



The Niagara Parks Commission

Business Plan 2025-2028

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1.0 Executive Summary

The Niagara Parks Commission is a board-governed operational enterprise agency of the Ontario Ministry of Tourism, Culture and Gaming, 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 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 and providing spectacular guest experiences that grow tourism to Niagara and the province. These two components of Niagara Parks' mandate are intrinsically linked. The revenues generated at Niagara Parks' 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 work.

In order to grow visitation and revenue generation, particularly within a saturated and competitive tourism marketplace, Niagara Parks has been prioritizing investments to improve its guest experiences. The ability to capture the attention of prospective travellers in the post-COVID-19 era has become essential. Niagara Parks accomplishes this by continuously refreshing its guest experiences, from the recent \$22 million redevelopment of its flagship tourism facility Table Rock Centre to the opening of the Niagara Parks Power Station in 2021-22. In 2025-28, Niagara Parks has many more updates planned including the launch of a brand-new attraction at Table Rock Centre and upcoming private sector redevelopment of the historic Toronto Power Generating Station.

Niagara Parks entered the 2024 tourism season in the afterglow of the total solar eclipse, the celestial phenomenon that placed Niagara Falls and Niagara Parks at the centre of the path of totality in early 2024. Niagara Falls and Niagara Parks received substantial media attention through the first few months of 2024 beginning with a National Geographic article that touted Niagara Falls as one of the top viewing locations in the world for the total solar eclipse.

Niagara Parks leveraged the opportunity to host a variety of free programming for the public including a partnership with NASA and the Canadian Space Agency (CSA) to host speaker events including with Canadian astronaut Jeremy Hansen. Significant increases in revenues across its operations were realized in the days leading up to the eclipse, as well as unprecedented global media exposure. The solar eclipse represented the launch of an exceptional tourism season for Niagara Parks in 2024-25.



Beyond the solar eclipse, a number of new additions and experiences were introduced in 2024-25 that helped position Niagara Parks as a top travel destination for prospective travellers. At the Niagara Parks Power Station, a new bilingual audio tour was launched with fascinating historical narratives from former employees, technical details and captivating stories about the evolution of the historic power station. New interactive exhibits were added in the Generator Hall such as the suspended Tesla Coil installation that features hourly demonstrations, and a refreshed nighttime experience that now includes access to the Tunnel attraction complete with all-new LED lighting. The new additions at the power station were a focus of Niagara Parks' marketing efforts and media campaigns for the year. Since opening in 2021, the Niagara Parks Power Station is now Niagara Parks' top attraction behind Journey Behind the Falls. Additionally, Niagara Parks was able to fully pay back the \$25 million loan to the Ontario Financing Authority that supported the redevelopment of the new attraction ahead of schedule.

In 2024-25, Niagara Parks was able to further build on the successful results achieved during the 2023-24 fiscal year, achieving increases in visitation across virtually all of its operations. Comparing the tourism season (April to August) of 2024 to 2023, Niagara Parks saw an increase of 13% in overall revenues across its revenue generating operations.

For 2025-28, Niagara Parks has even more exciting developments on the horizon, starting with a brand-new flying ride attraction that will open at Table Rock Centre in 2025. The new flying theatre will be a key focus of Niagara Parks' Sales and Marketing teams, including the delivery of an impactful launch campaign in the summer of 2025. In 2025, Niagara Parks will also be collaborating with the Tesla Museum in Belgrade, Serbia, to introduce a new temporary exhibit at the Niagara Parks Power Station about Nikola Tesla. Also during this time, construction will take place for the over \$200 million private sector redevelopment of the Toronto Power Generating Station to transform it into a brand-new world-class experience including Niagara Falls' first and only five-star boutique hotel.

In consideration of these new experiences and trends in visitation including the return of the US market which now represents 44% of total spending, Niagara Parks is projecting continued growth across its revenue-generating operations for 2025-26. With an increase in visitation also comes an increased demand on services, particularly within the core of Queen Victoria Park, which has been reflected in the organization's operating budget for 2025-26.

Beyond new guest experiences and expanding service levels, Niagara Parks will also be undertaking significant repairs and maintenance across its properties, including paving work along the north, central and south Niagara Parkway. Substantial planning is required to proactively manage its public spaces within Queen Victoria Park, a majority of which will take place over this business planning cycle.



After conserving its finances significantly during the COVID-19 pandemic, Niagara Parks has been steadily increasing its investments back into its properties through its capital budget. In 2024-25, Niagara Parks implemented a \$69 million capital budget, which included \$32.7 million toward deferred maintenance and \$36.3 million toward investments in strategic projects to grow the business. A balanced ratio of investments into repairs and maintenance across its properties and improvements to its guest experiences will allow Niagara Parks to remain sustainable both from a financial and asset management perspective. For 2025-26, Niagara Parks will be implementing a capital budget of \$51 million with \$31.9 million allocated for deferred maintenance and \$19 million for strategic projects.

Niagara Parks will also be facilitating largescale private sector projects throughout this business planning cycle. The project to redevelop the historic Toronto Power Generating Station has been pacing well with all requirements of the due diligence phase completed in the fall of 2024, as well as final approval from the Government of Ontario. Construction planning will begin in the fall of 2024 with substantial work to take place over the next three years to prepare for a grand-opening in 2027-28. Niagara Parks is also committed to exploring the potential of the Ontario Power Generating Station within the Niagara Gorge, as well as a potential new Visitor Transportation System to connect guest experiences within Queen Victoria Park while alleviating pressure on the Niagara Parkway.

In addition to expanding upon budget planning for the organization and the above-noted projects and initiatives, the contents of this Business Plan aim to show how Niagara Parks is delivering on its mandate, the themes of its 10-year Strategic Plan and the priorities set out in Minister Cho's Letter of Direction over the next three years.

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 2024-28 Statement of Operations

Table 1.1 2025 - 2028 STATEMENT OF OPERATIONS (thousands of \$'s)						
	CURRENT FISCAL YEAR			FUTURE YEARS		
	BUDGET	PROJECTED	VARIANCE TO BUDGET	BUDGET		
	Apr. 2024 Mar.2025	Apr. 2024 Mar.2025	Apr. 2024 Mar.2025	Apr. 2025 Mar.2026	Apr. 2026 Mar.2027	Apr. 2027 Mar.2028
Total Revenue	\$162,265	\$183,432	\$21,167	\$193,873	\$204,974	\$215,692
Total Expenses	\$120,177	\$128,400	\$8,223	\$141,508	\$148,415	\$155,949
Net Surplus Before Interest & Depreciation	\$42,088	\$55,032	\$12,944	\$52,365	\$56,559	\$59,743
Loan Interest	\$1,387	\$1,675	\$288	\$377	\$234	\$79
Depreciation & Deferred Stimulus Funding	\$16,059	\$16,883	\$824	\$19,564	\$21,953	\$26,290
Net increase (Decrease) in Power Plant Obligation	\$1,300	\$1,300	\$0	\$600	\$600	\$600
Annual Net Surplus (Deficit)	\$23,342	\$35,174	\$11,832	\$31,824	\$33,772	\$32,774



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 Gaming. 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 Gaming, Niagara Parks directly supports the Ministry's mission of improving the quality of life and promoting economic growth by supporting and delivering exceptional tourism and cultural experiences.

In Minister Cho's Letter of Direction for Niagara Parks, a series of government-wide commitments for board-governed provincial agencies were outlined to guide operations for 2025-26. Additionally, Minister Cho identifies five 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.

Innovative

- Simplify client/customer interactions
- Expand and optimize digital service offerings
- Improve Client/ customer satisfaction
- Share data with Supply Ontario, when requested, regarding procurement spending and planning, contract arrangements and vendor relations to support data-driven decision-making.

Niagara Parks consistently assesses client customer interactions across its digital platforms, including its consumer website and social media channels, as well as in-person interactions across its revenue-generating operations. Niagara Parks' digital Guest Services Centre has introduced a new programmed ChatBot function on its consumer website to help simplify interactions with guests who have questions about Niagara Parks. The ChatBot is programmed with information from Niagara Parks' comprehensive FAQ sections on its website and is regularly updated to ensure it is functioning as efficiently as possible. The program also helps to divert common queries away from less efficient reporting channels, optimizing organizational capacity and directing Guest Services resources to priority areas. Niagara Parks will ensure the use of the ChatBot function is in compliance with directives from the Province around the use of AI tools.

To accompany the new ChatBot function, Niagara Parks' Guest Services Centre team has also introduced an improved satisfaction survey for guests who engage Guest Services, either through email or the new ChatBot, in order to better understand guests' experience and improve customer satisfaction. Additionally, a new digital platform to consolidate, track, and analyze incoming feedback will allow Guest Services to develop and report on outcome focused performance measures, identify opportunities for improving response times, and improve customer satisfaction. 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 across Niagara Parks.



Additionally, Niagara Parks has also introduced a digital ticketing system for its WEGO buses, which allows guests to scan their tickets directly from their smartphone rather than requiring a separate ticket. This will serve to simplify the ticketing process providing improved convenience and efficiency for guests and WEGO drivers. The new system also allows for greater data collection to support future decision-making.

Niagara Parks will be completing a pilot program for the addition of digital kiosks at its quick-serve culinary outlet at Table Rock Centre this year. In addition to providing convenience for guests, digital kiosks have been proven to increase the average cheque balance while also offering potential cost-savings due to reductions in labour costs, which is an important consideration given the labour shortages within the hospitality and tourism sector that Niagara Parks has been challenged with in the last few years. If successful, Niagara Parks will explore adding digital kiosks at more quick serve outlets across its operations.

Niagara Parks will also be developing a new consumer website over the course of this business planning cycle. 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

Throughout 2025-28, Niagara Parks will also be continuing with its project to improve cellular connectivity across its properties, working with a third-party operator to install new cellular infrastructure in approved locations. As well, through its IT team, Niagara Parks has plans to enhance outdoor WiFi for guests and stakeholders within the core tourism area of Queen Victoria Park from the Floral Showhouse to Oakes Garden Theatre. This small geographic area receives a high volume of guests particularly during the summer tourism season. To improve internet connectivity, the team will be installing new infrastructure and access points throughout the area.

Niagara Parks is also improving visitor data collection and analysis across its operations heading into 2025. This includes the addition of a full-time Research Analyst position in October 2024, ongoing efforts to improve guest surveys, and the creation of a first-ever 'Consumer Profile' based on visitation patterns in Niagara Parks relative to broader domestic and international trends. These initiatives will help to support data-driven decision making at Niagara Parks. In 2025, this research will be used to develop strategies for improving visitation, spending, and customer satisfaction across key market segments, as well as for growing visitation during shoulder seasons.

Sustainable

- Strengthen public service delivery by optimizing organizational capacity and directing existing resources to priority areas
- Use Public Resources efficiently and

- Operate within agency's financial allocations
 - Prudently and responsibly manage workforce size.
 - Where an agency requires a material increase in workforce size, the agency must provide the Minister with an HR plan for approval that provides the rationale based on government priorities and/or agency mandate

Niagara Parks has a robust 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. As a self-funded organization, Niagara Parks generates its own revenues which are then invested back into funding its operations, including its environmental and cultural stewardship work. Since 1885, Niagara Parks has been expected to operate without the use of taxpayer funding to manage its properties and guest experiences. While the organization received stabilization funding during the pandemic, Niagara Parks has recovered well and is once again in a position to invest in its properties through a healthy capital budget. Niagara Parks' capital and operating budget are expanded upon within this Business Plan.

For the 2025-26 fiscal year, 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 normally has significant fluctuations in its seasonal and student complement throughout the fiscal year as a result of the seasonality of its operations.

With the opening of a new attraction in 2025 and planned improvements to existing attractions and experiences, there is an expectation of increased staffing requirements, particularly when turnover is factored in. Niagara Parks has experienced significant turnover for the fiscal 2024-25 season of 30%, excluding normal attrition, which mainly impacted the culinary and custodial services departments. As Niagara Parks experiences increases in visitation and revenue, the high turnover in our culinary and custodial departments continues to have implications on staffing operations. Niagara Parks will comply with all reporting requirements including providing the Minister with an HR plan that tracks rationale against government priorities and Niagara Parks' mandate.

Accountable

- Develop and report on outcome-focused performance measures to effectively monitor and measure performance
- Protect individual, business or organization data by actively managing data and cybersecurity and reporting Artificial Intelligence uses
- Report all high risks including effective mitigation plans
- Align hybrid work policies with the OPS and identify and assess office optimization opportunities to reduce office realty footprint and find cost reductions
- Collaborate with MOI to identify office space opportunities
- Align with the MBC Realty Directive and the OPS Modern Office Space (OMOS) Standards.
- Develop and encourage diversity and inclusion initiatives by promoting an equitable, inclusive, accessible, anti-racist and diverse workplace



Niagara Parks regularly tracks and reports on outcome-based performance measures across the organization categorized within the five strategic goals:

- Developing and Nurturing Great Guest Experiences
- Growing Revenue
- Expanding Digital Service Delivery
- Fostering strong collaboration with partner organizations
- Ensuring strong fiscal management

These strategic goals align with the priorities within the Minister's Letter of Direction and provide a roadmap to assist Niagara Parks in delivering on its historic mandate of preserving and promoting the environmental and cultural heritage of the Niagara River corridor while maintaining financial self-sufficiency. These performance measures are further expanded upon in the Performance Measures section of this Business Plan.

Niagara Parks collects a wide variety of data sets across multiple business units and sectors. For each data set, Niagara Parks staff abide by all relevant legislation and guidelines to ensure it is managed safely and used responsibly. This process will be further streamlined in the next three years as Niagara Parks expands its capacity for internal research and data analysis through the hiring of a full-time Research Analyst position in October 2024.

Niagara Parks has recently developed a Cybersecurity Report for the organization that provides an overview of the current cybersecurity landscape and highlights Niagara Parks' progress in safeguarding our cybersecurity posture including security performance milestones, notable successes and recommendations for maintaining a secure environment.

In 2024, Niagara Parks established internal guidelines regarding the use of Generative Artificial Intelligence (Gen AI). These internal guidelines reflect established best practices and provincial guidelines and support the protection of individual, business, and organization data by reporting Artificial Intelligence uses and actively managing data and cybersecurity. In 2025-28, Niagara Parks will continue to explore opportunities for the further use and integration of artificial intelligence across Niagara Parks, in order to optimize organizational capacity, support data-driven decision making, and simplify client/customer interactions by improving the accessibility of key services and attractions, in accordance with directives from the Province.

Niagara Parks completes regular risk assessments including mitigation plans and target dates that are provided quarterly to the Ministry. Additionally, as a requirement under the Agencies and Appointments Directive, Niagara Parks reports on its risk charter within its annual report and three-year business plan.

Niagara Parks is consistently looking for operational efficiencies, including the consolidation of staff into shared office spaces, both to improve efficiency and convenience but also to allow future opportunities for adaptive reuse of other buildings. In the previous fiscal year, Niagara Parks expanded its WEGO bus garage to accommodate its fleet vehicle garage in one consolidated space. This allowed for the sharing of equipment and labour to provide operational efficiencies and cost savings for the organization. The vacated vehicle garage space was repurposed as administrative



office space to bring together essential services within the Maintenance Centre building site, including Niagara Parks' Data Centre which was moved from Oak Hall in 2024.

For 2025, Niagara Parks will continue to consolidate production services for its horticultural team at the Butterfly Conservatory location. Previously, production was split between the Butterfly Conservatory/Botanical Gardens and the Niagara Parks Floral Showhouse. With improvements recently made to expand the Butterfly Conservatory location, the majority of production now takes place at the newer facility, improving the operational efficiency of the horticultural team and output of crop production.

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.

In addition to the government-wide priorities identified for board-governed provincial agencies, the Minister's Letter of Direction outlined the following priorities that are specific to the Niagara Parks Commission:

- **Continue to 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.**

Niagara Parks will continue to explore the redevelopment of its marina property along the south Niagara Parkway in Fort Erie. Our vision is to establish a world-class recreational waterfront destination to grow tourism to the area and stimulate the local economy, providing benefits for Niagara Parks, the Town of Fort Erie and the entire Niagara region.

- **Continue to work collaboratively with the ministry to redevelop the Toronto Power Generating Station and the Ontario Power Generating Station, and bring forward a proposal for the electric tram, while seeking related approvals as needed**

Niagara Parks worked closely with colleagues at the Ministry of Tourism, Culture and Gaming to provide all of the information required as part of the approval process for the redevelopment of the Toronto Power Generating Station. Niagara Parks was proud to receive official approval by the Government of Ontario for the lease agreement that will establish the public-private partnership between Niagara Parks and Toronto Power Hotel Inc., the company that will be transforming the site. Niagara Parks will continue to work closely with the Ministry, Minister's Office and the Government of Ontario as this transformational project progresses.

Niagara Parks will be collaborating with the Ministry on next steps for the Ontario Power Generating Station with a vision of establishing it as another world-class new visitor experience in Niagara Falls. Similarly, the Visitor Transportation System or electric tram is another significant private sector opportunity that will further enhance the potential of Niagara to serve as an economic driver for the



province and grow as a top-tier international tourist destination. Niagara Parks will continue to engage with Indigenous communities regarding these major development projects.

- **Support and align with 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 2025-2028 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.

Niagara Parks offers world-class visitor experiences, and will be expanding these experiences over the course of the next three years, including with:

- New Flying Theatre attraction to open at Table Rock Centre in 2025
- Significant upgrades at Journey Behind the Falls and many other Niagara Parks attractions
- Redevelopment of Toronto Power Generating Station: Five-star boutique accommodation, fine dining, indoor and outdoor public viewing areas, art gallery, theatre, event spaces, etc.
- Redevelopment of Ontario Power Generating Station;
- New visitor transportation / electric tram system.

