Climate change is also accelerating the introduction and spread of vector-borne diseases (e.g., Lyme disease) and invasive species. Climate change is stressing native plant and animal species, providing less competition for the spread of invasive species, which can damage infrastructure, degrade water quality and result in biodiversity loss.
Risk Category	Operational: • Financial – Economic • Emergency Management – Business Continuity • Infrastructure Strategic: • Reputation • Climate Related/Environmental
Existing Controls	The Niagara Parks Climate Readiness Plan provides guidance on the controls and strategies being used to mitigate the impacts of climate change. NPC's Urban Forestry Management Strategy is designed to create a resilient forest canopy to combat the impacts of climate change. As a result, NPC is actively increasing the forest canopy and biodiversity within Niagara Parks by planting a minimum of 5000 trees annually consisting of a wide range of native species. NPC is also actively restoring the Niagara River shoreline to prevent shoreline erosion and mitigate erosion through the establishment of no-mow vegetated riparian buffers, which includes the removal of invasive species and planting of deep-rooted native plants. The establishment of a wetland at NPC's Gonder's Flats property is also

Risk 9	
	designed to moderate flooding impacts during extreme weather events. An invasive species management program has also been developed to guide the detection, monitoring, and management of invasive plants, insects and disease.
Risk Assessment (Residual)	Risk Likelihood: Almost Certain (5) Risk Impact: High (4)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	In 2021, with the assistance of Brock University, Niagara Parks undertook a Climate Readiness Assessment resulting in the adoption of a Climate Readiness Plan, which highlights the specific risks to NPC as well as potential mitigation strategies. Adopted in 2018, NPC's Urban Forestry Management Strategy and the actions identified within it, directly contributes to ensuring the forest canopy within Niagara Parks remains resilient to climate change.
Target Mitigation Date	Ongoing operational land management practices; targets associated with improving the resiliency of the forest canopy, such as increasing canopy cover to 35%, increasing biodiversity, and having 75% of the Niagara River shoreline covered in native vegetation are expected to be achieved by 2028; other activities, such as improving shoreline protections and managing invasive species is being implemented on an ongoing basis.

12.0 Human Resources and Staffing Plan

Niagara Parks is one of the larger employers in the Niagara region, with a complement of full-time, seasonal and student team members. Many individuals began their careers working at Niagara Parks as a summer student or a student at the School of Horticulture and continued their careers with the organization. Niagara Parks has a large contingent of long-serving employees.

For fiscal 2024-25, the overall key initiatives for Human Resources and Health, Safety and Compliance include:

- **Recruitment, Retention and Engagement:** Due to significant labour shortages in the tourism and hospitality sector, Niagara Parks formed a strategic plan to address the challenges caused by shifts in the labour market. This resulted in the formation of the Talent Acquisition and Retention Committee (TARC), comprised of Human Resources and Front-line management, focusing on diversifying and creating need talent pipelines.
- **Succession planning:** Addressing anticipated retirement levels as well as strategic succession planning across the organization to ensure continuity in key positions. This will include succession plans for each of the senior team positions (including the CEO).
- **Fostering a positive corporate culture:** Ensuring consistent communication, mentoring, training and overall engagement across all levels of the organization will be a priority in 2023-24.
- **Operational review:** Continuing operational and functional reviews of business units and departments to determine further efficiencies within the organizational structure.
- **Contract negotiations:** Three collective agreements representing our employees expired in 2023: OPSEU Local 217 Police Agreement on October 31, 2022, WUCC Local 2347 Server agreement on December 31, 2022 and OPSEU Parks Employees agreement. Niagara Parks reached a settlement for the WUCC collective bargaining agreement. Negotiations for the OPSEU Parks Employees and OPSEU Police Employees are ongoing.
- **Joint job evaluation:** Niagara Parks management and the OPSEU union continue to negotiate Pay Equity with OPSEU Parks Employees Local 217.
- **Program implementation:** Review of process optimization for administrative functions and leveraging existing technology solutions, to create efficiencies.
- **Mandated training:** Expand on existing mandated training and orientation in accordance with legislative requirements, including AODA and Occupational Health & Safety Act as well as Equity, Diversity and Inclusion.
- **Continuous improvement:** Tracking of continuous improvement opportunities within the health, safety and compliance department and other applicable departments.

Talent Acquisition and Workforce Planning

For the 2024-25 fiscal, Niagara Parks will continue to deploy a workforce planning process to identify operational needs, assessing revenue generation and visitation levels to determine minimum and extended staffing requirements across its business units, with a priority on front-line staffing and staffing redeployment to meet visitation demand.



Niagara Parks developed a new Talent Acquisition and Retention Plan in response to the significant labour shortages in the tourism, retail, hospitality and food services sectors. As Niagara Falls is a major tourism destination, there is a lot of competition for talent, particularly with private sector corporations who have the ability to offer financial advantages and other incentives to potential candidates. Niagara Parks is positioning our brand as a focal point of recruitment and retention.

Niagara Parks experienced significant turnover for the fiscal 2023-24 season of 30%, excluding normal attrition, impacting our food services, custodial services and retail departments. This is leading our recruitment strategies to target these hard-to-fill positions. The Talent Acquisition and Retention Plan is designed to meet the following objectives:

- Expand talent sourcing to diversify workforce and create strategic partnerships
- Niagara Parks brand exposure
- Enhanced candidate and employee experience
- Retention and engagement
- Target recruitment for specialized and hard-to-fill positions

As part of Niagara Parks' strategic plan, the Talent Acquisition and Retention Plan is developed in recognition of labour shortage impacts and to further recognize the diversity of the Niagara Region and visitation demographics, embracing inclusion and ensuring equal opportunity.

Niagara Parks' Executive Team and Human Resources continue to develop formal succession planning to identify critical skill inventories and grow top organizational talent for key future vacancies. In some cases, the succession plan may include intentional external recruitment to ensure the organization continues to develop organizational capacity.

Workforce

As a direct result of the continued impacts of COVID-19 on business levels for Niagara Parks, a workforce adjustment plan has been used to guide staffing levels commencing 2021-22, and will continue in the recovery in 2024-2025. The focus will remain on front-line service delivery, redeployment and training, retention and engagement and continued identification of administrative efficiencies across the organization.

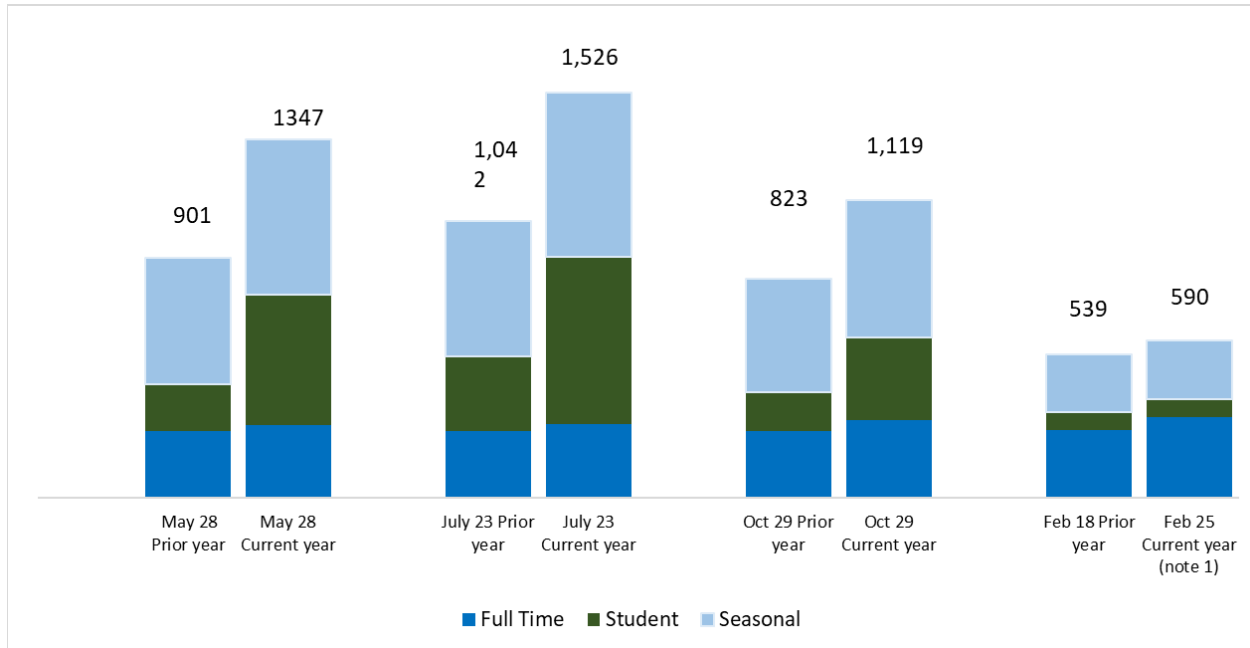
For 2019-20, Niagara Parks had a peak workforce complement of approximately 1,800 employees comprising 330 full-time positions and the remaining positions seasonal, part-time and student. The full-time equivalent (FTE) count was approximately 934 positions.

Niagara Parks normally has significant fluctuations in its seasonal and student complement throughout the fiscal year. In 2023-24 Niagara Parks saw an increase in visitation to the prior year, requiring an increase to headcount to approximately 1,300, which equated to 666 FTE. While staffing levels continue to be lower than 2019-20, the 2024-25 fiscal is expected to assist in establishing a new baseline staffing model.

As Niagara Parks engages in recovery plans from the COVID-19 pandemic, the significant labour shortage in tourism, food services and hospitality industries continues to have implications on

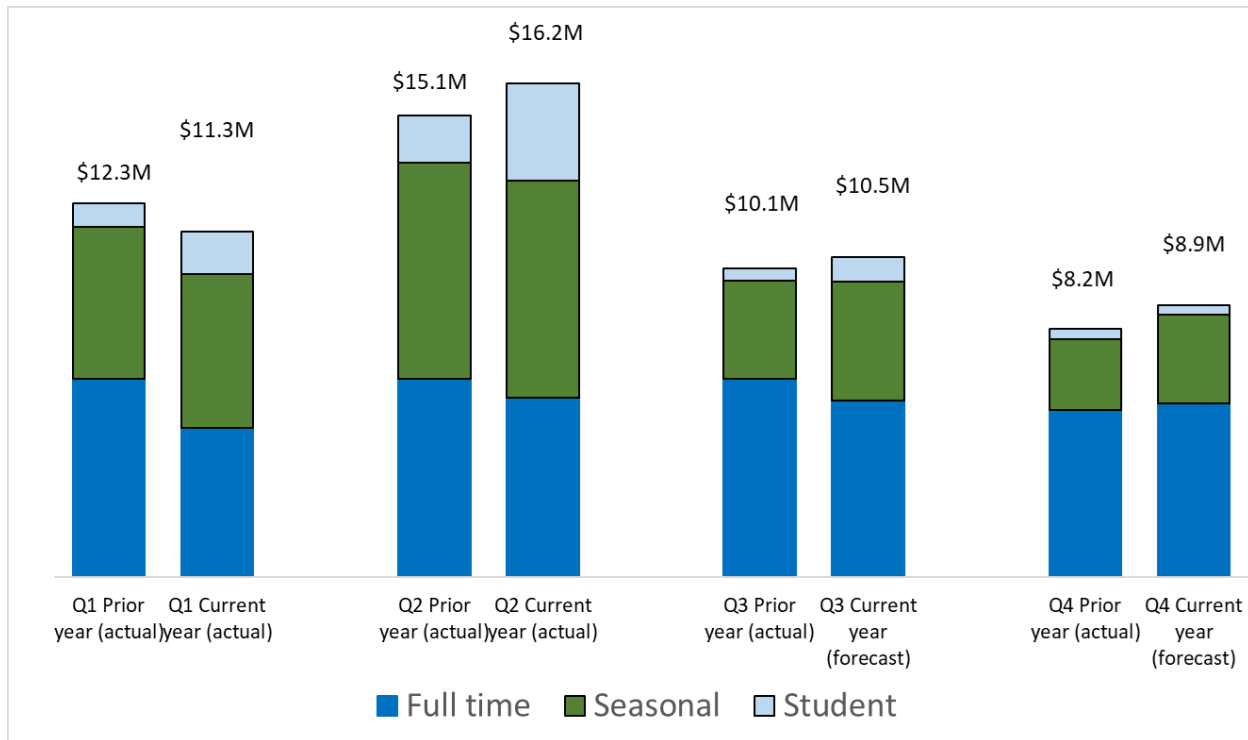
staffing operations. Table 6 below shows a comparison of staffing levels (headcount) for similar pay periods in the current and prior year, and Table 7 shows the projected wages and benefits paid per quarter, for the current and prior year.