For the Toronto Power redevelopment project, in addition to elevating the entire destination of Niagara Falls and aligning with the government's destination Niagara strategy, the economic impact to Niagara and Ontario for the first nine years (four years of construction and five first years of operation) are estimated as the following:

- 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

The \$200 million redevelopment of Toronto Power, along with the other world-class guest experiences provided by Niagara Parks will support the establishment of a new tourism market to Niagara Falls, in alignment with the government's priorities of tourism growth in the area.

- **Continue to engage with Indigenous communities in delivering The Niagara Parks Commission's mandate, including major development projects, and consulting with any such communities where required.**



Niagara Parks will continue to collaborate and partner with Indigenous communities on a regular basis, both to deliver programming and to ensure adequate consultation on major development projects.

Niagara Parks has built positive relationships with many Indigenous groups and are continuing to grow these relationships including through the work of our Senior Advisor, Tim Johnson, a prominent member of the Indigenous community, and partnerships with many other Indigenous communities and community members.

Examples of current collaborations include:

- Landscape of Nations Memorial dedicated to honouring the contributions of Indigenous allies during the War of 1812;
- Valour and Victory: Honouring Indigenous Veterans – annual ceremony held at the Landscape of Nations Memorial to honour the contributions of Indigenous veterans.
- Explore the Niagara collaborative initiative that explores themes of Indigenous history and provides ideas for trip planning;
- New guided tour products that explore connections to Indigenous history and culture across Niagara Parks sites;
- Audio Tour at the Niagara Glen – Rekindling All Our Relations, curated by prominent Indigenous community member, Michele-Elise Burnett;
- New visitor gallery at flagship Journey Behind the Falls includes an area dedicated to Indigenous history, featuring a reproduction of a painting by Indigenous artist Oren Lyons (Joagquicho), called Maid of the Mist and the Thunder Beings;
- Interpretive content across Niagara Parks: pathways throughout Queen Victoria Park, Niagara Parks Power Station, Old Fort Erie, Laura Secord Homestead.

New for 2025-28:

- For the new flying theatre attraction, Niagara Parks has established an Indigenous advisory panel to inform the development of the creative and programming elements of the new attraction, including both the film production itself and accompanying pre-show areas.
- Both the development of the Children's Garden and the recreational Skating Loop will include Indigenous perspectives.
- Niagara Parks will continue to engage with Indigenous partners to inform the development of interpretive content across its properties including:
- New interpretive content at White Water Walk;
- New interpretive content to support the viewing platform at the Chippawa Grasslands.
- **Continue to 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, 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 increases ridership on GO Transit and brings more guests from the GTA to Niagara to experience all that this region has to offer.

Niagara Park will continue to operate its retail store at the Fallsview Casino to connect guests to high-quality Niagara Falls and Niagara Parks-themed merchandise, as well as attraction tickets and packages for Niagara Parks experiences.

Niagara Parks is also prioritizing increasing collaborative tourism partnerships across the region, including with the Tourism Partnership of Niagara, to share resources and insights with the goal of enhancing Niagara's tourism data. Established partnerships with brand-aligned organizations like the Niagara Grape and Wine Festival and Niagara Jazz Festival will continue to leverage Niagara Parks venues and resources to provide spectacular event experiences, such as the Cool As Ice Icewine Gala.

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. Through Niagara Parks' paid attractions and free services, guests are able to authentically experience the natural wonder of the Falls and the Niagara River from all perspectives.

It is often said that Niagara Parks is blessed by geography, as the steward of one of the world's most iconic and beloved natural wonders, Niagara Falls. While Niagara Falls has been a tourism icon for over two centuries, in order to grow new and particularly repeat visitation, Niagara Parks needs to offer new reasons to visit. At the same time, Niagara Parks needs to ensure that it is providing an exceptional guest experience from start to finish, from the meticulous horticultural treatments across the Park to the availability of clean public washroom facilities.

During the 2025-28 business planning cycle, Niagara Parks will open a brand-new attraction, a cutting-edge flying theatre ride to replace its former 4D attraction, Niagara's Fury at Table Rock Centre. The flying theatre ride will allow guests to take flight as they soar over awe-inspiring landscapes throughout Niagara Parks, including jaw-dropping perspectives of the iconic Horseshoe Falls. While the attraction is a natural fit for Niagara Falls given its world-renowned environmental features, the concept of a flying theatre ride will be a new venture for Niagara Parks and something that differs from its other nature-based attractions.

Niagara Parks' sales and marketing efforts will be focused on promoting the new attraction to ensure a successful launch in the summer of 2025.

In addition to opening a new attraction and other guest experiences in 2025-28, Niagara Parks' operating budget reflects increases across various departments to ensure service levels are reflecting the growth in visitation, particularly to the core of Queen Victoria Park. As a result, Niagara Parks will be expanding capacity within its custodial team, waste and recycling services, parks and horticultural operations, and the Niagara Parks Police Service, which are all important components of providing a spectacular experience from the moment a guest arrives to Niagara Parks.

Strategic Goal #2: Growing Revenue

As a self-funded organization largely dependent on variable revenue, Niagara Parks is constantly exploring new opportunities to diversify its revenue stream. The majority of Niagara Parks' revenue is generated from its attractions and other revenue-producing operations, largely during the summer months, which can make the organization vulnerable to global trends that impact tourism activity. 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.

Over the past two tourism seasons, which have seen a resurgence of tourism demand, many of Niagara Parks' operations in the core of Queen Victoria Park have been at peak capacity during the summer months. As the organization continues to plan for the best way to manage high volumes of guests to its sites, there are major opportunities to grow revenue by expanding business and tourism



activity into the slower, shoulder seasons. Niagara Parks will be focused on providing exceptional year-round guest experiences and reasons to visit the destination in the off-season. Examples include the creation of a new skating loop at the Floral Showhouse, the annual Winter Festival of Lights and investing in enhancements to improve the off-season experience at year-round attractions such as Journey Behind the Falls and the Niagara Parks Power Station.

Strategic Goal #3: Expanding our Digital Service Delivery

In alignment with priorities of the Ministry, throughout 2025-28 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.

Additionally, the launch of digital ticketing options on WEGO buses and the pilot program to introduce digital kiosks within Niagara Parks' quick serve culinary operations are examples of operational changes that will improve the guest experience while providing benefits to Niagara Parks.

Over this business cycle, the organization will also be exploring the use of Artificial Intelligence tools to enhance its digital service delivery, including through its Guest Services Centre to improve response times for incoming inquiries.

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. Niagara Parks will continue working closely with regional tourism organization, Tourism Partnership of Niagara, and destination marketing organization, Niagara Falls Tourism, to collaborate on initiatives that benefit the tourism industry in Niagara Falls. Additionally, Niagara Parks will continue to work with Metrolinx to increase ridership on the GO Train Service to Niagara and provide a seamless transit experience for all guests using the service.

The organization has also prioritized collaborating with brand-aligned organizations to host events on Niagara Parks property, which provides numerous benefits both from a cost and resource-sharing perspective, as well as the ability to provide increased value for guests. Over 2025-28, Niagara Parks will be expanding its partnerships with its local post-secondary institutions including Brock University, Niagara College and Niagara Falls University Canada. Further opportunities to explore



with these partnerships include improving the pipeline for potential employment with Niagara Parks, collaborating on student research projects and more.

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 the financial results from the past two tourism seasons have placed Niagara Parks in a stronger financial position, the organization 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. Throughout 2025-28, Niagara Parks will be implementing an audit of its retail operations to help identify efficiencies and cost-savings.

5.0 Environmental Scan

The 2024-2025 tourism season was a period of continued growth for Niagara Parks, driven by increases in visitation and spending from domestic travellers and the US market. Niagara Parks also saw growth from other international markets including the UK, France, and Germany.

Niagara Parks has continued to position the Niagara Parks Power Station, as well as investments in popular sites such as Table Rock Centre and Journey Behind the Falls, to drive visitation. This includes the creation of a new bilingual audio tour at the Niagara Parks Power Station and new interactive displays such as the Tesla coil installation, as well as programming that has expanded the evening guest experience. With drive-time markets in Canada and the US representing a majority of total spending at Niagara Parks, investments into Niagara Parks' attractions and guest experiences over the next three years will serve to leverage interest from these key markets to encourage both new and particularly repeat visitation.

Tourism Landscape

The past year has been one of uneasy growth for Canadian tourism. Through the first half of 2024, tourism GDP in Canada reached \$18.9 billion, up from \$18.1 billion over the same period in 2023.¹ Tourism revenue in Canada also surpassed pre-pandemic levels, reaching \$28.8 billion (CAD) in the second quarter of 2024. This growth has been driven by the recovery of domestic tourism revenues, which reached \$21.6 billion in the second quarter of 2024, or 123% of pre-pandemic levels.²

Overall visitation numbers have also continued to recover. Between January and August 2024, the number of non-resident visitors entering Canada reached 20.8 million, an 11.3% increase from the previous year.³ The number of non-residents entering Ontario increased 11.7%, as well, from 8.6 million in 2023 to 9.6 million in 2024. Of non-residents entering Canada, nearly four-fifths are residents of the United States.

The number of non-resident visitors entering Canada nevertheless remains below pre-pandemic levels. The number of overnight visitors to Canada between January and August was 11 % lower than in 2019, with international visitation (non-US) just 81.7% of what it was before the pandemic. In Ontario, the number of non-resident visitors reached 84% of 2019 levels, with visitation from Europe and Asia recovering more slowly than other markets.⁴

Visitation Patterns at Niagara Parks

Building off a stronger than anticipated year for tourism in 2023-24, Niagara Parks saw continued growth in spending and visitation in 2024. Through investments in new attractions, programming, and upgrades, particularly within the high-traffic area of Queen Victoria Park, Niagara Parks has leveraged interest particularly from the domestic and drive-time US markets, which combined

¹ Statistics Canada. Table 36-10-0234-02: Tourism gross domestic product, current prices (x 1,000,000).

² Destination Canada. (2024). "Quarterly Tourism Snapshot: Q2 2024."

³ Statistics Canada. Table 24-10-0053-01 International travellers entering or returning to Canada, by type of transportation and traveller type.

⁴ Statistics Canada. Table 24-10-0050-01 Non-resident visitors entering Canada, by country of residence.

accounted for 83% of its collections from April to September 2024. The US market officially outpaced the domestic market in 2024 with 44% of overall spending coming from American travellers compared to 40% from within Canada.

Within the domestic market, visitors from regional markets, specifically the Greater Toronto Area, comprised the bulk of visitation. For the US market, visitation from drive-time states including New York, Pennsylvania, New Jersey, and Ohio accounted for one-third of US spending. The United Kingdom, Germany, France, Italy, and Mexico remain key sources of non-domestic revenues, as well. Collectively, visitors from these countries accounted for 7.1% of total spending at Niagara Parks in 2024. Seasonal fluctuations at Niagara Parks were consistent with previous years, with peak visitation occurring during the summer months.

Economic Climate

Headline numbers for Canada's economy have been modest in 2024. Economists anticipate that Canada's real GDP growth will finish at 1.1% for the year, slightly lower than the expected pace of 1.8%.⁵ This mirrors slowing growth in the United States, and both Europe and the United Kingdom continue to recover slowly from the Covid-19 pandemic.

Consumer spending in Canada has also slowed throughout the year, and the country's labour market is cooling in ways that may mute wage growth in the year ahead.⁶ Though interest rate cuts have provided some relief, many Canadians continue to adjust their travel plans to cope with rising costs, including travelling closer to home, spending less on activities or attractions, and choosing less expensive accommodations.⁷ Intraregional travel continues to be a priority for Canadians and, when asked whether they are considering a trip to Niagara Falls, over one-third of Canadians (37%) answer affirmatively.⁸ One potential barrier is the ongoing lack of domestic air connectivity within Canada, which remains well below pre-pandemic levels.⁹

There are some signs that discretionary spending could increase in 2025.¹⁰ American consumers continue to rank international and domestic travel as their highest-priority area for discretionary spending, and middle-income consumers in the United States, as well as Europe, plan to splurge on discretionary items at a comparable rate to high-income consumers, including on things like travel and dining.¹¹ Canada is the most popular destination for travellers from the United States and is a top three destination for potential travellers in the United Kingdom, France, Germany, and Mexico.¹² Niagara Falls remains a favoured destination for those likely to visit Canada.

Spending patterns at Niagara Parks align with these trends, indicating that we are seen as a desirable and affordable travel destination particularly for the drive-time markets within Canada and

⁵ TD Economics. (2024). "Provincial Economic Forecast: Rate cuts heal with time."

⁶ Government of Ontario. (2024). "Building Ontario for You: 2024 Ontario Economic Outlook and Fiscal Review."

⁷ Leger. (2024). "Canadian Spring Travel Plans."

⁸ Destination Canada. (2024). "Quarterly Tourism Snapshot: Q2 2024."

⁹ Destination Canada. (2024). "Quarterly Tourism Snapshot: Q2 2024."

¹⁰ Deloitte. (2024). "Economic Outlook."

¹¹ McKinsey. (2024). "State of the Consumer 2024: What's Next?"

¹² Destination Canada. (2024). "Quarterly Tourism Snapshot: Q2 2024."



the United States. An additional consideration for the growth of the US market to Niagara Parks is the strength of the US dollar, which could be seen as increased motivation for American travellers to favour Canada for their travel plans. Customer spending patterns show that American travellers spent on average \$55 per day at Niagara Parks compared to \$32 spent per day by Canadian travellers.

These mixed signals have led economists to predict a moderate pace of growth for the Canadian economy in 2025.¹³ Optimism about the economy has increased in most key markets, including the United States, and consumers are expressing a paradoxical cautiousness towards spending and a willingness to splurge.¹⁴ This could be interpreted as a turn towards spending on fewer, but higher-quality items or experiences.

Broader geopolitical conflict is a source of uncertainty, however, and the impact of elections in Canada, Ontario, and the United States remain to be seen. Rising trade tensions between Canada and China, the potential for broad-based tariffs by the United States, and growing conflict between Canada and India all represent additional downside risks. Most analysts nevertheless agree that lower interest rates, easing inflation, and population growth will support the ongoing recovery of the Canadian tourism sector.

¹³ Deloitte. (2024). "Economic Outlook" ; TD Economics. (2024). "Provincial Economic Forecast: Rate cuts heal with time."

¹⁴ McKinsey. (2024). "An Update on US Consumer Sentiment."

6.0 Financial Budget

As Niagara Parks enters the 2025-28 business planning cycle, the organization concludes a strong tourism season in 2024-25, building on the success of the prior year. For the year ending March 31, 2025, Niagara Parks is projecting a \$55 million operating surplus and a net surplus of \$35 million when factoring in depreciation and interest, an increase of 17% when compared to the previous year. Contributing to this success is a projected \$145.9 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 \$183.4 million in revenue from all sources. This contribution is \$21 million higher than what was budgeted for 2024-25 and \$16 million higher than revenues achieved in 2023-24.

Niagara Parks began the 2025 fiscal year at the centre of a globally significant event that resulted in substantial economic impacts and unprecedented media coverage. The total solar eclipse took place on April 8, 2024, and Niagara Parks properties including the Falls themselves were considered to be in the path of totality, promising a spectacular viewing experience of one natural global phenomenon happening over another.

Visitation during the total solar eclipse brought in revenue growth across Niagara Parks' operations, including a 106% increase in retail purchases and a 145% increase in culinary transactions when compared to the same weekend of the prior year. Media coverage leading up to and in the few days following the eclipse resulted in an estimated \$5.3 billion in advertising value equivalency for Niagara Falls. Media coverage that specifically mentioned Niagara Parks was estimated to deliver over \$150 million in advertising value equivalency. This was an excellent way to kick-off the start of the 2024 tourism season which had record-setting revenue levels for Niagara Parks.

This success is also contributed in large part to the return of the US market, which accounted for 44% of Niagara Parks' collections. Additionally, improvements made to Niagara Parks' revenue-generating operations supported Niagara Parks' sales and marketing efforts, driving earned media coverage and interest from tour operators. At the Niagara Parks Power Station, new offerings included a bilingual audio tour, new interactive exhibits and an expanded nighttime experience. Overall sales at the attraction increased by 19% from April to August 2024 compared to the same time frame prior year, establishing the Niagara Parks Power Station as Niagara Parks' top attraction behind its flagship Journey Behind the Falls.

Niagara Parks' investments in improvements and new guest experiences help capture the attention of prospective travellers in a competitive tourism marketplace, which has become even more critical post-COVID-19. With 83% of its visitation coming from the domestic and US market, Niagara Parks' sales and marketing efforts are focused on targeting the drivetime markets, which also help contribute to revenue growth in the shoulder seasons as well.

Looking ahead to 2025-28, Niagara Parks will continue this effort by investing in a number of new experiences and upgrades at its revenue-generating operations, headlined by the launch of a brand-new attraction in 2025. Supported by a comprehensive sales and marketing plan, the new attraction is expected to bring in both new and repeat visitation to Niagara Parks, which will result in surplus benefits to its ancillary operations including culinary outlets, retail stores, parking and transportation, etc. Building off the success of the 2024-25 tourism season, Niagara Parks is projecting a



contribution of \$157 million from its revenue generating operations in 2025-26, representing 8% growth over prior year.