Table 6 - Number of Employees Paid: Prior Year (2022-23) versus Current Year (2023-24)



Note 1: Forecasted student counts are based on utilizing 40 students as part of the School of Horticulture's paid experiential learning component.

Table 7: Wages/Benefits by Quarter, in millions of dollars: Prior Year (2022-23) versus Current Year (2023-24)



For 2024-25, Niagara Parks continues to take a conservative approach, anticipating a gradual economic recovery for the tourism sector. Based on this, the forecasted FTE for 2024-25 and 2025-26 is estimated to grow to support the increase in visitation, revenues, and events, which will enhance visitor experiences.

Service Delivery and Administrative Efficiencies

In 2023, Niagara Parks continued to strengthen its Human Resources functions and client service delivery, focusing on continued modernization and efficiency of Human Resources programs and processes and customer service initiatives.

Niagara Parks continues to focus on core elements of Human Resources to streamline and enhance service delivery and reporting. This has included leveraging existing systems for integration with pension and benefit vendors to facilitate administrative efficiencies and reporting.

Niagara Parks Human Resources engaged with our current payroll provider to ensure system use optimization and is currently implementing programs.



Labour Relations and Employee Engagement

A priority of Niagara Parks is its focus on employee engagement and the strengthening of labour relations efforts.

Resulting from COVID-19 implications, staff events were suspended at Niagara Parks in 2020-21 and 2021-22. In fiscal 2022-23 and fiscal 2023-2024, Niagara Parks returned some events to celebrate the success of our team members. These included events to support United Way and holiday events for staff. Niagara Parks continued with centralized and increased communications to the workforce, in recognition of the importance of clarity and engaged team. A focused effort continues to be on corporate culture and an emphasis by the CEO and the senior team on employee engagement. These efforts will continue throughout 2024-25.

Learning and Development

Niagara Parks continues annual orientation and refresher training each season for new and existing staff. Mandatory training has been completed and will be ongoing in preparation for the 2024-25 season as employees return from layoff and new employees hired.

In addition, Niagara Parks continues partnerships with tourism and hospitality organizations, including OTEC Tourism SkillsNet Ontario, Brock University and Niagara College, to identify learning and skill enhancement opportunities for staff and potential candidates. In 2023-24, Niagara Parks partnered with OTEC to provide training to front-line management and unionized staff in Resiliency and Retention.

Compensation Strategy

Niagara Parks' compensation strategy is to be a competitive employer that offers fair wages, salaries and benefits in relation to the comparative market. Niagara Parks' positions are benchmarked against the southern Ontario market outside of the Greater Toronto Area at the 50th percentile for its full-time positions.

Niagara Parks offers a benefit package to its full-time employees that is comparable to other Ontario Public Service employees. Seasonal unionized staff receive payment in lieu of benefits as negotiated between the parties.

Niagara Parks staff, excluding students, are also eligible to participate in one of the pension plans offered through the Ontario Pension Board and OPSEU Pension Trust.

Future Priority Work

The following priorities will be addressed as resources are available:

- Learning and Development
- Implementation of Equity, Diversity and Inclusion program
- Cross training and development initiatives resulting from redeployment of staff



- In conjunction with front-line operations, focus on Guest/Customer Service Training program

Talent Acquisition

- Advance the Talent Acquisition and Retention Plan
- Develop a baseline workforce plan with three-to five-year projections

Employee/Labour Relations

- Enhance cross-functional teams to engage employee input into initiatives, plans and projects
- Develop an employee wellness program leveraging current service providers

Compensation

- Focus on Joint Job Evaluation program for applicable unionized employees

13.0 Information Technology and Electronic Service Delivery Plan

For 2024 to 2027, the Information Technology division will remain committed to bolstering Niagara Parks' dynamic business landscape by fortifying the infrastructure and connectivity of Niagara Parks sites and attractions. Through substantial enhancements in cellular and WiFi services, IT will be at the forefront of elevating digital service delivery across Niagara Parks. In tandem with evolving processes, Information Technology will collaboratively engage with internal departments and external stakeholders to bring about improvements in ERP applications, procure new software solutions, and create in-house applications and integrations essential to meeting evolving business demands. Additionally, we will persistently advance our network and data security measures, ensuring adherence to PCI-DSS compliance to safeguard the sensitive payment cardholder data of NPC visitors.

These objectives will be realized through our audited IT policy framework comprising 48 policies that offer invaluable direction and guidance to our Information Technology team. This framework is instrumental to three core functional areas within IT: Network and Infrastructure Services, Application Services, and Client (Helpdesk) and Infrastructure Services. The ensuing summary provides an overview of our accomplishments in the 2023-24 fiscal year and a glimpse into our strategies for the 2024-25 financial period.