For attractions specifically, Niagara Parks is projecting 12% growth over prior year, reflecting anticipated increases in visitation, admission price increases and additional revenue from the new flying ride attraction. For its retail stores and transportation services, Niagara Parks is projecting 9% growth in contributions, anticipating similar growth in these ancillary operations with an increase in visitation. For culinary operations, a more modest growth target of 2% has been established given the tighter margins in the culinary industry compared to other sectors. For golf operations, a number of construction projects are planned in this business planning cycle therefore an anticipated growth target of 2% has been established.

Niagara Parks' operating budget supports the anticipated increases in visitation, from adding capacity within the custodial team to enhancing waste and recycling operations. Additionally, these visitation patterns are also reflected in the capital budget with the addition of a new public washroom facility and planning work to address traffic and circulation issues. Niagara Parks will be implementing a capital budget of \$51 million for 2025-26, with \$30 million allocated for deferred maintenance and \$21 million allocated toward strategic investments into its guest experiences. This helps Niagara Parks to proactively manage its estimated \$360 million in depreciable assets and target an estimated \$200 million worth of deferred maintenance projects.

Operating Budget

For 2025-26, Niagara Parks will be implementing an operating budget of \$141 million which includes budgets for each department that covers payroll, operating expenses, as well as any key operational projects to be undertaken in the year ahead.

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, new experiences and revenue-generating opportunities including the Flying Theatre, new Nikola Tesla exhibit at the Niagara Parks Power Station, new tennis and pickleball courts at Queenston Heights Park and more.

Additionally, there are third-party projects to be undertaken in 2025-28 including a proposed new Starbucks location operated by Niagara Adventure Excursions, expansion of guest washrooms at Niagara City Cruises and expansion of services by Digital Attractions. While these projects are budgeted for and funded by each respective third-party operator, resulting growth projections in visitation and revenue are considered by Niagara Parks in its planning.

Based on the favourable results of 2024-25 and anticipated growth in visitation particularly to the core of Queen Victoria Park, the 2025-26 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.



As seen over the past several years and particularly since the opening of the Niagara Parks Power Station, there has been an increase in visitation to the core of Queen Victoria Park. With the anticipated opening of the new flying theatre attraction at Table Rock Centre, Niagara Parks is expecting visitation levels to continue to grow. Growth in revenue and visitation also results in increased operational expenses so that Niagara Parks continues to meet the needs and expectations of its guests. The operating budget reflects the resulting increased demand on services within Queen Victoria Park, including additional capacity for custodial services and parks operations including waste and recycling. Niagara Parks is also increasing its staffing levels within the Niagara Parks Police Service, particularly among its Provincial Offence Officers. This additional capacity will help ensure Niagara Parks remains a safe and secure destination for all guests, while contributing to traffic control and improving circulation of guests.

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 2 – Niagara Parks 2025-28 Statement of Operations

In thousands of dollars	F 2023/24 ACT	F 2024/25 ACT/FCT	F 2025/26 BUDGET	F 2026/27 BUDGET	F 2027/28 BUDGET
Revenue Producing Operations					
Retail	\$ 32,446	\$ 36,498	\$ 39,924	\$ 41,920	\$ 44,016
Attractions	\$ 39,569	\$ 44,097	\$ 49,465	\$ 53,669	\$ 57,426
Parking & Transportation	\$ 24,051	\$ 26,476	\$ 28,162	\$ 29,570	\$ 30,752
Culinary	\$ 26,884	\$ 30,827	\$ 31,391	\$ 33,903	\$ 35,598
Golf Operations	\$ 7,297	\$ 8,001	\$ 8,161	\$ 8,243	\$ 8,326
Total Revenue Producing	\$ 130,246	\$ 145,900	\$ 157,103	\$ 167,305	\$ 176,118
Land Rent	\$ 8,645	\$ 8,773	\$ 8,965	\$ 9,189	\$ 9,419
Toronto Power	\$ -	\$ -	\$ -	\$ -	\$ 1,000
Boat Tour Revenue	\$ 18,168	\$ 19,196	\$ 19,413	\$ 19,899	\$ 20,396
Zip Line Revenue	\$ 3,046	\$ 3,095	\$ 3,325	\$ 3,425	\$ 3,510
Photo Capture	\$ 1,850	\$ 1,768	\$ 1,792	\$ 1,837	\$ 1,883
All Other Revenue	\$ 1,855	\$ 1,816	\$ 1,805	\$ 1,850	\$ 1,896
Interest Income	\$ 2,898	\$ 2,884	\$ 1,470	\$ 1,470	\$ 1,470
Total Other Revenue	\$ 36,463	\$ 37,532	\$ 36,770	\$ 37,669	\$ 39,574
TOTAL REVENUE	\$ 166,709	\$ 183,432	\$ 193,873	\$ 204,974	\$ 215,692
Operating Expenses					
Cost of Goods Sold	\$ 19,140	\$ 22,463	\$ 24,224	\$ 25,262	\$ 26,525
Operating Expenses - RPO	\$ 50,979	\$ 50,099	\$ 53,752	\$ 56,708	\$ 59,827
Strategic Plan	\$ 508	\$ 1,036	\$ 2,250	\$ 2,318	\$ 2,387
Parks, Environment & Culture	\$ 6,686	\$ 7,970	\$ 8,895	\$ 9,250	\$ 9,620
Engineering & Parks Operations	\$ 20,661	\$ 22,101	\$ 24,443	\$ 25,910	\$ 27,464
Police	\$ 4,178	\$ 4,695	\$ 5,533	\$ 5,809	\$ 6,100
Administration	\$ 7,278	\$ 8,823	\$ 10,143	\$ 10,549	\$ 10,971
Sales, Marketing & Visitor Experience	\$ 5,984	\$ 7,407	\$ 8,131	\$ 8,457	\$ 8,795
Insurance and Municipal Payments	\$ 3,730	\$ 3,806	\$ 4,138	\$ 4,153	\$ 4,260
TOTAL EXPENSES	\$ 119,144	\$ 128,400	\$ 141,508	\$ 148,415	\$ 155,949
EBID	\$ 47,565	\$ 55,032	\$ 52,365	\$ 56,559	\$ 59,743
Interest Expense	\$ 1,580	\$ 1,675	\$ 377	\$ 234	\$ 79
Depreciation/Deferred Expense	\$ 14,919	\$ 16,464	\$ 19,564	\$ 21,953	\$ 26,290
(Gain) Asset Disposals/Other	\$ (270)	\$ 420	\$ -	\$ -	\$ -
Power Plant Liability	\$ 956	\$ 1,300	\$ 600	\$ 600	\$ 600
All Other Expenses	\$ 17,185	\$ 19,859	\$ 20,541	\$ 22,787	\$ 26,969
Net Surplus/(Loss)	\$ 30,380	\$ 35,174	\$ 31,824	\$ 33,772	\$ 32,774
Capital Spending	\$ 19,484	\$ 69,000	\$ 51,000	\$ 55,000	\$ 60,000
Ending Cash Position	\$ 53,598	\$ 23,815	\$ 26,481	\$ 24,830	\$ 21,934



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. The process also uses condition assessment analysis to identify and determine life cycle methodologies for existing properties, as well as return on investment principles to maximize revenue potential.

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.

Niagara Parks aims to maintain a 40/60 ratio within its capital budget between investments into repairs and maintenance across its properties and improvements to its revenue-generating operations and guest experiences to grow the business.

Within deferred maintenance, there are allocated budgets for the following categories:

- Roads, Bridges, Paths and Sidewalks
- Equipment
- Fleet
- Information Technology
- Facility Repairs

For 2024-25, Niagara Parks established a capital budget of \$69 million (44% of its 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. Throughout the year, Niagara Parks was able to complete a number of important capital projects, including a significant amount of paving work across its properties and a majority of the construction to support the new flying theatre ride at Table Rock Centre. For 2025-26, Niagara Parks has proposed a capital budget of \$51 million with \$31.9 million allocated for deferred maintenance and \$19 million for strategic projects.

Some examples of deferred maintenance projects to be completed in 2025-26 include replacing the netting and installing a new building automation system at Niagara Parks' Butterfly Conservatory attraction. There will also be significant investment into paving work with projects planned for the north, south and central areas of Niagara Parks. There are upgrades planned along the Fort Erie



Breakwall and improvements planned for Queenston Heights Park to complement the new tennis and pickleball courts.

Beyond deferred maintenance, Niagara Parks undertakes strategic capital investments to ensure it is continuously investing in upgrades to both its front-facing attractions and supporting back-of-house operations with the overall goal of improving its guest experiences. For its revenue-generating operations in 2025-28, Niagara Parks will be significantly investing in improvements at its flagship attraction, Journey Behind the Falls. Journey Behind the Falls is Niagara Parks' top-revenue producing attraction, which welcomes nearly 900,000 guests each year. This work will include exploring an additional tunnel lookout point and plans to rebuild the lower observation deck with heating infrastructure that will improve the year-round experience at the attraction.

For 2026-27, Niagara Parks has proposed a capital budget of \$55 million with \$30.2 million toward deferred maintenance and \$24.7 million toward strategic projects. For 2027-28, Niagara Parks is proposing a capital budget of \$60 million with \$32.6 million into deferred maintenance and \$24.7 million into strategic projects. A breakdown of the strategic capital projects to be undertaken by Niagara Parks for 2025-28 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.

Asset Management Plan

Niagara Parks is responsible for an estimated \$360 million in depreciable assets. Niagara Parks uses an internal ranking system to identify critical, safety, asset integrity and strategic projects, measured against available funds. In 2025-28, the Province will be embarking on a new government-wide asset management program. While Niagara Parks awaits the roll-out of this new program, which will include site assessments and analysis of relevant documents such as site plans, drawings, heritage assessments, etc., the team is managing our assets within our own system, reviewing useful life and making recommendations for repairs and upgrades.

Debt Financing

Niagara Parks' outstanding long-term debt as of March 31, 2024, was \$30.4 million comprised of three loan payments for a total of annual principal and interest charges of \$5.8 million. Two debts will be retired in fiscal 2028. During the 2025 fiscal year, Niagara Parks was able to pay in full the outstanding loan to the Ontario Financing Authority for the adaptive reuse of the Niagara Parks Power Station in the amount of \$20 million, nine years ahead of schedule. Niagara Parks is expected to be debt free by fiscal 2028 when all loan agreements are completed.

Table 3 - Niagara Parks' 10-Year Capital Forecast

Niagara Parks Commission 10 YEAR CAPITAL FORECAST (THOUSANDS OF \$) - FINAL												
	2024-25 Original Budget	2024-25 Adjusted Budget	2025-26 BUDGET	2026-27 BUDGET	2027-28 BUDGET	2028-29 BUDGET	2029-30 BUDGET	2030-31 BUDGET	2031-32 BUDGET	2032-33 BUDGET	2033-34 BUDGET	2034-35 BUDGET
Capital Funding Forecast	69,000	69,000	51,000	55,000	60,000	65,000	66,000	67,000	68,000	69,000	70,000	71,000
DEFERRED & PREVENTATIVE MAINTENANCE												
A - Plated and Insured Vehicles/Fleet	2,245	2,245	1,411	1,500	1,600	1,700	1,800	1,900	2,000	2,100	2,200	2,300
B - Equipment	3,535	3,535	4,515	4,000	4,200	4,400	4,600	4,800	5,000	5,300	5,600	5,900
C - Facility Upgrades	11,605	13,203	6,823	11,049	12,500	12,301	14,100	13,600	12,852	13,601	14,401	13,301
D - Information Technology	1,840	1,890	1,491	1,600	1,700	1,800	2,000	2,200	2,400	2,600	2,900	3,200
E - Infrastructure				5,000	5,300	5,600	5,900	6,200	6,500	6,800	7,100	7,500
Fort Erie Break and Recreational Trail	600	600										
F - Roads, Bridges, Pathways & Sidewalks	12,015	13,222	16,730	6,601	6,800	8,300	9,100	9,000	7,900	6,700	5,400	5,900
G - Unallocated	1,500	4,160	1,000	500	500	500	500	500	500	500	500	500
Total Deferred and Preventative Maintenance	33,340	38,855	31,969	30,250	32,600	34,601	38,000	38,200	37,152	37,601	38,101	38,601
STRATEGIC INVESTMENTS												
Attraction/Culinary/Retail Renewals												
Fly Over Theater (Fury Replacement)	19,600	19,600	1,031							2,000	2,000	
Niagara Fury's Attraction/Retail/Washrooms Renewal	3,000	2,506										
Niagara Parks Power Station Attraction	2,480	2,459		750	750	750	2,750	2,750	750	750	2,750	2,750
Journey Behind the Falls Tunnel & Table Rock	500	500	2,250	6,000	9,000	8,000				6,749	5,000	3,000
Grandview Renewal			500	500	1,000	1,000	3,000	2,500	5,000	5,000	5,000	5,000
Aero Car Upgrades							1,000	7,000	12,000	5,000		
Golf Operations			250	2,000	2,000	2,000	2,000	-	-	-	-	-
White Water Walk			1,400				2,000	4,800	4,150			
Attraction Development/Renewals - General	1,060	750	2,000	1,000	500	1,000	2,500	2,100	2,700	3,400	7,649	18,149
Total Strategic Attraction Renewals	26,640	25,815	7,431	10,250	13,250	12,750	13,250	19,150	24,600	22,899	22,399	28,899
Queen Victoria Park												
Queen Victoria Park (Master Plan & Facility Renewal)			2,300	1,650	6,000	9,100	11,200	3,000	2,748			
Public Realm			3,500	5,000	2,200	1,699		2,600				
QVP Infrastructure Servicing												
Consolidation of Services			2,350									
Consolidation of Maintenance Centre/Fleet/WEGO Service	2,000	2,000										
IT Data Centre Move	1,000	1,000										
Staff Consolidation				1,000								
BFC Production Facility Expansion (Floral Showhouse)				500								
Events/Festivals/Displays			400	250	250	250	250	500	500	500	500	500
Horticulture Activations/Mosaic Culture Installations			350	500	500	500	500	750	750	750	750	750
Winter Festival of Lights		310		2,000	2,000							
Skating Loop												
Parks/Public Amenities & Services			1,000	500	500	500	500	500	750	750	750	750
Niagara Parks Marina	5,000											
Washrooms			400									
Queenston Heights Improvements	750	750		400								
Chippawa Grass Lands												
Transportation										5,000	6,000	
New Visitor Transportation System												
New Bus Technology (Hydrogen, Electric)												
Branding/Environmental			300	500	500	500	500	500	750	750	750	750
Brand Strategy and Wayfinding			500	500	500	500	500	500	750	750	750	750
Environmental (Waste & Recycling /Charging)	270	270										
Foundation Joint Initiatives			500	1,700	1,700	1,600	1,300	1,300				
Children's Garden						3,000						
Botanical Gardens/BFC Site Consolidation												
Total Strategic All Other	9,020	4,330	11,600	14,500	14,150	17,649	14,750	9,650	6,248	8,500	9,500	3,500
Total Strategic Investments	35,660	30,145	19,031	24,750	27,400	30,399	28,000	28,800	30,848	31,399	31,899	32,399
Capital Expenditure Actual/Forecast	69,000	69,000	51,000	55,000	60,000	65,000	66,000	67,000	68,000	69,000	70,000	71,000

7.0 Implementation Plan

The following section expands upon the key strategic projects that will be undertaken by Niagara Parks in this business planning cycle (2025-2028).

In addition to budgeting for its regular operations, Niagara Parks undertakes a capital budget that is split between investments into repairs and deferred maintenance and strategic investments to enhance guest experiences and grow the business. 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 Gaming. This balance within Niagara Parks' capital budget is critical for ensuring the organization is able to maintain its properties and infrastructure, while also providing new reasons to visit and grow revenue.

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 projects throughout 2025-28 that are outlined in the operational budgets and plans within its internal business units, which also include its environmental and cultural stewardship work. These are captured in the Overview of Current and Future Programs and Initiatives section.

Captured within Niagara Parks' capital budget, the following are the key strategic projects to be undertaken by Niagara Parks in 2025-28:

Improvements to Revenue Generating Operations

Replacement of Niagara's Fury with new Flying Theatre Attraction

Niagara Parks will be replacing its former Niagara's Fury attraction at Table Rock Centre with a brand-new flying ride that uses state-of-the-art drone technology to simulate the sensation of flying over iconic landmarks and stunning scenery, while providing both entertainment and educational value for guests of all ages.

In the summer of 2024, Niagara Parks completed renovations to the washrooms and ticketing area located on the top floor of Table Rock Centre to support the development of the new attraction that is set to open in the summer of 2025. As of September 3, 2024, Niagara Parks officially ceased operations of its Niagara's Fury attraction, a 4D attraction that opened in 2008 and has since reached the end of its lifecycle due to aging technology.

Niagara Parks' project team is working closely with Brogent Technologies to develop the attraction experience, including facilitating filming at key Niagara Parks locations. Over the remainder of fiscal 2025, construction and development of the new attraction will continue, along with preparation of sales and marketing materials to ensure a successful launch. The new flying ride will be a focal point of Niagara Parks' paid media initiatives and sales team efforts for the 2025-26 season. Further



details on the Flying Theatre attraction, including pricing considerations are captured in the Performance Measures section.

Additions to the guest experience at the Niagara Parks Power Station

Throughout 2025-2028, Niagara Parks will continue to invest in additions to its newest visitor experience, the Niagara Parks Power Station and Tunnel. Working in collaboration with partners at the Tesla Museum in Belgrade, Serbia, a new temporary exhibit will open in the spring of 2025. The exhibit will provide a more in-depth look at the life and works of Serbian inventor Nikola Tesla whose patents were used in the development of the Niagara Parks Power Station. The exhibit will be included with admission to the Niagara Parks Power Station and will also include a retail component. The exhibit will provide extra value for guests, while encouraging both new and repeat visitation to the attraction.