Network Services

These 2023-2024 Network Services accomplishments demonstrate the dedication to maintaining a secure, efficient, and robust network infrastructure for the Niagara Parks Commission.

- Procured and received hardware for three out of four outdoor Wi-Fi zones spanning from the Floral Showhouse to the Clifton Hill area, with Zone 2 scheduled for completion in the first quarter of 2024.
- Deployed a cellular connected firewall for the Casino Pop-Up shop, alongside the setup of Point-of-Sale units, receipt printers, ticket printer, and associated peripherals.
- Upgraded two primary high availability / failover firewalls, reinforcing our internet security posture.
- Procured Palo Alto firewall maintenance and Wildfire "threat intelligence cloud" subscriptions for 15 network firewalls, enhancing our defense against malicious access attempts.
- Expanded the fiber network at the Butterfly Conservatory to support increased network connectivity.
- Extended the fiber network at Whirlpool Golf to reach the Halfway House building, facilitating network and applications access.
- Upgraded Cortex XDR to bolster protection against zero-day exploits, malware, ransomware, and file-less network attacks.
- Completed a vigilant review of social media threats and in compliance with the Ontario government's directive, removed the Tik Tok Application from NPC-owned corporate devices.
- Developed and delivered Cyber Security Phishing Training for staff responsible for managing pin pads.



- Without business interruption deployed 17 new ADP Timeclocks to enhance employee timekeeping efficiency.
- Completed the 2023 PCI-DSS internal audit and subsequent Attestation of Compliance (AoC), reaffirming the commitment to PCI-DSS compliance and protecting visitor's payment cardholder data.

Application Services

Application Services made significant strides in enhancing our operational efficiency and delivering information technology refreshments in 2023:

- Successfully replaced 66 end-of-life Culinary Point of Sale (POS) devices with the latest Point of Sale (POS) units available.
- Upgraded our infrastructure by replacing end-of-life ticket printers and attraction ticket scanners.
- Collaborated with an NPC Vendor of Record (VOR) to have required application program interfaces (API) integrated as part of the Retail Pro Prism conversion project.
- Provided support for the internally developed Performance Appraisal System that went live on February 1st.
- Provided support for the internally developed Human Resources Change Status System for the management and workflow of staff changes. The system went live on February 1st.
- For the new Garden Café's restaurant upgraded the Point of Sale (POS) server to ensure performance for guest ordering and payment processing.
- Developed a Health and Safety solution for tracking and managing Automated External Defibrillator (AED) inspections, helping to ensure AED's are working when needed.
- Developed an application program interface (API) between Automatic Data Processing (ADP) and Windows Active Directory (AD). This integration updates critical fields into Microsoft AD and Microsoft Outlook. The API also identifies changes to employee status so AD and other applications can be administered in a timely manner.
- Updated the Parks Washroom Management inspections application, used for the tracking and management of Niagara Parks washroom inspections.
- Redeveloped the reporting system for the tracking and distribution of monthly Rogers mobile bills, empowering staff to manage their mobility devices and associated costs.
- In Unit4 ERP, developed Facilities Management reporting solution to enable work order and labour reporting. Also developed new work order by requestor reporting.
- In Unit4 ERP, developed forms for the collection and reporting of financial transactions and data. (ex. "AP Expense Approval Form", "Payroll Approval form", "Procurement Card Quarterly Spending Review" and the "Internal Charges form")
- As required, delivered ongoing application administration (account management, permissions, change management) for the Unit4 ERP and Unit4 Financial Analysis and Planning applications.



Helpdesk and Infrastructure Services

The following selected highlights demonstrate the Helpdesk and Infrastructure Services value:

- Collaborated with Engineering to facilitate the IT infrastructure upgrades for the Journey Behind the Falls, Queen Victoria Park Café, and Garden Café renovations.
- Enhanced Oak Hall's internet speed and performance by boosting internet bandwidth.
- Strategically replaced eight end-of-life multi-function printers across the NPC organization, resulting in improved printing speed and performance.
- Successfully upgraded the Simple Mail Transfer Protocol (SMTP) server to the latest version, enhancing the email workflow and routing for NPC developed applications.
- Expanded IT data storage capabilities with the implementation of an upgraded Cohesity solution.
- Restored communications at the White Water Walk attraction by replacing the failed telephone system.
- Strengthened our IT infrastructure by adding Dell ESX physical hosting servers configured for VMWare.
- Demonstrated exceptional support by receiving and resolving an average of 384 IT helpdesk requests monthly as of October 22, 2023. This is a +15% increase over prior year.
- Effectively provided Helpdesk support for a growing array of devices, including printing devices, Wi-Fi access points, switches, Internet of Things (IoT), data collections, databases, multi-function printers, mobile devices, telephony devices, and various other network devices.

Plans for 2024-25

Network Services

- Complete the final outdoor Wi-Fi zone improving outdoor Wi-Fi from the Floral Showhouse to the Clifton Hill area providing guests, employees and NPC stakeholders with connectivity to applications and the internet.
- With the renovations to White Water Walk boardwalk, improve the guest wifi experience.
- Provide networking and connectivity for new Flying Theatre attraction that will replace Niagara's Fury. With the new Table Rock attraction (replacing The Fury) provide networking and network connectivity to the internet.
- Branch the fiber network to cellular monopoles and cellular small cells to enable fast and reliable cellular transmission, crucial for supporting the growing demands of modern digital communication, and business operations.
- Within the fiber network develop redundant network paths to minimize downtime and ensure uninterrupted connectivity by automatically rerouting data during a network failure, thereby enhancing network reliability and resilience.



Application Services

- For the new Table Rock Bistro, implement new POS systems, POS software/licensing, cabling, and wifi to enable efficient operations, and secure payment processing to create a positive guest experience.
- Support the new Flying Theatre attraction and modify existing applications and reporting to accommodate the new attraction.
- Replace end-of-life ticketing POS systems and peripherals to ensure POS reliability, optimal performance, and continued vendor support, thereby maintaining operational efficiency.