Niagara Parks will also be adding new infrastructure to heat the tunnel's observation platform which will improve the guest experience at the attraction during the winter months, aligning with the priority of driving visitation during the shoulder season.

Significant upgrades to the tunnels at Journey Behind the Falls

Niagara Parks will be undertaking significant upgrades to the tunnel experience and viewing platform 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, as well as rebuilding the lower observation deck to address aging infrastructure and allow for it to be heated during the winter months. Niagara Parks will be exploring the potential of adding a new viewing portal through restoring one of the original tunnels.

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. A new heated viewing platform will improve the year-round experience at the attraction, as well as new interpretation and exhibit material within the tunnel. This will significantly improve the guest experience at Journey Behind the Falls all year-round, but particularly during the traditional off-season. Growth in the off-season has been identified as a key opportunity for Niagara Parks moving forward, particularly for popular attractions like Journey Behind the Falls which operates nearly at capacity during the busy summer tourism season.

Renewal of Grand View Marketplace

Niagara Parks will be investing in improvements at its Grand View location, which supports the operations of both the Niagara City Cruises' boat tour and Niagara Adventure Excursions' Zipline to the Falls. At this high-traffic location, Niagara Parks also offers a retail store, quick serve culinary outlet and guest washrooms. Work will be undertaken to improve infrastructure and sightlines, as well as enhance horticultural treatments to provide a better sense of place. Niagara Parks' attractions partner Niagara Adventure Excursions will also be adding a new Starbucks location in



this area, which is expected to bring more visitation, particularly during the off-season. Niagara Parks has plans to rehabilitate the existing buildings and operate a new welcome centre at this location in the future.

Golf Operations

With the establishment of a new Commission committee focused on golf operations, Niagara Parks will be making significant investments to improve the playing experience at its championship golf courses Legends on the Niagara and Whirlpool Golf Course. Restorative work will continue at Whirlpool Golf Course to bring the course closer to the original design intent by legendary golf architect Stanley Thompson. In consultation with Niagara Parks' environmental stewardship team, the work includes some tree removal with associated replantation strategies. In addition to the restoration work, Niagara Parks will also be installing a new irrigation system.

At Legends, there will be significant investment to replace and upgrade the cart paths, as well as the addition of a new electric shuttle to improve access for guests between the parking lot and the pro shop. These improvements will help ensure Niagara Parks maintains its reputation as a world-class golf destination.

Improvements to infrastructure, amenities and interpretation at White Water Walk

Over the course of fiscal 2024-25, Niagara Parks completed improvements to the exterior of the building at its White Water Walk attraction. For the attraction itself, Niagara Parks will be replacing and updating its interpretive elements along the boardwalk in 2025-26. Other plans for improvements at the attraction include widening and improving code compliance of the boardwalk and restoring access to an additional lower viewing platform.

Attraction Development / Renewals – General

An additional amount will be set aside in Niagara Parks' capital budget to support attraction renewal across the organization and to support signage upgrades where feasible and as needed, including improvements to wayfinding and interpretive materials, retail upgrades, etc. For 2025-26, Niagara Parks has plans to upgrade the exhibit areas of its Butterfly Conservatory attraction. Mirroring the successful approach taken to update the visitor gallery at Journey Behind the Falls in 2023, Niagara Parks staff team will develop an interpretive plan for the under-utilized space within the lobby area. Content will provide accessible and educational content, delivered through engaging physical and digital installations. Additional upgrades will be made to update branding and signage elements throughout the site, increasing consistency and quality perceptions of the park for visitors.

Guest Experience and Infrastructure Enhancements

Queen Victoria Park

To support increased visitation to Queen Victoria Park, which is the core of Niagara Parks' lands that overlook Niagara Falls, work will be undertaken to improve circulation and traffic in the area, as informed by the Queen Victoria Park Master Plan (2018). With the addition of the Niagara Parks



Power Station + Tunnel, upcoming opening of a brand-new attraction at Table Rock Centre, and future redevelopment of the other remaining power stations, there is a need to proactively manage growth in visitation to a small geographic area. Traffic and congestion along the Niagara Parkway have become an increasing issue, causing both safety concerns and impacts to the overall guest experience in this area. These challenges are expected to increase with new experiences being added in the coming years. As such, Niagara Parks will be exploring ways to proactively manage tourism growth within Queen Victoria Park over this business planning cycle.

Some of this planning work will include assessing traffic and circulation patterns with the potential of lane reductions along the Niagara Parkway to safely accommodate more foot traffic. There will also be significant landscaping requirements, as well as changes to the orientation and parking for the Floral Showhouse with the addition of a new skating loop. To address aging infrastructure within this important location, Niagara Parks will also be installing a new watermain to service Queen Victoria Park over the next three years.

Included within the budget for Queen Victoria Park is an assessment of the future of Queen Victoria Place, an aging Niagara Parks' facility that requires substantial upgrades and investment. Queen Victoria Place currently offers a full-service restaurant and covered terrace on the top floor and a cafe and retail store on the main floor. The building also provides office space for Niagara Parks' culinary department.

Consolidation of Services

Consolidation of Maintenance Centre / Fleet / WEGO Services

To facilitate greater operational efficiencies and better use of existing space, Niagara Parks has expanded 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 vacated vehicle garage space will be repurposed as administrative office space to bring together essential services within the Maintenance Centre building site, including Niagara Parks' Data Centre which was moved from Oak Hall in 2024.

As announced in the summer of 2024, Niagara Parks will be operating an additional route of the WEGO Bus Service on a two-year trial period. Since the tourism bus service began in 2012, Niagara Parks has operated the WEGO Green Line, a route that travels along the Niagara Parkway, connecting Niagara Parks sites and attractions. As of September 3, 2024, Niagara Parks also operates the WEGO Blue Line, which travels outside of Niagara Parks property to connect to the major tourism areas of Niagara Falls. By taking over operation of the WEGO Blue Line, Niagara Parks ensures that guests to Niagara Falls continue to have access to an integrated transportation system in the destination.

Staff Consolidation / Butterfly Conservatory Production Facility Expansion

Niagara Parks is consistently looking for operational efficiencies, including the consolidation of staff into shared office spaces, both to improve efficiency and convenience but also to allow future opportunities for adaptive reuse of other buildings. The team will continue to consolidate production



services for its horticultural team at the Butterfly Conservatory location. Previously, production was split between the Butterfly Conservatory/Botanical Gardens and the Niagara Parks Floral Showhouse. With improvements recently made to expand the Butterfly Conservatory location, the majority of production now takes place at the newer facility. These changes have significantly improved the operational efficiency of crop production and will also support future changes at the Floral Showhouse, including a potential reorientation of the main entrance and retail store.

Events / Festivals / Displays

Niagara Parks will be increasing investment into its horticultural activations and landscaping across the Park to ensure its parks and garden spaces reflect the organization's reputation for horticultural excellence. It will also continue to explore the use of Mosaiculture displays. In 2024, Niagara Parks launched an exhibit at the Floral Showhouse, featuring large topiary-like living sculptures planted by the horticultural team. The exhibit was presented in collaboration with the Atlanta Botanical Gardens and Mosaicultures Internationales de Montreal and was a great success as visitation to the Floral Showhouse increased by 52% year-over-year (April to August).

Winter Festival of Lights

Niagara Parks will continue its investment within the destination-wide Winter Festival of Lights, a key driver for tourism during the first part of Niagara's traditional winter season. Following a five-year strategic plan, Niagara Parks will continue to source its own lighting displays and produce its own programming to allow for greater points of connection and alignment across Niagara Parks' entire winter programming and revenue generating nodes. Niagara Parks has expanded its storage and workspace facilities which has allowed the team to procure key displays and to undertake repairs in-house as needed. For 2024, new programming elements were added on weekend nights including free concerts within Queen Victoria Park. Niagara Parks will continue to explore opportunities to grow and improve the Winter Festival of Lights, including the activation of the new skating loop proposed for 2026.

Creation of a skating loop at the Floral Showhouse

Working with the Niagara Parks Foundation, Niagara Parks will be developing 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, the Niagara Parks Power Station and in the future, the redeveloped Toronto Power Generating Station. A federal grant from the Federal Economic Development Agency for Southern Ontario in the amount of \$100,000 through the Niagara Parks Foundation will fund the detailed engineering designs, to be completed in winter 2025. The new skating loop is planned for 2026-27.



Parks/Public Amenities & Services

Public Washrooms

Niagara Parks will continue to address our public washroom capacity within Queen Victoria Park as informed by a recent audit. As part of the redevelopment at Table Rock Centre, public washrooms were renovated and added at the site. Plans are also in place to install a new public washroom facility outside of the Niagara Parks Power Station, providing a needed amenity in this location particularly for those using the Falls Parking Lot. In the future, Niagara Parks will be looking at its capacity within the area of Grand View and Oakes Garden Theatre.

Upgrades at Queenston Heights Park

Niagara Parks is constructing four new tennis and pickleball courts at Queenston Heights Park. Tennis courts have existed in this location for over 100 years and had reached the end of their useful life. Work will include resurfacing of the new tennis and pickleball courts, as well as the addition of new perimeter fencing and a new accessible walkway connection to the parking lot and existing guest washrooms. Construction began in September 2024 with plans to open the courts in the spring of 2025. The courts will offer both private and public playtimes with associated fees along with equipment rentals. Niagara Parks will also be renovating the existing retail store at Queenston Heights to support the new courts.

Chippawa Grasslands

The Chippawa Battlefield is a National Historic site that was the scene of a significant battle during the War of 1812. Left fallow over the past several decades, the 50-ha (120 acre) property has been actively restored into grassland habitat since 2016 to support grassland dependent bird species, such as Bobolink and Eastern Meadowlark, both species at risk. Now that the site has established into one of the largest grassland habitats in Niagara, there is an opportunity to accommodate visitors to the site to learn about both the natural and cultural heritage of the Chippawa Battlefield.

The Chippawa Battlefield Viewing Platform project consists of the design and construction of a unique, AODA compliant, viewing platform overlooking the recently restored Chippawa Battlefield and South Plains grasslands. The new platform will provide opportunities to view birds and other wildlife, prescribed burns in progress and War of 1812 historical re-enactments from an elevated perspective. Additional natural and cultural heritage education through interpretive signage and new programming will also be offered. In consultation with Niagara Parks' Indigenous partners, the design of the viewing platform incorporates numerous Indigenous elements and symbolism. The design also includes native plants in a horticultural display to provide education on the plants found within the 50 hectare (120 acre grassland), which benefit other species such as pollinators.



Branding / Environmental

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 2025-2028 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.

Environmental Services

With the increased demands on services within Queen Victoria Park, additional investment will be made to support environmental services including waste and recycling. The team will look at expanding its program of diverting food waste at Niagara Parks' culinary locations. There are also plans to add new waste and recycling receptacles and increased service to ensure Niagara Parks' public spaces are clean and welcoming for all guests.

Foundation Joint Initiatives

Children's Garden

The Niagara Parks Foundation is proceeding with a capital campaign to develop a new Children's Garden on a two-acre site at the Niagara Parks Botanical Gardens. A first for the Niagara region, the Children's Garden will be designed specifically for kids and their families to explore, wander, climb, discover and play while fostering a greater connection to nature and inspiring a lifelong love of the outdoors.

Outdoor education has been proven to promote healthy outcomes in many areas of childhood development. With excessive screentime on the rise and more time spent indoors, hands-on experiences that connect kids with nature and our environment have become even more essential. Nature-based learning encourages curiosity, sharpens focus and attention, supports mental health and resiliency, promotes cognitive development and fosters social and emotional skills.

The new garden space will include a series of featured programmatic areas that depict various environmental features across the Niagara River corridor, bringing the world-renowned environment to life for children to experience in a safe and accessible way. The Niagara Parks Foundation will be raising funds to support the development of the new Children's Garden and the project will also receive funding from the Niagara Parks Commission.

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 Toronto Power and potential future redevelopment of 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 the initial announcement in the fall of 2023 that Niagara Parks had signed a Letter of Intent with Pearle Hospitality, the winning proponent, Niagara Parks signed the lease agreement with Toronto Power Hotel Inc. in the fall of 2024. The redevelopment project also received approval from the Government of Ontario in the fall of 2024. The three-year construction period is now underway with plans to open in 2028.

This is an entirely private sector investment of over \$200 million to restore and redevelop Toronto Power to transform it into a brand-new, world-class visitor experience in Niagara Falls. As outlined in the lease agreement, Toronto Power Hotel Inc. will become Niagara Parks' newest tenant and will be responsible for base and variable rent payments to Niagara Parks.

For Ontario Power, Niagara Parks remains committed to exploring options for its redevelopment that are suited to the site's unique geography.

Visitor Transportation System

In alignment with planning to proactively manage the growth in visitation Niagara Parks has experienced within Queen Victoria Park, 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 area. 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.

8.0 Overview of Current and Future Programs and Activities

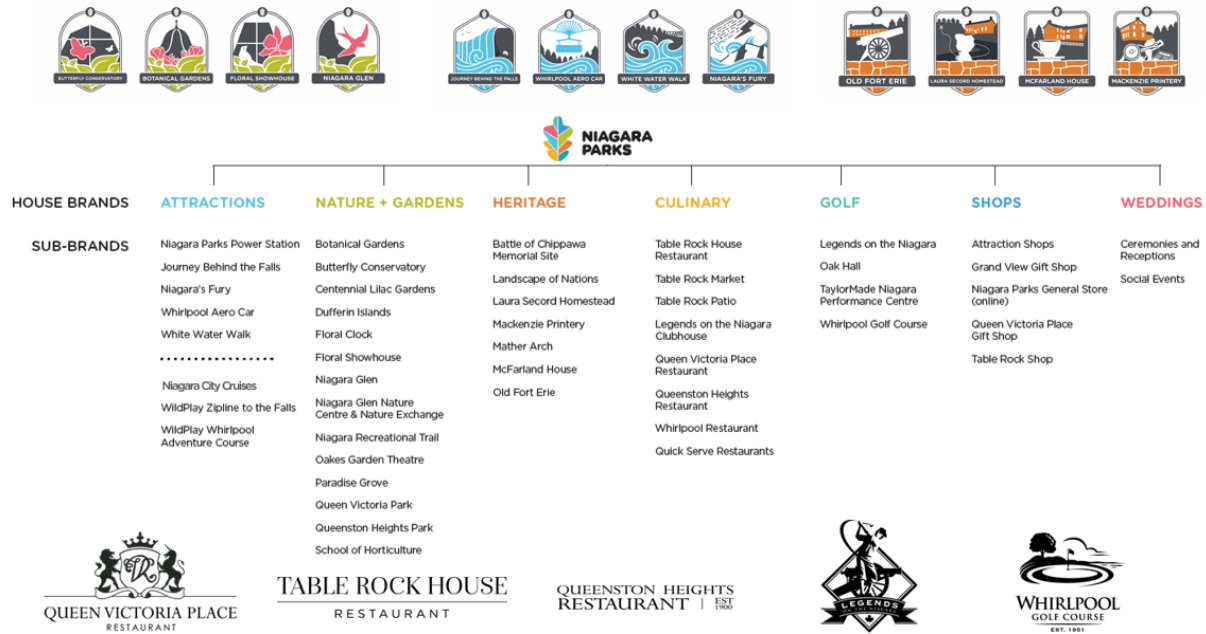
Since its inception in 1885, Niagara Parks has operated under a balanced mandate of preserving and promoting the environmental and cultural heritage of the Niagara River corridor, while remaining financially self-sufficient. Niagara Parks fulfills this self-funding principle by generating revenue from 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 1,800 employees, split between full-time, seasonal, part-time and student employees.