Client Services and Infrastructure

- Increase 3PAR storage to provide support the continued growth in file files and media.
- Implementation of new CCTV devices to enhance security, deter crimes and provide valuable surveillance data for informed decision making.
- For disaster planning invest in critical storage, switches, and networking to mitigate risks, minimize potential financial losses, and ensure the continuity of essential operations in the face of unforeseen business disruptions.
- Further invest in tape backup and recovery solutions as a cost-effective and reliable means of data archiving and recovery, ensuring the safeguarding of critical information and business continuity in the event of data loss or system failures.
- Replace select "end of life" telephony systems, modernizing communication infrastructure to enhance reliability, functionality, and scalability, while ensuring continued seamless communications for business operations

14.0 Initiatives Involving Third-Parties

1. Business Development, Events, Communications and Marketing

Third Party Name	Business Objective	Business Strategy
Niagara City Cruises	Operator for boat tour service for Niagara Parks under a 30-year agreement that began in 2013.	The boat tour is a Canadian Signature Experience and a key demand generator for Niagara Parks and the destination. Niagara Parks works collaboratively with Niagara City Cruises on packaging and promotions to drive higher visitation and revenue.
Niagara Adventure Excursions (operating as WildPlay Niagara Falls)	Operator of two attractions for Niagara Parks: Zipline to the Falls and Whirlpool Adventure Course, under what is now a 20-year contract (pending the meeting of set investment criteria) that originally began in 2014.	The zipline and adventure course are two attractions that offer guests an opportunity for an adventurous experience.
Falls Fireworks Series	Activate fireworks series and coordinate the program on behalf of local stakeholders.	Fireworks enhance visitation for all partners. The program runs in the summer (May to Thanksgiving). Fireworks is intended to extend the guests' stay in Niagara Falls, including encouraging overnight stays.
Illumination Support of the Falls	Niagara Parks is a member of the Niagara Falls Illumination Board, a not-for-profit corporation made up of 18 representatives from the City of Niagara Falls (Ontario), Ontario Power Generation Inc., City of Niagara Falls (New York), New York State Parks, New York Power Authority.	It is the Illumination Board's responsibility and mandate to finance and maintain the nightly illumination of both the Canadian Horseshoe and American falls. The Falls' illumination is another key activation for the destination.
WEGO Vehicle Transportation System	In August 2011, Niagara Parks and the City of Niagara Falls signed a 10-year agreement to develop an integrated Visitor Transportation System, known as WEGO, to provide a seamless connection between tourist areas within the City and Niagara Parks' sites and attractions.	Niagara Parks received 11 new fully accessible buses (nine articulated/two single buses) as part of the overall \$50 million in funding provided to the City by the federal and provincial governments for this project. Annually \$1.15 million is paid by Niagara Parks to the City as part of a 10-year agreement. Following the expiration of the agreement in August 2024, Niagara Parks is working with the Niagara Falls Hotel Association to create new a model for an integrated bus visitor transportation system.

Regional Tourism Organization (RTO)	RTOs have the responsibility for marketing as well as longer-term strategic planning for tourism regions, including product development, workforce strengthening and the provision of travel information.	Niagara Parks serves on the board of the RTO. Participation allows Niagara Parks to take part in and help influence the cooperative advertising and marketing strategies to promote visitation and increased stays within the region.
Niagara Falls Convention Centre	Niagara Parks is a founding partner in the Scotiabank Convention Centre in Niagara Falls. Niagara Parks has a seat on the board of directors.	Niagara Parks supports the Convention Centre to help draw meetings and conventions to the destination and Niagara Parks receives business from those conventions.
Niagara Falls Tourism	Niagara Parks is a member of Niagara Falls Tourism and serves on the board for the local destination marketing organization.	Tourism is a critical part of Niagara Parks' business and having a strong and well-performing Destination Marketing Organization (DMO) is important in providing marketing programs that benefit the destination and Niagara Parks.
Winter Festival of Lights	Niagara Parks was a founding partner in the original community event and remains a significant contributor to what is now a tourism-led event by way of lighting design, programming and manual support.	The event draws visitors to Niagara Falls and extends the destination's season. Winter Festival of Lights is overseen by Niagara Falls Tourism with funding support from the Niagara Falls Canada Hotel Association.
Culinary Tourism Alliance (CTA)	Organization promoting champions of local food and beverages in Ontario	Membership and Feast ON certifying Niagara Parks' full-serve restaurants supports brand alignment and provides positive economic impact.
Ontario Restaurant Hotel and Motel Association (ORHMA)	ORHMA is an organization supporting the restaurant and tourism industry in Ontario and is linked to Restaurants Canada (formerly Canadian Restaurant and Foodservices Association)	Niagara Parks is a member and works in partnership to promote the industry and serve on the Board.
Golf Canada	Golf Canada is the National Sports Federation and governing body for golf in Canada representing 271,000 golfers and 1,400 member clubs across the country. Golf Canada's mission is to increase Canadian participation and excellence in golf.	Niagara Parks Golf maintains membership and participates in many of Golf Canada's programs including supporting for Professional and Amateur competitive events and grow the game initiatives.
Stanley Thompson Society	The society is committed to celebrating and preserving the legacy of Canada's premier golf architect Stanley Thompson.	Whirlpool Golf Course is a Stanley Thompson designed golf course and supports the society with membership. The membership enables networking opportunities, research, archives and learning more about Thompson through guest speaker series.

Digital Attractions	Operator of the FX Studio photo capture services at Table Rock Centre and Grand View Marketplace. The studio captures photos of guests at Journey Behind the Falls, Hornblower Niagara Cruises, White Water Walk and Butterfly Conservatory.	Operations are also being implemented at Whirlpool Aero Car.
Whirlpool Jet Boat Tours	Operator renting excess space at Floral Clock	Brings traffic to Floral Clock retail store
Pinnacle Scopes	Operator of viewing machines	Provides amenity to guests and revenue for Niagara Parks
Metrolinx	Metrolinx, an agency of the Government of Ontario under the Metrolinx Act, 2006, was created to improve the coordination and integration of all modes of transportation in the Greater Toronto and Hamilton Area.	Promotional partnership with Metrolinx in 2017 to support summer train service to Niagara including bike storage cars on each train schedule. Partnership facilitates access to other Ontario markets as well Metrolinx's broader mandate to encourage and support cycling and active transportation.
District School Board of Niagara and Niagara Catholic District School Board	Co-op education placement in Niagara Parks culinary venues	Supports tourism as an opportunity for employment and assists in recruitment
Ministry of Labour, Training and Skills Development	Coordinating apprenticeships for trades in Ontario	Used by culinary services for chef apprentices (in addition to other departments utilizing apprentices in trades)
Niagara College – Canadian Food and Wine Institute	Work in partnership for apprenticeships and co-op programs for culinary services	Supports local job economy and recruitment efforts
Destination Canada	Destination Canada, the national marketing organization, promotes Canada as a travel brand in key international markets.	Niagara Parks leverages marketing programs offered by Destination Canada ranging from meetings and conventions, travel trade, digital marketing and travel media relations.
Destination Ontario	Destination Ontario, as the provincial marketing organization and sister agency, provides important marketing initiatives that support Niagara Parks' tourism marketing efforts.	Niagara Parks' leverages consumer, travel trade and travel media relations activities that Destination Ontario develops each year.
Destination Toronto	Niagara Parks is a member of Destination Toronto, the official destination marketing organization for Toronto.	Niagara Parks leverages sales and marketing programs offered by Destination Toronto, including international meetings and convention leads, travel trade and travel media opportunities.

2. Environment

Third Party Name	Business Objective	Business Strategy
Environment and Climate Change Canada and the Ontario Ministry of Natural Resources and Forestry (MNRF)	To acquire resources needed to protect, maintain and preserve natural areas that make up 25% of Niagara Parks' lands.	In addition, resources are used for education and outreach both internally and externally.
Niagara College and Brock University	Provide expertise for various environmental, recreational and technical programs to support Niagara Parks' stewardship program and Botanical Gardens.	Provide NPC staff with valuable data. In 2018, NPC signed a memorandum of understanding with Brock University to collaborate on environmental stewardship initiatives. NPC and Brock University are planning to expand this partnership into other business units and departments.
Science North	Support programming at the Niagara Glen Nature Centre and the Butterfly Conservatory.	Liaise with Science North to manage the Nature Exchange program at the Nature Centre and develop new exhibit at the Butterfly Conservatory.
Audubon International	The Audubon Cooperative Sanctuary Program for Golf is an award-winning education and certification program that helps golf courses protect the environment and preserve the natural heritage of the game of golf. By helping people enhance the valuable natural areas and wildlife habitats that golf courses provide, improve efficiency, and minimize potentially harmful impacts of golf course operations, the program serves an important environmental role worldwide.	To achieve certification golf courses must demonstrate a high degree of environmental quality in 6 separate categories. Legends on the Niagara has achieved full certification while Whirlpool continues to progress. The certification is promoted to guests as a sustainable initiative through events and various communications.
Corporate and non-profit support [OPG, Vineland Research and Innovation Centre, Friends Groups, Naturalists, Niagara Peninsula Conservation Authority, Land Care Niagara, MNRF, Ontario Access Coalition (Boulderers), Royal Astronomical Society Club – Niagara Centre, Niagara Geological Society]	Alliances have allowed for environmental, educational and recreational initiatives that Niagara Parks would not otherwise have the internal resources to achieve.	Collaboration provides support for numerous preservation and restoration activities on Niagara Parks' lands.
Forests Ontario and Ontario Woodlot Association	Research and development of tree seed collection strategy and forest management practices.	Provides the opportunity to offer forest management and seed collection related workshops and training to Niagara Parks staff.

Ontario Power Generation (OPG)	Improvements on the Lands Protection Program.	Partnership with OPG provides funding and technical support to Niagara Parks in its native tree planting and reforestation efforts.
Monarch Teachers Network, Toronto and Region Conservation Authority and Niagara Falls Nature Club	To increase the education programming and outreach of Niagara Parks' Butterfly Conservatory.	Provides the capabilities to offer educational programming to local teachers and students using monarch butterfly life history along with providing funding to offset monarch workshop costs to participants.
Canadian Food Inspection Agency	Research in management and control of invasive species.	Research in controlling damage from emerald ash borer and hemlock woolly adelgid.
Trail and cycling organizations (Greater Niagara Circle Route, TransCanada Trail, Waterfront Trail, Greenbelt Route, Ontario Trails Council, Venture Niagara, Ontario by Bike)	Increase promotion and development of cycling opportunities and infrastructure within Niagara Parks and the surrounding region.	Provides opportunities for joint marketing initiatives, access to funding and trail management expertise as it relates to the Niagara River Recreation Trail.
American Public Gardens Association	Niagara Parks is a member of American Public Gardens Association, a preeminent association for public garden professionals and serves on the board to gain an advanced understanding of the field of public horticulture.	Niagara Parks leverages its board membership to gain insight into best practices, offered through educational and networking opportunities,

3. Heritage and Legacy

Third Party Name	Business Objective	Business Strategy
Parks Canada	National park service for Canada that cares for sites like Fort George and Brock's Monument.	Collaboration on events and tours. Cross-promotional opportunities as appropriate. Niagara Parks has an MOU with Parks Canada (updated in December 2020). Cooperate on maintenance requests, best practices for the care of parklands, collaborate with staff and volunteers at annual events. They are the local representative for the National Historic Sites and Monuments Board of Canada.