Table 4 – Niagara Parks Brand Umbrella showing both paid and unpaid services provided to the public



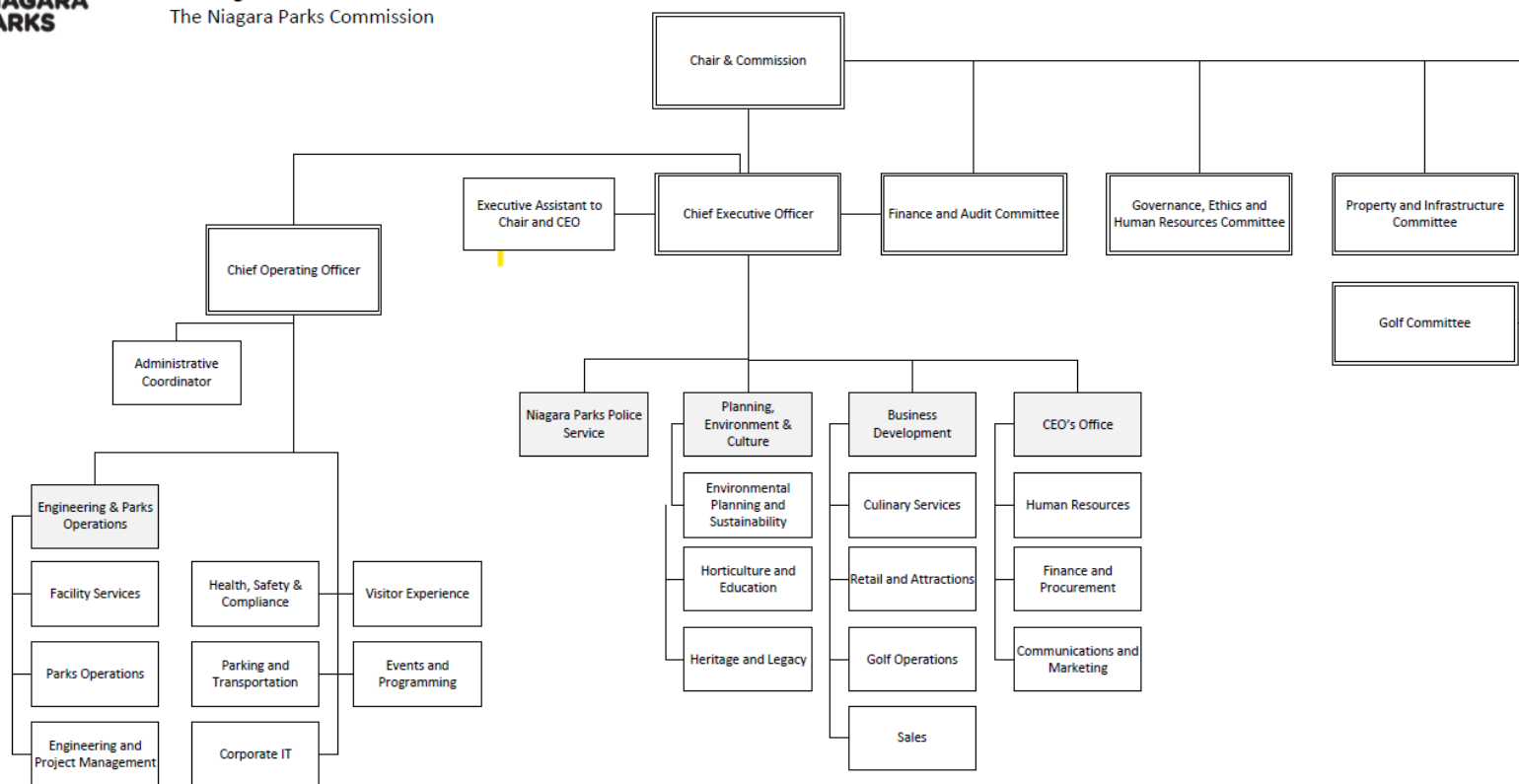
Corporate Structure

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 5 below.

Table 5 - 2024 Organizational Chart



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 2025-28, 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 \$31.9 million worth of deferred maintenance capital projects throughout 2025-26, including:

- Substantial road repaving work across Niagara Parks
- Improvements to trails, sidewalks and pedestrian bridge replacements
- Netting replacement and new building automation system at the Butterfly Conservatory
- Repairs and upgrades at the Fort Erie Breakwall and Niagara River Recreation Trail
- 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 2025-2028:

- Risk assessment and hazard control programs using an enterprise-wide approach with a focus on preventing employee and guest incidents and injuries.
- Continue to manage and track the organizational compliance inspection schedule utilizing technology to improve efficiencies and record keeping whenever possible.
- Revise and maintain the emergency response and business continuity planning program.
- Continued commitment to employee communication and participation by delivering internal training and facilitating external training to support the safety of Niagara Parks employees and providing regular communications such as Safety Talks, All JHSC meetings, emails, etc.
- Assess the ongoing risks related to outdoor hazards (heat, cold, insect bites, poisonous plants) and develop controls (communication, training, etc.) to address the risks for both employees and guests.
- Continue to track continuous improvement opportunities within the health, safety and compliance department and other applicable departments.
- Focus on emergency planning training, drills and exercises to ensure applicable employees are trained and knowledgeable to respond in the event of an emergency.
- Initiate and manage accessibility projects with an aim to create a diverse and inclusive environment to improve the overall guest experience and create an accommodating workplace for future and existing employees.

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 travelling into Niagara Falls with GO Transit, to provide connection from the train station to Table Rock Centre. In the fall of 2024, with the existing WEGO agreement coming to an end and the amalgamation of local transit with Niagara Region Transit, Niagara Parks officially took over operations of an additional WEGO route, the Blue Line. The Blue Line travels throughout the main tourism areas of the destination beyond Niagara Parks property. By taking over its operation, Niagara Parks ensures that guests continue to have access to an integrated tourism transit system within the destination.

As of September 3, 2024, Niagara Parks will be operating the Blue Line on a two-year trial basis, in addition to the Green Line, which it has operated since 2012.

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 various functions across the organisation that support the delivery of visitor touchpoints and experiences including ticketing for attractions and transportation services both in-Park and through NPC's extensive online store, in-Park and through third-party channels. Product development will continue to be a focus with the goal of developing experiences that drive sales of NPC products and services. For 2025-2028, processes will continue to be evolved to address the changing demands and expectations of guests, including the on-going process of refining purchase flows and the improvement of experiences to support the strategic goal of delivering great guest experiences.

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. Programming also provides a means to slow guests down, so they stay longer within the park, assist in directing guests between venues, leverage under-utilized sections of the park and/or provide a means to fill the gap between capital investments or improvements. Programming is a pivotal component of delivering the corporate strategic pillar to showcase our rich heritage, culture and lifestyle.

Niagara Parks' corporate theme for 2025-26 is "Curiosity" which will resonate within the activations delivered throughout the year, encouraging guests to explore more of Niagara Parks.

Two key deliverables for 2025 will include a new permanent public art piece by Alex Heveri within the Niagara Parks Butterfly Conservatory. This one-of-kind, stained glass art piece of a Blue Morpho butterfly will be unveiled during the Family Day weekend with programming extending through March Break designed to celebrate art and educate about the importance of pollinators and migration. From March to October, Niagara Parks will also unveil a new temporary exhibit focused on Nikola Tesla at the Niagara Parks Power Station. In collaboration with the Nikola Tesla Museum in Belgrade, Serbia, the exhibit will educate guests about the life of Tesla and his nine patents found within the Station that contribute to the success of hydropower. The legacy of this collaboration will be the foundation of an exhibit that Niagara Parks can build upon once the models are returned.

For 2025-28, Niagara Parks will continue to seek partnership with brand-aligned third-party organizations to host select signature events at its properties rather than several smaller in-house events. This approach allows for better resource allocation and cost-sharing opportunities while still ensuring an excellent guest experience in the Park.

Planning, Environment and Culture

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

The Planning, Environment and Culture unit oversees the long-range planning, park design and development, stewardship policy and implementation of Natural and Cultural Heritage mandate delivery for Niagara Parks. Through its team of professionals, the unit provides oversight of all land



use planning of 1,440 hectares, cultural heritage landscape conservation planning for Queen Victoria Park including the 56 km Niagara River Parkway and the School of Horticulture & Botanical Gardens.

The unit aligns work activities around four theme areas:

- Promote the highest standards of horticulture design excellence, provide design support for NPC events and increase the outreach of Niagara Parks educational programming to showcase Niagara Parks cultural and environmental expertise.
- Demonstrate innovation in planning and design of environmental stewardship initiatives that enhance the stewardship of the 56 km Niagara River corridor.
- Demonstrate the highest standards of park maintenance as a leader for maintaining a sustainable eco-tourism destination.
- Showcase cultural heritage assets of the Niagara River corridor and integrate the Niagara indigenous story.

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 2025-28:

- 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%. With the help of the Toonies for Trees program through the Niagara Parks Foundation and Community Tree Planting Events, the annual tree planting target was surpassed for 2024-25 with over 7,500 trees planted across Niagara Parks. An inventory of planting areas has been developed and prioritized to align with monitoring ongoing tree health across the park. To increase planting success, Niagara Parks has engaged with the Vineland Research and Innovation Centre to analyze soil conditions and provide recommendations for soil improvements, prior to planting to assist with appropriate species selection. In collaboration with Niagara College's Ecosystem Restoration Program, land management plans are being developed, starting with Niagara Parks' Chinquapin 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 at the Gonder's Flats wetland site has proven to be successful and will be adopted as an ongoing invasive species management technique where appropriate. 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 eight kilometres 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 through the Niagara Parks Foundation, 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 two 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 has engaged a coastal engineering firm to develop an alternative shoreline protection solution that also supports aquatic fish habitat. Based upon this alternative design, phased implementation of new shoreline protections is being implemented over the next several years.



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 focus for Heritage and Legacy include:

- Black History

Throughout 2025-28, 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 2025-26, Niagara Parks will continue its partnership with the Niagara TD Jazz Festival, including hosting a special event in honour of Black History month.

- 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. In 2024-25, Niagara Parks developed a bus tour specific to its north parkway properties.

Throughout 2025-28, Niagara Parks will continue to collaborate with Indigenous communities on a variety of projects and initiatives, including the upcoming Flying Theatre attraction, as well as annual events and programming in honour of National Indigenous History Month in June, National Day for Truth and Reconciliation in September and Indigenous Veterans Day with its Valour and Victory ceremony in November.

- Nation Building

Niagara Parks delivers a place-based experiential tourism program that builds on the theme of "Nation Building" included within each of the four heritage properties. Messaging and programming activities highlight the significant individuals per locale who played a key role in both Canada's origin story and their historic exploits within the Niagara River corridor. Nation Building remains as a common story line to connect the heritage sites along with Niagara Parks cultural spaces and strengthens the Explore the Niagara tourism messaging.

- Education Programs



Throughout 2025-26, Niagara Parks' Parks Environment and Culture staff are developing educational programs that aim to educate visitors about the Niagara River corridor's history and heritage, natural environment, and cultural significance. These include guided nature walks, wildlife talks (bird watching with the forthcoming viewing platform at the Chippawa Battlefield for example), historical reenactments, and workshops on topics such as history, conservation, and sustainability. Implementation of interpretative plan elements at Niagara Parks natural areas include Gonder's Flats, Locust Grove, Niagara Glen, Queenston Heights Park, and Dufferin Islands. The emphasis is on program designs that are consistent with Ontario's education curriculum, thereby increasing educator awareness of how Niagara Parks destinations can support existing experiential learning standards.

Horticulture and Education

As a global destination and leader in horticulture, Niagara Parks teams incorporate the expression of park Mission and Vision through horticulture design. The emphasis of work translates through deliberate design and curation of our public green spaces, parks, forests, attractions, business nodes, points of entry, and exhibits. Through strategic focus and effective use of plants, designed by horticulture staff, Niagara Parks curates excellence with attention to detail, transforming guest experience into memories. Prime examples include the introduction of Mosaiculture (topiary artforms of fanciful creatures), interior décor to all restaurants, dynamic artist flair with exhibit spaces, wholesome storytelling and interpretation, effective connection with our peoples and unique location.

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 2025-28.

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

The main focus for retail and attractions for the 2025-28 business planning cycle is the launch of Niagara Parks' newest attraction, a flying theatre ride at Table Rock Centre. In addition to a newly developed retail store, the attraction will also have an associated line of branded retail merchandise.



Based on favourable visitation patterns and guest feedback collected through digital surveys, Niagara Parks will be looking at opportunities to extend hours of operation at certain attractions during the peak tourism season.

Within this business planning cycle, 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.

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

Niagara Parks Culinary Services operates both full-service restaurants and quick-service restaurants, as well as provides off-site catering support for special events and corporate clients. After a very successful 2024 opening of the new Table Rock Bistro and Wine Bar, Culinary Services will look to build on that success and continue to provide an exceptional guest experience while showcasing over 60 Niagara wines and 20 Niagara beers, paired with a locally sourced menu. The newly renovated Whirlpool Pub reopened in 2024 and was well received by golf clientele and a local audience who were greatly anticipating its reopening. Culinary Services will work closely with colleagues in the Sales, Marketing and Golf Departments to help to drive business to that location throughout 2025-28.

Culinary Services will be implementing a pilot program to test the use of a self-service kiosk at Table Rock Market. If successful, the team will look to implement similar kiosks throughout other quick service locations as a means of increasing the guest check average and throughput, while improving the overall guest experience.

The addition of a custom-made antique popcorn wagon in 2024 not only increased revenue for Table Rock Market but also provided our guests with a unique and convenient snack at the brink of the Falls. Continuing to build on incremental sales initiatives such as this will be a focus over the next few years to diversify the revenue stream for Culinary Services, such as adding premium gelato carts to the outdoor offerings as well as an indoor antique popcorn wagon for Table Rock Complex.

Additionally, the team will be introducing a new all-inclusive year-round wedding package for Queenston Heights and Legends on the Niagara for the 2025 season. This package will provide clients with multiple courses to choose from within one set price, further elevating Niagara Parks' wedding offerings.



Golf Operations

Golf Courses: Legends on the Niagara, Whirlpool Golf Courses

Niagara Parks offers two championship golf facilities – Whirlpool Golf Course and Legends on the Niagara. At Whirlpool Golf Course, restoration work will continue so that course conditions are closer aligned with the original Stanley Thompson design, as established in 1951, addressing impacts to course conditions that have resulted over the years. The golf operations team will also be implementing a number of improved experiences at Niagara Parks golf courses including a phased plan to replace the golf cart paths, efforts to improve playing conditions and providing a new continuous guest shuttle service at Legends.

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 have been working with the ERP system, Unit 4, to streamline and improve business processes. Through this system, Finance and Procurement have 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 2025-26 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 providing communications and marketing support for all of the projects identified within the Implementation Plan and other operational projects, key areas of focus will be supporting the launch of the new flying theatre attraction in 2025 and upcoming private sector redevelopment of Toronto Power.

For 2025-26, Niagara Parks plans to develop a refreshed social media plan that outlines content direction and strategy for the year ahead, based on trends and successes noted in 2024-25.

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, Niagara Parks Power Station, White Water Walk and the Butterfly Conservatory. Plans are in development to add the service at the Niagara Parks Flying Theatre attraction, coming summer of 2025.

Niagara Parks also finalized its lease agreement with Toronto Power Hotel Inc. in the fall of 2024 for the redevelopment of Toronto Power Generating Station. Similar to Niagara Parks' other tenant agreements, the public-private partnership with Toronto Power Hotel Inc. includes a base and variable rent payment structure, with Niagara Parks retaining ownership of the property.

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.



A new MOU was approved between the Niagara Parks Commission and the Regional Municipality of Niagara Police Services Board in 2024 which is in compliance with the Community Safety and Policing Act which came into force the same year. Training for members of the Niagara Parks Police Service remains a priority throughout the officer's careers with Niagara Parks and promotes compliance with the new policing legislation.

Over the course of 2025-28, Niagara Parks will be continuing to add capacity within the Niagara Parks Police Service with the hiring of more provincial offences officers to protect public safety across Niagara Parks' properties with a concentration in the core of Queen Victoria Park which receives the highest volume of visitation.

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 intakes 15 students each year for a total of 45 apprentice horticultural students learning and applying their trade skills on the Botanical Gardens property.

Niagara Parks Foundation

The Niagara Parks Foundation is a board-governed registered charity that was officially **launched** 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 projects that the Foundation will be focusing on throughout 2025-28 include:

- Tree planting
- Development of new Children's Garden
- Creation of new skating loop at the Floral Showhouse
- Indigenous Programming & Nature Tours
- Preservation and interpretation of the original 1764 Fort at Old Fort Erie
- Recreation Trail Redevelopment



- Children's Programming

The Niagara Parks Foundation recently established a fundraising plan and a new Strategic Plan. Additionally, a full-time Fundraising Director was hired in 2024. The Foundation will be proceeding with a capital campaign to support the development of a new Children's Garden at the Niagara Parks Botanical Gardens. In addition to fundraising, the Niagara Parks Commission will also be contributing to the project. Further details on the Children's Garden and new skating loop are captured within the Implementation Plan.

9.0 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

Data collection is an important mechanism upon which NPC assesses the performance of its various operations, including gauging guest satisfaction with its products and services. Staff regularly review guest feedback to measure guest perceptions and ensure any trends, either positive or negative, are proactively addressed.

Guest feedback was sourced through a variety of methods in 2024 including direct surveys, online user generated content reviews and secret shopping initiatives. The key objectives of survey collection and guest feedback included:

- Providing a mechanism to engage with guests' post-visit;
- Assessing satisfaction levels with NPC products and services;
- Collecting data to use as a business intelligence tool that informs decisions making; and
- Proactively identifying and addressing any trends or issues.
- Ensuring alignment with the priorities as highlighted in NPC's mandate letter from the Ministry of Tourism, Culture and Gaming including data-driven decision-making.

Staff measured feedback related to NPC products and services through various methods including:

- Online surveys of guests who purchased an NPC attractions' pass;
- Niagara Parks Golf (customized based on guest usage of either Whirlpool or Legends on the Niagara Golf products);
- Online reviews of user generated reviews through sites such as Open Table, Trip Advisor and Google Reviews;
- Secret shopping program to gauge culinary operations for both full-serve and quick-serve operations.

Overall, data collected in 2024 provided meaningful insights on guest satisfaction and feedback on NPC's products and services. These efforts will continue in 2025, with staff looking to improve the quality and quantity of guest feedback methods.

Attractions Pass Survey Results

Increased emphasis was placed on improving the survey design and collection in 2024. A total of 847 survey responses were collected. The survey, which is purposely designed to be brief, consists of seven questions that measure guest satisfaction with our attractions passes with the opportunity to provide written feedback on the breadth of their Niagara Parks experience through a final open-ended question. Survey results are summarized as follows:

- Respondents were asked to rank their reason for purchasing the pass and in keeping with 2023 results, value for money is the number one reason for purchase:

Reason Cited	Result
Total cost savings and value for money	53.5%
Included the attractions I wanted	33.6%
Convenience of included transportation	6.6%
Ease of purchase and redemption	5.8%
Other	0.5%

- When compared to 2023, “Value for Money” grew by 6% as the reason for purchase, affirming that the Niagara Parks Pass products are consistently perceived as providing good price value and that budget is a key consideration for Niagara Parks’ customers.
- 95.6% of respondents rated the value for money delivered by the attractions pass as either excellent or very good.
- Over 96% 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 94.5% (an improvement of 1% over the previous year) 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 (39%); google search (28.6%); and social media (16.3%). 10.5% of respondents cited “word of mouth” as their knowledge source.
- Approximately 57.6% or 488 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. The sentiment results were as follows:

Sentiment	Result
Positive	54.9%
Neutral (no sentiment, or a mix of positive and negative)	33.4%
Negative	11.6%



- When compared to the previous year, the number of positive feedback grew by 3.6% and the negative feedback decreased by 5.3%

The following is a sampling of some of the positive feedback provided:

"This pass was so amazing we got to see so much for a great price, and the included transportation made it incredibly convenient as we were able to get on at our hotel and not have to drive anywhere the whole weekend! We couldn't say enough good things about it to our friends, and we plan to come back next summer and do it all again!"

"My experience at Niagara Parks was excellent. The scenic beauty was breathtaking, with well-maintained landscapes and peaceful surroundings. The staff were friendly, knowledgeable, and provided great hospitality. Additionally, the cleanliness of the facilities, including restrooms and dining areas, contributed to an enjoyable visit."

"The bus pass alone was worth the purchase! So convenient having one pass for multiple attractions."

"I was blown away by the exceptional service from every employee involved in this process 11/10"

"We have spent some great moments as a family doing the excursions through NIAGARA PARK, they are spectacular, we have been very impressed, excellent directions, very clean access and attentive staff. we are sorry to leave."

"The Adventure Pass was a great value."

There was some negative feedback or suggestions for improvement received as well. Of the negative feedback received, the most common related to:

- Wait times: feedback included frustration with long lines at some locations during the peak season
- Transportation: communications around the schedule and timeliness of buses
- Communication: hours of operation, or more information needed to navigate the Park.

As the 2024-25 fiscal year concludes and ahead of the 2025-26 tourism season, Niagara Parks will finalize its action plans to address these issues and any other identified trends from the data.

Invest in new enhancements to the Niagara Parks Butterfly Conservatory and White Water Walk

Continuous investment in the visitor experiences at Niagara Parks' attractions supports annual attendance and revenue growth. The Niagara Parks Butterfly Conservatory welcomes over 250,000 guests annually and functions as one of the organization's top attractions and demand generators. While the timeless experience of exploring the tropical garden oasis of the main conservatory space

remains strong, there are significant opportunities to enhance and expand the guest journey in the exhibit spaces and main entrance areas of the attraction.

Mirroring the successful approach taken to update the visitor gallery at Journey Behind the Falls in 2023, Niagara Parks staff team will develop an interpretive plan for upgrading the exhibit areas of the Butterfly Conservatory. Content will provide accessible and educational content, delivered through engaging physical and digital installations. Additional upgrades will be made to update branding and signage elements throughout the site, increasing consistency and quality perceptions of the park for visitors.

Building on investments made at White Water Walk in 2024, new infrastructure, interpretive and signage elements will also be implemented at White Water Walk. Planned investments include upgrades to boardwalk lookout areas, offering improved viewpoints for guests, along with updated exhibits and signage across both the boardwalk and entry areas of the attraction.

- Monitor year-over-year trends in visitation and revenue to the Niagara Parks Butterfly Conservatory and White Water Walk
- Improve the collection and monitoring of guest feedback at the Niagara Parks Butterfly Conservatory and White Water Walk and identify ways to improve customer satisfaction at the attraction

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.

With even more visitation on the horizon in Queen Victoria Park with the redevelopment of Toronto Power and potential redevelopment of Ontario Power Generating Station, there is a need to improve traffic and circulation within the area, which will also improve the overall guest experience.

Introducing a new visitor transportation system focused on the core of Queen Victoria Park will help alleviate pressures on the Niagara Parkway while providing a brand-new attraction and demand generator for the destination. 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 expects to make an announcement about next steps for the Visitor Transportation System in the next fiscal year.

In anticipation of the announcement of a new visitor transportation system, staff will develop a comprehensive public engagement strategy. Leveraging social media channels, public meetings, and close collaboration with community partners, the strategy will seek to inform guests and residents, gather feedback, and proactively address potential concerns about the new transportation system.

- Leverage sensor data to improve understanding of traffic flow through Queen Victoria Park and proactively manage high-volume periods
- Increase the use of alternative and active transportation within Queen Victoria Park, thereby improving the circulation and safety of pedestrians
- Develop a comprehensive public engagement strategy to inform future planning for Queen Victoria Park, including new Visitor Transportation System

Increase number of public washrooms within Queen Victoria Park

With the increase in demand on services within the core of Queen Victoria Park, Niagara Parks has conducted 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.

Niagara Parks completed renovations to its public washrooms at Table Rock Centre, most recently on the top floor of the building in preparation for the new flying ride attraction. Additionally, upgrades were made to improve access and visibility for recently renovated public washroom facilities next to the Queen Victoria Park event stage area.

Preparations have begun for a new public washroom facility to be built outside of the Niagara Parks Power Station, next to Niagara Parks' main parking lot, Falls Parking Lot. The location of the new public washroom will provide additional amenities for guests visiting Niagara Parks' top tourism area, Queen Victoria Park, and will provide improved convenience for guests parking at Niagara Parks' premium parking outlet, Falls Parking Lot. Niagara Parks anticipates the new washroom to open in 2025. Throughout 2025-28, Niagara Parks will continue to assess the results of the public washroom audit to inform future planning. There are plans to address public washroom facilities at Grand View and the area surrounding Oakes Garden Theatre within this business planning cycle.

- Ensure all high-traffic areas within Queen Victoria Park have convenient access to a public washroom facility.

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. The Guest Services Centre has also recently expanded to provide services seven days a week, with the goal of reducing the average resolution time for incoming tickets.

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 also assisted in quick responses to standard questions from guests. The new ChatBot is also helping to divert common queries away from less efficient reporting channels, optimizing organizational capacity and directing Guest Services resources to priority areas.

In 2024, staff introduced an improved satisfaction survey for guests who engage Guest Services through either email or the new ChatBot, in order to better understand guests' experience and improve customer satisfaction. Staff also created a new digital platform to consolidate, track, and analyze incoming feedback. This new platform allows Guest Services to develop and report on outcome focused performance measures, identify opportunities for improving response times, and improve customer satisfaction. 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.

- Maintain or improve the average full resolution time for incoming tickets. Identify potential disruptions or variances (such as high-volume days or periods) in order to mitigate and proactively address guests' concerns
- Monitor the volume and content of 'one touch' tickets to identify and proactively address frequently asked questions
- Monitor the average first response time for incoming tickets in order to track the impact of expanded seven days a week service
- Explore the feasibility of a live chat channel during peak tourism periods
- Monitor the distribution of feedback across all channels in order to measure the effectiveness of the new ChatBot in managing traffic volumes
- Continue to explore integration opportunities with 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 2025-2028, Niagara Parks will continue to leverage its digital presence and social channels to drive visitation, in addition to its regular sales and marketing efforts.

Adding to this success is a projected \$145.9 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 \$183.4 million in revenue from all sources. This contribution is \$21 million higher than what was budgeted for 2024-25 and \$16 million higher than revenues achieved in 2023-24.

For the year ending March 31, 2025, Niagara Parks is projecting \$145.9 million collected 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 \$16 million when compared to 2023-24.

For fiscal 2025-26, Niagara Parks is targeting to increase its contribution, with a surplus of \$78.0 million net contributions from RPOs which represents an 8% increase from the projected performance of the RPOs in fiscal 2024-25. This increase is due to the anticipated financial impacts of the launch of the new flying ride attraction, as well as adjustments for the seasonal start and other key operational considerations. Additionally, capital investments in the prior year will continue to drive revenue growth with enhanced visitor experiences. Niagara Parks is anticipating the launch of the new attraction, as well as other new offerings, will result in benefits across its operations. Due to the tighter margins within culinary operations, a more modest growth is anticipated. As well, significant capital work is planned at Niagara Parks' golf courses over the next three years which is reflected in its projected contribution. Similarly, required repairs and maintenance will be undertaken at the Falls Incline Railway resulting in closures, which is reflected in its projected contribution.

This is captured in table 6 below.

Table 6 – 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	Incline Railway	Culinary	Golf	Total	
April 1, 2025 - March 31, 2026	\$ 14,823	\$ 37,665	\$ 16,640	\$ 1,544	\$ 6,793	\$ 555	\$ 78,020	
April 1, 2024 - March 31, 2025	\$ 13,670	\$ 33,702	\$ 15,398	\$ 1,650	\$ 6,771	\$ 1,196	\$ 72,387	
\$ increase in contribution	\$ 1,153	\$ 3,963	\$ 1,242	\$ (106)	\$ 22	\$ (641)	\$ 5,633	

- Increase revenue generated at Niagara Parks' attractions by 11% in 2025-26
- Increase revenue generated at Niagara Parks' retail outlets by 8% in 2025-26

- Increase revenue generated by Niagara Parks' parking and transportation services by 8% in 2025-26
- Maintain revenue levels at Niagara Parks' culinary outlets in 2025-26

New Flying Theatre Attraction

Niagara Parks developed a pricing strategy for its new flying theatre attraction informed by market research and focus group testing. Pricing will play a critical role in meeting NPC's financial goals including a payback of approximately five years on its capital investment. As part of the work to propose rates and fees, focus groups were conducted virtually in three (3) test markets including Toronto, New York and Chicago. Three price-points were tested through the groups with the American markets more amenable to the higher pricing and the Canadian market more receptive to lower price-points. In addition, staff considered several other factors when proposing pricing for the attraction including:

- A review of the competitive price set of other Flying Theatre attractions
- Ensuring the price point supports the goal of a five-year payback
- Maximizing margins and average sales
- Consideration of the savings proposition in including the new attraction within NPC attractions bundled products
- Ensuring the price point offers value for money for Niagara Parks visitors
- Consideration of pricing sensitivity
- Alignment of pricing with other Niagara Parks products and services
- Consideration of previous attendance levels for the Niagara's Fury attraction
- Inflationary pressures on the cost of goods, labour and utilities and covering increasing costs

Based on these factors and feedback from the focus groups, Niagara Parks established a price-point for the flying theatre attraction and used it to model the financial proforma for the first 12 months of operation, using low, medium and high scenarios.

In addition to meeting its revenue goals, Niagara Parks will collect guest feedback through the use of digital surveys and through its Guest Services Centre to understand guest satisfaction with the new attraction and make any improvements as needed.

Leverage market research to drive growth and support strategic development

Niagara Parks is improving visitor data collection and analysis heading into 2025. This includes the addition of a full-time Research Analyst position in October 2024, ongoing efforts to improve guest surveys, and the creation of a first-ever 'Consumer Profile' in December 2024. This Consumer Profile outlines visitation patterns in Niagara Parks relative to broader domestic and international trends and will serve as a valuable tool for supporting data-driven decision making at Niagara Parks. In 2025, this research will be used to develop strategies for improving visitation, spending, and customer satisfaction across key market segments, as well as for

growing visitation during shoulder seasons. Niagara Parks will also work with community and industry stakeholders to coordinate research and data collection, share key market insights, and promote the growth of tourism in Ontario and the Niagara Region.

- Explore opportunities for improving data collection, analysis, and visualization within Niagara Parks, including through the revision of existing guest surveys
- Explore opportunities for improved information exchange with industry stakeholders and community partners in order to coordinate market research and promote the growth of tourism in the Niagara region
- Maintain a 'Consumer Profile' that highlights visitation patterns and performance relative to regional, provincial, national, and global trends
- Identify strategies for improving spending and retention at Niagara Parks, as well as for expanding business during shoulder seasons

Explore opportunities for new revenue generation

Redevelopment of Power Stations

The redevelopment of the Toronto Power Generating Station is a revenue-generating opportunity with 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. This will turn the Toronto Power Generating Station from a liability to an asset and will result in new revenues for Niagara Parks.

Niagara Parks will continue to explore the potential redevelopment of Ontario Power Generating Station throughout 2025-28, with the goal of developing a new revenue-generating opportunity at the site.

Tennis and Pickleball Courts

Niagara Parks is currently redeveloping its tennis courts at Queenston Heights Park, creating four new tennis courts and four new pickleball courts for the 2025 season. In October 2024, Niagara Parks approved an operational model for these courts, including operating hours, service offerings, and a court schedule that will control access for regular users, or members, and non-member public use. Membership fees are projected to generate \$32,750 in revenue in 2025, while drop-in fees for non-members are expected to generate \$10,000. The option for tournaments, court buy-out events, private lessons, leagues, or other services will also be a future consideration after the first year of operation.



Culinary Initiatives

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 opened the Table Rock Bistro in the summer of 2024, taking over a former retail space that was unused and providing better connection to the existing patio. The Bistro showcases 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.

An increased contribution for 2025-26 is predicted for the Table Rock Bistro as the upcoming fiscal year will represent the location's first full year of operations.

- Increase overall sales at Table Rock House Restaurant (including Table Rock Bistro) by 5% for 2025-26

Popcorn Cart

Niagara Parks' Culinary Services department introduced a custom antique popcorn cart to sell popcorn, soft serve ice cream and bottled beverages to guests visiting the high-traffic area around Table Rock Centre. The popcorn cart was operational from August 10 – October 14, 2024, and generates over \$100,000 in sales revenue. For the next year, with a full season of operations, sales of at least \$400,000 are anticipated.

Digital Kiosks

The pilot program to introduce digital kiosks at Niagara Parks' quick serve culinary outlet at Table Rock Market is expected to raise the average cheque balance. Industry standards for the introduction of digital kiosks show an average 10-12% increase per transaction. Based on findings of the pilot program at Table Rock Market, staff will consider the introduction of new digital kiosks at key quick serve locations across Niagara Parks.

Strategic Goal #3: Expand our Digital Service Delivery

KPIs "Actions"

Improve cellular connectivity for guests across Niagara Parks properties

Niagara Parks is 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.

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 will help 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 cellular network capacity issues in a more targeted geographic area.

- Monitor the number of monopoles and small cells implemented across the Niagara River corridor, and coordinate with Shared Tower Inc. to track the % complete based on the total number of monopoles and small cells to be implemented
- Explore opportunities for data collection to understand guest satisfaction with the upgraded service

Launch of new Consumer Website

A key initiative regarding digital service delivery for 2025-2028 will be the redevelopment of Niagara Parks' consumer website. To prepare for this project, Niagara Parks has begun a comprehensive audit of its current website to identify gaps and areas for improvement, 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.

Improve SEO Strategy 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. Between January and October 2024, the website saw its highest ever traffic, with over 7.2 million visits, a 23% year-over-year increase, while recording over 16 million unique page views, up 26% year-over-year. Niagara Parks also produced its most profitable month on record for online sales in July 2024, generating \$3.7 million, eclipsing the previous high of \$3.0 million set in August of 2023. In terms of total online sales, Niagara Parks' website generates \$16.5 million from January to October 2024 compared to \$14.2 million generated for the same time period in 2023.

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. Niagara Park' digital marketing team will continue to assess improvements to the user experience and sale conversion rates on the current website moving forward and these will be key considerations in the development of the new consumer website as well.

Continued implementation of new digital ticketing capabilities with WEGO

In the fall of 2024, Niagara Parks introduced a new digital ticketing option for its WEGO bus services. The new system allows guests to scan their ticket directly from their mobile device, rather than requiring a separate printed ticket. The new scanners have been installed on Niagara Parks' WEGO buses and connect directly with its online ticketing solution, Accesso. The digital system also allows for greater business intelligence data to support data-based decision making.

- Monitor guest feedback on new digital ticketing system and make adjustments as needed
- Monitor and analyse new WEGO customer data provided through Accesso to support data-based decision making, including with future planning for Queen Victoria Park

Explore opportunities for the responsible use of new technologies

In 2024, Niagara Parks established internal guidelines regarding the use of Generative Artificial Intelligence (Gen AI). These internal guidelines reflect established best practices and provincial guidelines and support the protection of individual, business, and organization data by reporting Artificial Intelligence uses and actively managing data and cybersecurity.

In 2025, Niagara Parks will continue to explore opportunities for the further use and integration of artificial intelligence across Niagara Parks, in order to optimize organizational capacity, support data-driven decision making, and simplify client/customer interactions by improving the accessibility of key services and attractions.



Strategic Goal #4: Strengthen Collaborations with Partner Organizations

KPIs "Actions"

Increase engagement with local destination stakeholders to grow tourism

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 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. For 2025-26, Niagara Parks will aim to direct more traffic to the Fallsview Retail Store to increase opportunities for revenue growth at this location.

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. Each year, Niagara Parks will assess hotel partners and make enhancements as needed to improve the overall experience and provide value for guests.

Grow partnerships to deliver on mandate of environmental and cultural stewardship

In addition to partnerships that grow tourism, Niagara Parks will also be focused on expanding opportunities for collaboration with local organizations that contribute to its mandate of environmental and cultural stewardship. In 2024, Niagara Parks partnered with the Niagara Jazz Festival to host two musical events. The first was part of their Twilight Jazz & Blues Series highlighting Black History Month with an event by musician and music educator at Table Rock House Restaurant. The second event was the kick-off to their summer Jazz Festival series at Oakes Garden Theatre featuring music by the Blackburn Brothers and the Sean Stanley Quartet. Both special events highlighted the Niagara region's rich black and Indigenous history while providing guests with a significant cultural experience at a Niagara Parks venue.