The Mackenzie Printery Group	Volunteer organization with specialized skills to maintain the Printery Collection at Mackenzie Printery heritage site.	Collaborate with local community association to showcase the history of printing.
Plenty Canada	Indigenous Plant trail along the Niagara Escarpment to understand the ecology inventory	Collaborate with the appointed UNESCO biosphere reporting team for the Niagara Escarpment designation process. Work on trails and plant communities within Queenston Heights Open Space.
Landscape of Nations 360	Indigenous Education Initiative to provide a comprehensive understanding of the Indigenous experience in the Niagara Region through partnership with indigenous leaders and educators to enhance how Indigenous histories, cultures and contemporary issues are taught in K to 12 classrooms	Supports the Niagara Parks mandate of preserving the cultural stewardship of the Niagara River corridor through recognition of the important role of indigenous people held in the history of the region.
Friends of Laura Secord	The Friends of Laura Secord is a community group with the primary goal of preserving, strengthening and perpetuating the Secord legacy so it can continue to inspire and educate future generations about the many people who helped to define Canada.	Collaborate on summer events and share in highlighting the life and era of Laura Secord.
Museums of Niagara Association (MONA)	Community museums in the Niagara region with similar collections and professional standards.	Collaborate on events, share best practices and assist in case of emergencies.
Ontario Museum Association (OMA)	Provincial association for museums and historic sites providing training in a number of related subjects.	Annual conference attendance and organization.
Museums Canada	National group of museums and museum vendors.	Collaborate on annual conference and communicate on best practices.
Canadian Museums Association	Largest national group of museums	Collaborate on annual conference and communicate on best practices.
Buffalo Naval Park	Lake front and canal side museum with surviving warships in site of Old Fort Erie.	Work on events together and with Americans making up the majority of visitors to the Old Fort, cross-promote locations to visitors with similar interests in military history.

Municipal Museums along the Niagara River	Responsible for the local community collections and public programming.	Niagara Parks staff have the most contact and cooperation with the Town of Fort Erie Museums, The City of Niagara Falls Museums and the Niagara on the Lake Museum. Directly working on public events, research, exhibits and sharing regular communications regarding site activities.
Underground Railroad heritage Centre	Museum in the Niagara Falls, New York Amtrak train station.	Cooperation on events and highlighting Black history on both sides of our shared border.
Old Fort Niagara Association	A significant historic site on the New York side operated by a non-governmental not-for-profit organization.	Staff and volunteers work together on annual events, sharing information on collections and research.
Friends of Fort George	Not-for-profit organization that supports Fort George and staffs Brock's Monument	Working with Parks Canada to communicate staff and maintenance needs at Brock's Monument. Cooperate on Queenston Heights events and tours.
Parkway Artists' Guild	Volunteer group interested in the arts.	'Paint days' at our sites interacting with the public and working through Retail they sell items at our locations.
Fort Erie Native Friendship Centre	Cultural and community hub for the Indigenous community in Fort Erie	An important source for research, events and recruiting in Fort Erie.
Niagara Regional Native Centre	Cultural and community hub for the Indigenous community located in Niagara on the Lake.	An important source for research, events and recruiting for our locations in Niagara on the Lake.
Tubman Tours of Canada	Provides Black History tours to groups visiting Niagara.	Source for research, event planning and cooperation with the interpretation of Black history along the river corridor.
Lundy's Lane Historical Society	The volunteer historical society for the City of Niagara Falls.	Research, presentations, publications related to many of our properties and an excellent source for information.
Bertie Historical Society	The volunteer historical society for the Town of Fort Erie.	Research, presentations, publications related to many of our properties.

Reenactment Groups	Volunteer groups that make up the bulk of our volunteer hours.	Crown Forces 1812 US Forces 1812 Fenian Brigade Brigade of the American Revolution Napoleonic Society
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4. Niagara Parks School of Horticulture

Third Party Name	Business Objective	Business Strategy
Olds College, Olds Alberta	Articulation agreement for Niagara Parks' School of Horticulture graduates to obtain a Bachelor of Applied Science Degree (block transfer).	Supports corporate excellence objective in building the Niagara Parks' School of Horticulture program as a national program of recognition.
National Association of Landscape Professionals (NALP), United States	This governing body of the landscape industry for North America has accredited Niagara Parks' School of Horticulture program as being the equivalent of a four-year bachelor's degree program.	Supports Corporate Excellence objective in building Niagara Parks' School of Horticulture program as a national program of recognition.
Niagara Catholic District School Board	This partnership allows high school students enrolled in horticulture and a high skills major program in horticulture to complete their studies at the Botanical Gardens with a hybrid teaching model using class lectures with studies in the gardens and working with Niagara Parks' students.	Supports growth of Niagara Parks' diploma program through enhanced reach to potential future students and increases applicants to program.
Niagara District School Board	Niagara Parks will support the DSBN to deliver portions of their Green Industries Specialty High Skills Major – "Dig It" program's curriculum within the Niagara Parks Botanical Gardens	Supports and benefits Niagara Parks by further expanding the presence of the School of Horticulture in the local educational market.
Canadian Garden Council	Continued support as founding member to increase promotion of Niagara Parks, the Botanical Gardens, the School of Horticulture and other Canadian gardens and tourism experiences, education opportunities and to cultivate joint marketing strategies.	Provides opportunity for joint marketing initiatives and access to resources from participating members. Requires further study to develop staffing plan.
Master Gardeners of Ontario, Garden Club of Niagara and Horticulture Society of Niagara Falls	Partnership to provide learning opportunities to visitors, students and members to advance awareness and education (agreement to be developed).	Supports growth and development of the visitor experience at the Botanical Gardens and creates other revenue opportunities for the partners.

School of Horticulture Alumni Association	Promote and support Niagara Parks' School of Horticulture, its current students and alumni.	Niagara Parks staff liaise with the Alumni Association supported by its terms of reference.
Niagara College	Strategic alliance for the mutual benefits towards increased educational, training and employment goals for students and graduates	Steering Committee to pursue a variety of practical work or internship opportunities, as well as advanced standing evaluations cross institutionally
Longwood Gardens	The Facilitations of Longwood Fellow's placement at the NPC premises with the aim of promote leadership development of the fellow and to exchange intellectual capital, skill and expertise.	The parties work together to ensure the placement is adequately and appropriately assigned projects, assignments and work to support the leadership development of the Fellow

15.0 Communications and Marketing Plan

Overview

An integrated marketing and communications approach for Niagara Parks focuses on driving increased visitation to the organization's primary revenue-producing operations.

Marketing and communications efforts for the 2024-2027 fiscal period will prioritize maximizing attendance and revenue generation at Niagara Parks attractions, putting these experiences front and centre in its promotional efforts across all channels. A focus on driving attendance and revenue at attractions will have a halo effect that benefits Niagara Parks' other revenue-producing operations such as culinary, retail, transportation, and parking services.

Marketing and communications efforts will continue to leverage owned digital products, including Niagara Parks' website and social media accounts along with strategic investments on proven high ROI external channels and publications to drive measurable and repeatable results.

Strategic Goals

Consistent with the themes of its 10-year Strategic Plan, Niagara Parks' marketing and communications efforts will continue to be guided by the following strategic goals:

- Developing and nurturing great guest experiences
- Growing revenue
- Expanding our digital service delivery
- Fostering strong collaboration with partner organizations
- Ensuring strong fiscal management

Objectives

Niagara Parks' Marketing and Communications plan focuses on six key objectives to meet these strategic goals:

1. Position brand story and tell Niagara Parks' stories
2. Enhance perceived value of guest experiences
3. Drive visitation to attractions
4. Increase revenue for revenue producing operations
5. Increase frequency of partner and stakeholder communications
6. Improve processes for consumer data collection and analysis

Tactics to Deliver on Objectives

1. Position brand story and tell Niagara Parks' stories



- Collaborate with Niagara Parks' departments to identify stories and initiatives that exemplify Niagara Parks' brand story
- Effectively communicate the breadth of unique, must-see experiences that Niagara Parks has to offer for visitors
- Build awareness for Niagara Parks operational structure and the connected relationship between its stewardship role and its tourism role (revenue-producing operations)

2. Enhance perceived value of guest experiences

- Identify and document opportunities to augment and improve the visitor experience at Niagara Parks core sites and attractions
- Prioritize tangible visitor experience improvements beginning with highest profile and most visited locations
- Develop and implement rich storytelling elements which deliver additional entertainment and educational value for guests
- Work to design and implement aesthetic upgrades to key visitor nodes and experiences

3. Drive visitation to attractions

- Leverage ongoing attention and excitement for Niagara Parks Power Station & Tunnel, updated Journey Behind the Falls and future flying theatre attraction to drive awareness for all Niagara Parks attractions
- Maximize value of internal video/photo production capacity to create industry leading promotional assets for use with owned channels, earned media efforts and paid initiatives
- Emphasize the value offered by Niagara Parks' bundled pass products and increase visibility for these products digitally and in-park
- Showcase the one-of-a-kind nature of natural wonders that can only be experienced at Niagara Parks

4. Increase revenue for revenue producing operations

- Focus paid promotional content on revenue-generating attractions
- Increase cross-promotional elements between Niagara Parks high-volume attractions and ancillary operations (retail and culinary)
- Target higher-yield visitors who are more likely to enjoy Niagara Parks' must-see guest experiences
- Target key US markets who have historically seen high visitation and are likely to have increased demand following the removal of border restrictions
- Encourage repeat visitation from regional markets by presenting experiences in new and unexpected ways
- Enhance and streamline opportunities while communicating incentives for guests to upgrade their pass products online and in-park

5. Increase frequency of partner and stakeholder communications

- Collaborate with internal staff to develop and maintain dedicated stakeholder lists for all relevant departments

- Continue with the consolidation of multiple existing stakeholder lists into one segmented master file
- Strengthen key stakeholder relationships by increasing the frequency of email communications and aligning content to strategic organizational goals
- Identify opportunities to expand scope and scale of collaborative partnerships, focusing on Destination Ontario and Destination Canada

6. Improve processes for consumer data collection and analysis

- Audit and revise existing pass purchasers survey to enhance the collection of actionable data points related to visitor experience and perceived value
- Implement additional touchpoints for the consistent collection of pass purchaser data
- Expand scope of public engagement activities, supported through online surveys and engaging, regularly updated web content
- Introduce processes that facilitate more consistent analysis of data collected by the Niagara Parks Guest Services Centre
- Develop processes for the regular review of collected data and the implementation of decisions based on this information

Implementation Plan

The tactics outlined in this document are currently at various stages of implementation and will be continue to be adjusted and actioned throughout the duration of the 2024-27 timeline.

Key Principles for Implementation

Adaptability

- Changes to consumer behaviour, travel and tourism trends along with broader economic/political developments will introduce new obstacles and opportunities that do not currently exist, demanding a flexible and dynamic approach to implementation.

Continuous monitoring

- A focus on digital marketing campaigns facilitates opportunities for extensive data collection and analysis on the performance of various communications and marketing initiatives. Using industry leading tools, including AI assisted software solutions tactics will be consistently evaluated for performance and ROI.

Resource allocation

- Consistent with the overall strategy of driving visitation and revenues to Niagara Parks attractions, paid marketing investments will prioritize building awareness and demand for Niagara Parks bundled pass products (Adventure Pass and Wonder Pass) through trackable, high ROI digital channels in combination with sponsored content in impactful media outlets.



- Due to the highly seasonal nature of Niagara Parks revenues, and the importance of the summer season, the spring and early summer periods will see the largest investments from a paid promotional perspective.

Strategic alignment

- Niagara Parks marketing and communications efforts will continue to be designed and implemented following the priorities and structures of Niagara Parks 10-Year Strategic Plan and annual Business Plans while ensuring alignment with the most recent Minister's Letter of Direction.