For 2025-28, Niagara Parks will continue to grow its new partnership with the Niagara Jazz Festival, as well as its partnership with the Niagara Grape and Wine Festival to host the annual Icewine Gala at the Niagara Parks Power Station. The Cool as Ice Gala is the highlight of Icewine season in Niagara, offering gourmet menu selections from top restaurants in Niagara, as well as Icewine and regular wine tastings from many of the region's top wineries. In addition to financial benefits as the host venue, the event is an opportunity to align with a local organization to provide a spectacular guest experience for all who attend.



On the environmental stewardship side, Niagara Parks has partnered with Vineland Research and Innovation Centre to implement a new soil analysis program to inform tree planting efforts. This program has had great success in guiding tree species selection for planting locations to ensure optimal growth conditions. Over the course of 2025-28, Niagara Parks will explore additional opportunities for collaboration through this partnership.

Post-Secondary Institutions

Through the hiring of a full-time Research Analyst in October 2024, Niagara Parks is improving internal data collection, analysis, and research efforts. In April 2024, Niagara Parks also signed a new Memorandum of Understanding with Brock University, affirming interest in expanded research partnerships between the two organizations.

In 2025, staff will explore ways to grow collaboration between Niagara Parks and the Niagara region's three post-secondary institutions (Brock University, Niagara College, and the University of Niagara Falls Canada). This includes more opportunities for student and faculty research, experiential learning, and the integration of Niagara Parks staff and operations into local curriculum. These collaborations will help to promote the growth of the tourism industry within Niagara, as well as to support data-driven decision making within Niagara Parks.

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.

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 2025-28, 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 2025-2028, 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 joint marketing campaigns for the Ontario and drivetime US markets. For 2024-25, the program was offered again, but with a focus on US drive market for the spring/summer campaign. For the fall season, campaigns were offered for both the US drive and Ontario markets, which aligned with Niagara Parks' goals of increasing visitation during the shoulder seasons. Niagara Parks participated in opportunities for both the Ontario and US drive markets, given the importance of those two segments for Niagara Parks' visitation.

For the US drive market spring/summer campaign, 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. Running from May 20 – June 30, 2024, 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 spring/summer campaign were 282,541. The fall campaign ran from August 19 – September 22, 2024, resulting in 269,286 total leads to Niagara Parks' website.

Niagara Parks also participated in Destination Ontario's fall campaign for the Ontario market, which offered a matched \$25,000 investment (\$50,000 total) to position Niagara Parks' products and experiences to drive visitation during the fall. The theme was outdoor adventures and the campaign was in-market from August 26 – October 6, 2024. In total the campaign delivered 167,224 landings to Niagara Parks' deals page.

Niagara Parks will be exploring similar joint marketing opportunities for the 2025-26 season with Destination Ontario.

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 2025-28, 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.

10.0 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 Gaming. 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	Operate according to mandate without the need for government financial assistance to adequately preserve physical assets while delivering on 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. As its financial position has improved, Niagara Parks has increased its capital spending to address deferred maintenance.
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; 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 1	
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 new flying theatre attraction, new culinary opportunities such as the addition of popcorn carts at Table Rock Centre, 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 related to environmental and cultural stewardship; In fiscal 2024-25, capital spending grew to \$69 million with a balanced distribution between deferred maintenance to preserve Niagara Parks' assets and strategic investments to grow tourism and enhance visitor experiences. For 2025-26, Niagara Parks is implementing a capital budget of \$51 million, aiming for a 40/60 ratio within capital spending to ensure a balance between investments into deferred maintenance and strategic projects to improve its guest experiences and grow the business.
Target Mitigation Dates	Monthly financial reports to Commission, including cash flow projections

Risk 2	
Objective	Manage growing visitation levels in Queen Victoria Park by implementing changes to improve the public realm.
Risk Factor	If Niagara Parks does not implement measures to improve public access within this core tourism area, this would result in both safety concerns and negative impacts to the guest experience.
Risk Statement	Over the past several years, visitation has grown to the core of Niagara Parks' properties within Queen Victoria Park, an approximately 5-kilometre stretch bordering Niagara Falls. The high volumes of pedestrians and vehicles particularly during the summer months severely limit movement and access, pose safety concerns and detract from the guest experience within this important tourism area. With the opening of the Niagara Parks Power Station and upcoming opening of the new flying theatre attraction at Table Rock Centre and redevelopment of the power stations, visitation is expected to continue to increase to this area. Niagara Parks will be implementing measures using a phased approach that will expand and improve the pedestrian area, with the long-term goal of reducing the number of vehicles within Queen Victoria Park. While these measures are intended to

Risk 2	
	improve the experience of pedestrians and walkability of the park, there is the potential that vehicular congestion may increase in the short-term. A strong public communication and engagement strategy will be required to reinforce the need for these changes and gain public acceptance and endorsement.
Risk Category	Operational: • Financial • Business Continuity • Infrastructure Strategic: • Reputation
Existing Controls	Niagara Parks will be implementing a phased approach to public realm changes within Queen Victoria Park, beginning with temporary changes including lane reductions using jersey barriers; a comprehensive data collection plan will aid evidence-based decision making; a public communications plan will support the changes, emphasizing why these measures are required with a focus on local residents, but also including the visiting public; Niagara Parks has established an advanced holiday road closure schedule to advise the public and local municipalities/fire/EMS about road closures on peak visitation weekends and to ensure greater efficiency from a staffing and resources perspective.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium-High (12)
Mitigation/ Action Plan	The plan will begin with introducing temporary measures in the summer of 2025, including expanding the pedestrian walkway throughout Queen Victoria Park by installing jersey barriers in a northbound lane of the Niagara Parkway (reducing northbound traffic to one lane). These measures are supported by a robust communications plan including direct communication with bordering municipalities, Public Notices issued to local media and posted on Niagara Parks' website, internal communications and on-site signage. Additionally, data will be collected from key traffic areas to inform future phases of the project.
Target Mitigation Date	Niagara Parks will be repaving the Niagara Parkway from Fraser Hill to Clifton Hill from April 22 to May 6, 2025. As part of this paving work, jersey barriers will be placed in one of the northbound lanes. Public communications have been issued in advance of the work and feedback will be collected along with hard data to support future phases of the project.

Risk 3	
Objective	Facilitate the successful redevelopment of the Niagara Parks Marina to 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 exploring options for the redevelopment of the Niagara Parks Marina, with the goal of seeking private sector investment to redevelop the site. The Marina has been the subject of multiple redevelopment processes in the past which have not produced any results or change at the site. Current slipholders as well as the general public will need to be notified and engaged on the project.
Risk Category	Operational: • Financial • Project/Initiative Management • Infrastructure • Business Continuity • Third-Party/Procurement Strategic: • Reputation
Existing Controls	Business Case completed by KPMG; Extensive consultation process with municipal stakeholders, Infrastructure Ontario (previously), specialists in market sounding; Internal capital reserves reallocated for marina upkeep / maintenance until redevelopment.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	Niagara Parks has engaged KPMG to develop the business case for the potential redevelopment of the Marina; Potential RFP would include specific project goals, timelines, relevant studies and reports, mandatory requirements of the design and required approvals.
Target Mitigation Dates	Niagara Parks is aiming to launch the redevelopment process in 2025-26.

Risk 4	
Objective	Protect Niagara Parks' systems, networks and data from cyber or digital attacks.

Risk 4	
Risk Factor	Cyber threats and digital attacks aim to access, change, or destroy sensitive information, extort money from NPC or disrupt business operations. Such attacks can result in business interruption, financial losses and 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. 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 Controls	The Niagara Parks Commission employs a comprehensive security strategy that includes Next-Generation Firewalls (NGFW) with machine learning-powered threat detection, geo-blocking, threat intelligence data analysis, encryption analysis, and firewall policies. Endpoints are secured with an Extended Detection and Response (XDR) platform that uses machine learning and behavioral analytics to detect and respond to sophisticated threats. Security checklists are in place for new SaaS providers and Internet of Things (IoT) devices. Network access is secured by third-party multi-factor authentication for staff and partners. The organization has passed the rigorous PCI-DSS security compliance audit and continues to educate staff on phishing, social engineering, and cybersecurity threats.
Risk Assessment (Residual)	Risk Likelihood: Possibly (3) Risk Impact: High (4)
Risk Rating	Medium – High (12)
Mitigation/ Action Plan	In addition to the regular IT controls, IT staff has undergone cybersecurity training and is planning third-party cybersecurity audits in 2025. These audits will guide further investments to enhance the protection of digital information against cyber threats.

Risk 4

Target Mitigation Date Ongoing

Risk 5

Objective Oversee the restoration of the historic power stations on Niagara Parks property including the private sector redevelopment of Toronto Power with a long-term lease arrangement and future potential redevelopment of Ontario Power Generating Station.

Risk Factor Redevelopment of Toronto Power and/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 in 2006, they were mothballed with provisions for approximately 20 years to facilitate potential redevelopment. That timeline is coming to an end.
For Toronto Power, following a three-stage public procurement process, a proponent has been identified and a lease agreement finalized with Toronto Power Hotel Inc. for the redevelopment of the site. The project will be an over \$200 million investment to restore a heritage building into a brand-new visitor experience. As with any largescale redevelopment of a heritage property, there is the possibility of unforeseen factors that could challenge or delay construction. The project has also garnered media attention, which has been positive to date. For Ontario Power, Niagara Parks will continue to explore options for its redevelopment through private sector investment.

Risk Category Operational:
 • Financial
 • Infrastructure
 • Third Party/Procurement
 Strategic:
 • Reputational

Existing Controls For Toronto Power: Comprehensive communications plan developed including key messages, draft Q&A, media protocol; Experienced spokespersons to handle media interactions; Ongoing collaboration and communication with Ministry and Minister's Office staff; Final lease agreement signed that outlines 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)

Risk 5	
	to carry out heritage studies, archaeology assessment, environmental assessment and consultations; Strategic Conservation Plan will guide heritage restoration; 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. For Ontario Power: Future procurement will follow all required guidelines including review by a fairness monitor and external legal and financial advisory services, as required; Ongoing collaboration and communication with Ministry and Minister's Office staff.
Risk Assessment (Residual)	Risk Likelihood: Possible (3) Risk Impact: Moderate (3)
Risk Rating	Medium (8)
Mitigation/ Action Plan	For Toronto Power: All elements of due diligence phase completed by proponent, including public consultation and development of Strategic Conservation Plan; Final approval secured by the Government of Ontario via an Order-In-Council; All communication on the project to be guided by a comprehensive Communications Plan to ensure consistency and promote awareness among the public, media and stakeholders in support of the project.
Target Mitigation Date	For Toronto Power: lease agreement has been signed and approval granted by the Province; Construction planning will begin in the fall of 2024; Three-year construction period; Grand opening in 2028.

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

Risk 6	
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 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 skilled staff.
Risk Statement	Significant skilled labour shortages in the tourism, 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 overall turnover for our fiscal 2024-25 season of 30%, excluding normal attrition, impacting our food services (40%), custodial services (20%). 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

Risk 7	
	fiscal year. In 2024-25 Niagara Parks saw an increase in visitation to the prior year, requiring an increase to headcount to approximately 1800, which equated to 959 FTE. Challenges to attract and retain skilled staff impact managers' ability to adequately staff their locations, 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 screening and employee experience • Retention and engagement • Targeted recruitment campaigns for skilled / 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, 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	Potential delays in construction could result in unplanned financial losses. Once open, low attendance could result in inability to meet revenue projections.

Risk 8	
Risk Statement	Niagara Parks will be investing \$25 million of its earned revenue to develop a brand-new new Flying Theatre attraction to be located at its flagship building, Table Rock Centre. Niagara's Fury closed in September 2024 and the new Flying Theatre attraction is scheduled to open in the summer 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 unplanned financial losses and reputational damage if Niagara Parks is not able to maintain its timeline. Additionally, the new attraction will require a strong launch to generate interest and build demand so that the attraction can meet its revenue projections.
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 has already been completed; partner Brogent Technologies is a leader in their industry; internal project team is working closely with project partners including FORREC attractions consultant, Great Lakes Studios and general contractor Merit Contractors Niagara on all elements of the attraction development (construction, media development, operating plan); Three-phase launch plan developed based on learnings from the recent launch of the Niagara Parks Power Station + Tunnel to generate interest, build awareness and demand; Communications and Marketing Plan developed outlining key media opportunities and budget to promote the attraction.
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.; the internal project team is in regular communication with all relevant parties for the development of the key components of the attraction including film production, pre-show thematic design, etc.; the three-phase launch plan includes key milestones such as announcing the name and opening date of the attraction, hard-hat tours with media and grand-opening events.
Target Mitigation Date	Construction period (Sept 2024 – August 2025); Film production is complete; Media development for pre-show areas underway; Planned grand opening of new Flying Theatre attraction in summer 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 5,000 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 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)

Risk 9	
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.

11.0 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 2025-26, the overall key initiatives for Human Resources and

- **Recruitment, Retention and Engagement:** While participation in the labour market is up from 2023, ongoing skill gaps exist for the tourism and hospitality sector. Niagara Parks formed a Talent Acquisition and Retention Committee and Plan to respond to the shifts in the labour market. The Talent Acquisition and Retention Committee (TARC), comprised of Human Resources and Front-line management, focuses on diversifying and exploring 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 2025-26.
- **Operational reviews:** Continuing operational and functional reviews of business units and departments to determine further efficiencies within the organizational structure.
- **Contract negotiations:** One collective agreement representing our employees expires in 2025: The OPSEU Local 217 Police Agreement, expiring October 31, 2022, remains in conciliation. WUCC Local 2347 Server agreement expires December 31, 2026.
- **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 existing technologies to find administrative efficiencies and make data-based decision making.
- **Mandated training:** Increasing learning and development opportunities for new and existing employees in accordance with legislative requirements, including AODA and Occupational Health & Safety Act as well as Equity, Diversity and Inclusion.

Talent Acquisition and Workforce Planning

For the 2025-26 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 continues to engage the Talent Acquisition and Retention Plan and Committee in response to changing demographics and labour trends in the tourism, retail, hospitality and food services sectors. As Niagara Falls is a major tourist destination, competition for talent, particularly with private sector corporations, who have the ability to offer financial and other incentives to



potential candidates, remains a concern. Niagara Parks is positioning our brand as a focal point of recruitment and retention.

Niagara Parks continued to experience significant turnover for fiscal 2024-25 season of 30%, excluding normal attrition, mainly impacting our food and custodial services departments. The high turnover leads our recruitment strategies to target hard-to-fill positions and retention of incumbents. The Talent Acquisition and Retention Plan and Committee is designed to meet the following objectives:

- Expand talent sourcing creating regional pipelines.
- Target recruitment for specialized/skilled and hard-to-fill positions
- Diversify workforce, reflective of Niagara Parks visitation demographic and the surrounding community.
- Create strategic partnerships with institutional and community stakeholders.
- Lead recruitment with the Niagara Parks brand
- Enhanced candidate screening and employee experience

As part of Niagara Parks' strategic plan, the Talent Acquisition and Retention Plan and Committee was developed in recognition of changing demographic and labour market trends and to expand on Diversity, Equity and Inclusion initiatives. These initiatives include the diversification of our workforce, a focal point of the Talent Acquisition and Retention Plan and Committee with a goal of:

- Source candidates across levels of education, geography and employment history
- Create relationships with underrepresented groups and community organizations
- Ensure candidate evaluation is based on skills and potential

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

Niagara Parks has continued the data-based workforce planning initiatives to guide staffing levels which commenced in fiscal 2021-22, and will continue in the foreseeable future. The focus will remain on front-line service delivery, redeployment and training, retention and engagement and continued identification of administrative efficiencies across the organization.

In fiscal 2019-20 prior to the COVID-19 pandemic, 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.

As an operational enterprise agency, Niagara Parks normally has significant fluctuations in its seasonal and student complement throughout the fiscal year based on visitation levels. In 2024-25 Niagara Parks introduced new and refreshed guest experiences, including the Table Rock Bistro +

Wine Bar and Whirlpool Pub + Lounge, as well as extended hours of operation. Combined with a rise in visitation and demand on services, the headcount returned to pre-pandemic levels.

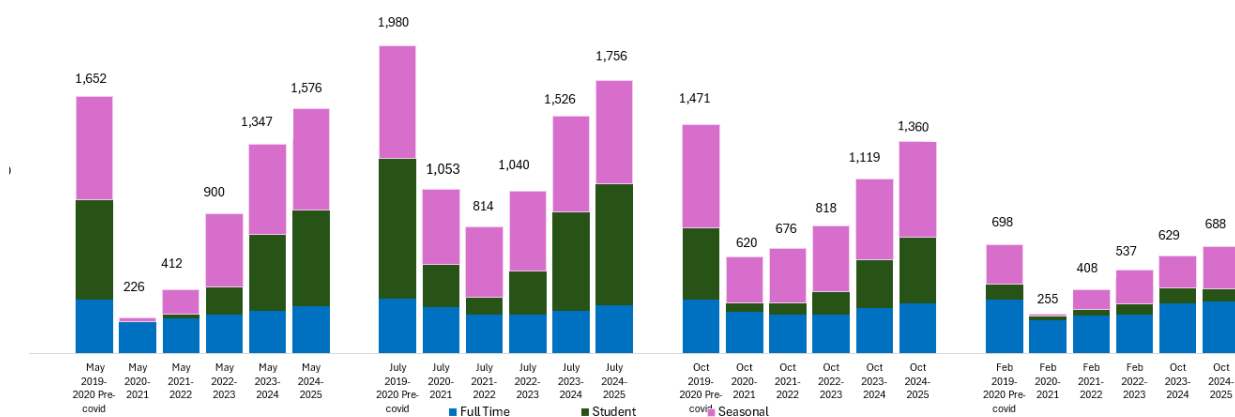
FTE complement by workforce category for Fiscal 2024/2025 includes:

Workforce Category	FTE	Workforce Category	FTE
Executive	4	Union Seasonal	387
Management/nonunion	189	Union Part Time	47.5
Contract	1	Student nonunion	551
Union Full Time	209	Student Union	33.6

With the opening of a new attraction in 2025 and planned improvements to existing attractions and experiences, there is an expectation of increased staffing requirements, particularly when turnover is factored in. As Niagara Parks experiences an increase in visitation and revenue, the high turnover in our culinary and custodial departments continues to have implications on staffing operations. Additionally, recruitment for specialized and professional positions continues to be a challenge. Given the highly seasonal nature of Niagara Parks operations, attracting and retaining talent in a seasonal operation is a complicated initiative.

Despite these challenges, it is positive that the organization has returned to pre-pandemic staffing levels. Table 6 below shows a comparison of staffing levels (headcount) for similar pay periods in fiscal 2019-20 through to fiscal 2024-25, and Table 7 shows the projected wages and benefits paid per quarter, for the current and prior year.

Table 7 - Number of Employees Paid: Fiscal 2019-20 versus Current Year (2024-25)



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



For 2025-26, Niagara Parks relies on the workforce plan, reflecting growth in visitation and revenue and the seasonal nature of operations. As a result, the forecasted FTE count for 2025-26 and 2026-27 is expected to increase in accordance with business operations.

Service Delivery and Administrative Efficiencies

In 2024, 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. This includes a new Applicant Tracking System and Performance Management module through Niagara Parks' payroll provider. This included the creation of a database for pension and benefit efficiencies and reporting to meet retroactivity and vendor reporting requirements.

Niagara Parks continues to focus on core elements of Human Resources to streamline and enhance service delivery and reporting and is undergoing the review of a Human Capital Management System for Human Resources and Payroll Integration and process automation.

Labour Relations and Employee Engagement

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

Niagara Parks is committed to a strong working relationship with its Union counterparts through early communication of initiatives and a shared goal of improving working conditions and employee engagement.

Resulting from COVID-19 implications, staff events were suspended at Niagara Parks in 2020-21 and 2021-22. Starting in fiscal 2022-23 and continuing in fiscal 2024-2025, 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 an 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 2025-28.

Learning and Development

Niagara Parks continues annual orientation and refresher training each season for new and existing staff. As a seasonal operation it is critical to provide orientation and refresher training to returning employees, including regulatory and legislative requirements and Equity Diversity and Inclusion training for all staff. The above noted mandatory training was completed for 2024/2025 fiscal and will continue for the 2025-26 season as employees return from seasonal layoff and new employees are 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.



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:

Technology Enhancements through Fiscal 2027/2028

- Facilitate data-driven decision making to align and support changing business requirements.
- Leveraging AI and data to enable HR to focus on strategic insights and drive superior customer services
- Organizational review of HR systems (HCM) and integration with business processes.
- Self-Serve enhancements for staff.

Learning and Development

- Implementation of Equity, Diversity and Inclusion program
- Development initiatives and upskilling for staff
- In conjunction with front-line operations, focus on Guest/Customer Service Training program

Talent Acquisition

- Advance the Talent Acquisition and Retention Plan to respond to changing labour market trends.
- Continue to align changing organizational needs with the workforce plan, and 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

12.0 Information Technology and Electronic Service Delivery Plan

From 2025 to 2028, the Information Technology (IT) division is dedicated to enhancing the business landscape of Niagara Parks by strengthening the infrastructure and connectivity of our sites and attractions. We will improve cellular and WiFi services, including enhancing outdoor WiFi and public cellular services, leveraging the NPC fiber network to ensure better connectivity for NPC guests, and stakeholders. This positions Information Technology at the forefront of digital service delivery across Niagara Parks.

To meet evolving business demands, the IT team will collaborate with internal departments and external stakeholders to improve existing applications, acquire new software solutions, and develop in-house applications. A key focus will be on advancing network and data security measures, ensuring compliance with the Payment Card Industry Data Security Standards (PCI-DSS) to protect the sensitive payment card data of NPC visitors.

These goals will be supported by our Information Technology policy framework that provides guidance to the IT team. This framework supports the three core areas within IT: Network and Infrastructure Services, Application Services, and Client (Helpdesk) and Infrastructure Services.

The following summary highlights our IT achievements in the 2024-25 fiscal year and outlines our strategies for the 2025-26 financial period.

Network Services

The 2024-2025 Network Services accomplishments reflect our commitment to enhancing security as the NPC enterprise network expands to meet business demands.

- Equipped the WEGO buses with cellular-based firewalls to enable real-time ticket scanning and reporting.
- Deployed a Starlink satellite at the new Queenston Heights work location of Niagara Parks' Education team, along with the setup of telephony, printers, and related peripherals.
- Deployed a satellite solution at the Butterfly Conservatory for the parking provider, enabling digital payment processing and enhancing convenience for guests and visitors.
- Decommissioned the Hilton Point-to-Point radios, achieving cost savings by leveraging NPC's own fiber network.
- Renewed maintenance and Wildfire "threat intelligence cloud" subscriptions for 15 Palo Alto firewalls, strengthening our defense against malicious access attempts.
- Delivered staff training on Phishing, Social Engineering and PCI-DSS standards.
- Developed the 2024 NPC Cybersecurity Report.



Application Services

Application Services made significant progress in delivering more applications while enhancing security and achieving PCI-DSS certification by a Qualified Security Assessor in 2024:

- Updated the School of Horticulture's digital tools for students by implementing Microsoft 365 educational products and licenses.
- Implemented Single Sign On (SSO) on all instances of the Unit4 ERP solution. Single Sign On streamlines user authentication by allowing individuals to access multiple applications with a single login, enhancing security and improving the user experience.
- Replaced 91 near end-of-life payment processing pin pads to enhance security for sensitive customer data and reduce the risk of potential breaches.
- Developed the Golf All Access Pass management system for managing golf passes.
- Developed a mobile app for Vehicle Reservations to track communal vehicle usage.
- Developed automations between ADP and Active Directory to automate network system administration.
- Successfully completed a Payment Card Industry Data Security Standards (PCI-DSS) audit and achieved certification from a Qualified Security Assessor (QSA) at a leading regulatory compliance and cybersecurity firm.

Client Services (Helpdesk) and Infrastructure Services

In 2024, Client Services received an average of 452 help requests monthly. In addition to this critical service delivery to employees, the following achievements emphasize IT's commitment to enhancing efficiency, improving productivity, while remaining vigilant against cyber threats.

- Conducted the 2024 annual Information Technology Risk Assessment, which is essential for identifying vulnerabilities and ensuring the security and resilience of our IT infrastructure.
- Implemented multi-factor authentication for IT access to the NPC virtualization solution, enhancing access controls for the Windows server farm.
- Enhanced safety at Niagara Parks Power Station (NPPS) by installing CCTV cameras, call stations and upgrading the IT infrastructure for digital lighting.
- For the new Popcorn Wagon site, established the IT infrastructure, the new mobile POS system, peripherals, and payment processing pin pads.
- Installed new time clocks at Whirlpool Golf and the Marina to improve efficiency and productivity.
- Installed seven new kitchen displays at Table Rock and Grandview restaurants to enhance kitchen efficiency and productivity.

Plans for 2025-26

Network Services

- Enhance outdoor Wi-Fi for guests and stakeholders by adding infrastructure and access points between the Floral Showhouse and Oakes Garden Theatre meeting the expectation for robust internet connectivity.
- Improve cellular services at the Table Rock Complex by installing a digital antenna system throughout the facility, ensuring that NPC guests have reliable access to communication and information during their visit.
- Collaborate with a cellular hosted services provider to install monopoles at select strategic locations to enhance cellular service for guests, visitors, and The Niagara Parks Commission stakeholders.
- Develop a fiber network loop between the Table Rock Complex and the Queen Victoria Place sites to provide an alternate path for network traffic and reduce the risk of business interruption.
- Design and build the network infrastructure for the new Information Technology Data Center at the Maintenance Center.

Application Services

- Modify the Accesso ticketing system to accommodate WEGO bus ticketing.
- Develop configuration and reporting to meet business requirements.
- Replace the near end-of-life Accesso attraction ticketing POS systems to ensure reliable performance and secure transactions, ultimately enhancing the guest experience and operational efficiency.
- Replace select guest-facing receipt printers, barcode scanners, and ticket printers before the next season to ensure reliable performance and enhance the overall guest experience.

Client Services and Infrastructure

- Develop the infrastructure and fiber network path to support the backhaul for the new cellular service monopoles, ensuring robust data transmission that enhances connectivity and overall guest experience.
- Procure and implement a Storage Area Network (SAN) for the Maintenance Center, IT Data Center.
- Develop specifications, procure, and configure new hosting servers for the virtualized server environment, which allows for efficient resource management, scalability, and improved system reliability.
- Replace end-of-life switches in key locations to ensure network reliability and security, while maintaining the latest patched operating systems to protect against vulnerabilities.
- As part of the IT five-year attrition plan, we will assess and replace desktops and laptops older than five years to enhance productivity and minimize the risk of business interruption.

13.0 Inventory of the agency's artificial intelligence (AI) use cases

In 2024, Niagara Parks established internal guidelines regarding the use of Generative Artificial Intelligence (Gen AI). These internal guidelines reflect established best practices and provincial guidelines and support the protection of individual, business, and organization data by reporting Artificial Intelligence uses and actively managing data and cybersecurity.

In 2024, through its Guest Services Centre, Niagara Parks introduced a programmed ChatBot function during peak ticket volume times which assisted in quick responses to standard questions from guests. Regularly assessed and updated, the new ChatBot is also helping to divert common queries away from less efficient reporting channels, optimizing organizational capacity and directing Guest Services resources to priority areas.

In alignment with the Responsible Use of AI Directive, guests are prompted that the chat function is managed by an automated Bot. Guests are also prompted to participate in a satisfaction survey for guests who engage with the new ChatBot in order to better understand guests' experience and improve customer satisfaction.

Title of the AI use case and/or category of AI use case (e.g., chatbot):

- Chatbot through the Zendesk system managed by Niagara Parks' Guest Services Centre

A description of the AI use case, including its intended purpose, relevant terms and definitions, and the business problem it addresses:

The Zendesk AI Chatbot allows Niagara Parks' Guest Services Centre to more effectively and efficiently manage high demand of incoming guest inquiries through Niagara Parks' website. The chatbot is able to resolve simple guest questions and in the case of more complex questions, the conversation then transfers to a live agent. Upon transfer, the bot provides full context of the guest engagement with the agent including previous messages and previously visited pages. As a result, the AI chatbot streamline workflows, helps to reduce agent workload, and increase operational efficiency with complete visibility.

The name of the area within the provincial agency who is responsible for the AI use case.

- Niagara Parks Guest Services Centre

A high-level description of how the AI use case benefits Ontario and how ongoing monitoring, risk assessment and mitigation plan, human oversight and assessment of the potential impacts on communities, people, and/or the environment is occurring:

- Utilizing the AI Chatbot feature in Zendesk enables the Guest Services team to communicate with guests and residents more effectively and efficiently by providing direct answers to simple FAQ style questions and by providing context for more complex questions that are passed to an agent. This increase in efficiency ensures that all guests contacting the Guest Services team receive the best service possible.



- The AI chatbot is a rule-based chat bot, **not** a generative AI chatbot, meaning that all responses provided to guests are created by the Niagara Parks Guest Services team and are not fabricated by the bot. This ensures that all messaging is approved and cohesive with our overall messaging tone and brand. While not currently in use, the bot does have limited Generative AI capabilities in that it can create a response based off of articles written by the Niagara Parks Guest Services team in the pre-populated Knowledge Base. Although not currently in use, if this were to be deployed in the future, all information compiled by the bot would again be part of approved language from within Niagara Parks.

A high-level description of the datasets used by the AI use case, including whether any personal information was used and how it is being protected:

- Each ticket in the Zendesk system used by the Guest Services Team to track guest interactions is composed of multiple data storage objects. For example, a ticket is composed of metadata, and then depending on what's included in the ticket, a number of additional data storage objects such as attachments, events, tags, etc. When guests start a conversation with the AI Chatbot they are not required to input any additional data. If they opt to communicate with a Guest Services Agent, only then do we require a name, email address, and note with an optional box to select service in French or English.
- Service Data processed by Zendesk AI is subject to all security standards and commitments, including compliance with Zendesk's robust Enterprise Security Measures, and storage within Zendesk's SOC 2-compliant environment.

In 2025-28, Niagara Parks will abide by all relevant provincial legislation while continuing to explore opportunities for the further use and integration of artificial intelligence across Niagara Parks, in order to optimize organizational capacity, support data-driven decision making, and simplify client/customer interactions by improving the accessibility of key services and attractions.

14.0 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 (2019) 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.

The Ontario government has approved the lease agreement between Niagara Parks and Toronto Power Hotel Inc. for the private sector redevelopment of Toronto Power Generating Station. Pre-construction planning began in late fall 2024 and the construction period will continue into 2028.

Throughout 2025-28, Niagara Parks will continue to work closely with the Ministry seeking approvals as required to implement the following land transaction initiatives:

- Future redevelopment of Ontario Power Generating Station
- 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 low-lift pumping station.
- Development of potential land lease agreement for the Visitor Transportation System

Niagara Parks Marina

Niagara Parks will be exploring options for the redevelopment of its marina property along the south Niagara Parkway, which is the only marina on the Canadian side of the upper Niagara River. The site is comprised of three components including eight acres of marina lands, a 5-acre shoreline and a 47-acre vacant land asset. Niagara Parks has engaged a consultant to develop a business case to support the redevelopment opportunity. This redevelopment opportunity will be further explored throughout the 2025-28 business planning cycle.

15.0 Initiatives Involving Third-Parties

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 are 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.
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. NFT is also supporting NPC's environmental stewardship program by providing funding to plant 1100 trees in the park as part of the RendezVous Canada conference being hosted in Niagara Falls in 2026.
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 Digital and Photo Capture Services. The service captures photos of guests at Journey Behind the Falls, Niagara City Cruises, Niagara Parks Power Station, White Water Walk and Butterfly Conservatory.	Operations are planned for implementation at the new NPC Flying Theatre attraction.

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 began 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. This initiative has now grown to year-round service.
District School Board of Niagara and Niagara Catholic District School Board	Co-op education placement in Niagara Parks culinary venues More hands-on, experiential learning opportunities for students	Supports tourism as an opportunity for employment and assists in recruitment Niagara Parks provides place-based learning opportunities related to natural and cultural heritage
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.

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	Provide expertise for various environmental, recreational and technical programs to support Niagara Parks' stewardship programs.	Provide NPC staff with valuable data and natural area management strategies through Niagara College's Ecosystem Restoration Program. NPC also provides place-based and hands-on learning opportunities to students related to ecosystem restoration.
Brock University	Provide expertise for various environmental, recreational, cultural and technical programs to support Niagara Parks' stewardship programs while providing students with real-world experiences.	Signed new Memorandum of Understanding in 2024 to expand the partnership into other NPC business units and departments at Brock University, including earth sciences, environmental sustainability, cultural heritage, arts and Indigenous studies.
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, Ducks Unlimited Canada, Friends Groups, Naturalists, 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.

Vineland Research and Innovation Centre	Provides expertise on the management of NPC's forest canopy	Through Vineland's soil health analysis program, guides NPC's tree species selection and soil amendments to improve tree planting survival. Investigating opportunities to develop micro forests and food forests to expand NPC's forest canopy.
Niagara Peninsula Conservation Authority and the Niagara River Remedial Action Plan	Contributes to the preservation and enhancement of water quality and environment of the Niagara River corridor and adjacent lands	Collaboration provides expertise and support for water quality improvement and ecosystem restoration initiatives. As a delivery agent of the Canada – 2 Billion Trees Program, NPC provides financial support and expertise towards tree planting and seed collection at Niagara Parks.
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.
Ontario Invasive Species Centre	Research in management and control of invasive species.	Provides financial support and best management practices for a wide-range of current and future invasive species threats such as Tree of Heaven and Spotted Lantern Fly. Also conducts monitoring of invasive species on NPC lands.

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. Also collaborate on the stewardship of adjacent natural areas and the creation of fish habitat within the Niagara River. In 2023, Niagara Parks entered into an agreement with Parks Canada to allow WEGO transportation access on their lands and to sell a joint "Heritage Pass" offering admissions to both Niagara Parks and Parks Canada sites along the Niagara River Corridor.
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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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

16.0 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 2025-28 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. The Communications and Marketing team will be responsible for delivering the successful launch of the new flying theatre attraction in 2025 between both paid and earned media opportunities, as well as executing on-site grand-opening and media events. 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

- Position the new flying theatre attraction as a must-see experience for all guests visiting Niagara Falls.
- 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 drivetime US markets which have been responsible for a majority of visitation and collections at Niagara Parks over the past two years.
- 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 update dedicated stakeholder lists for all relevant departments.
- 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 2025-28 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.