



An International City

Discussion Paper

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The Planning Partnership + Nethery Planning

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1

An Introduction to “Our Niagara Falls Plan”

The City of Niagara Falls is creating a new Official Plan - “Our Niagara Falls Plan,” a long-term vision to 2051 that guides us through a future of unprecedented growth while providing a high-quality living experience for our residents and our visitors from around the world.

The Official Plan is a high-level, visionary document that guides and shapes the future of a community identifying where, and under what circumstances, specific types of land uses can be located. The Provincial *Planning Act* requires that all local public works projects, official plans, zoning by-laws, related amendments, and all future development must conform to an approved Official Plan.

Our Niagara Falls Plan is going to define a vision for the City to 2051 - how we are going to create a complete community

Our Niagara Falls Plan will serve a broad range of community and municipal objectives. In addition to establishing appropriate land uses, it also establishes the goals, objectives and policies related to all of the essential components of making and sustaining a complete community. It sets policy requirements on how to create attractive and livable communities with a variety of housing and employment opportunities. It specifies means to protect, conserve, and enhance the city’s cultural and natural heritage and agricultural land base. It identifies locations for new growth to make the most efficient use of land and infrastructure. It outlines the structure around parks and open space, and how to acquire and grow such spaces. It directs how to move

people and goods in and around a city. It details how to plan and provide for community needs such as schools, recreation centres and libraries.

It provides all of this in a way to ensure that Provincial and Regional policy is implemented, as required by law. To this end the Official Plan must conform to the Provincial Growth Plan for the Greater Golden Horseshoe and Niagara Escarpment Plan, and the Niagara Region Official Plan, and “consistency” with the Provincial Policy Statement. This is done while also providing the critical local context and input, to ensure implementation happens in the manner Niagara Falls intends it to occur, to address the unique needs of our community.

1.1 A Little Bit About Niagara Falls

Niagara Falls is an international landmark and destination for visitors, residents, businesses and employees alike. It is a high growth municipality, forecasted to take on the largest share of growth in Niagara Region over the next 25 years. Identified as one of Southern Ontario's 29 large and fast growing municipalities in the draft 2024 Provincial Planning Statement, Niagara Falls Council has pledged to build 8,000 new homes by 2031. It hosts two international crossings, the Rainbow and Whirlpool Bridges, with the major Queenston-Lewiston Bridge just north of the city limits—together, responsible for 3.6 million vehicle crossings in 2023.¹ It hosts a significant concentration of hydro-electrical generation facilities. The Niagara Parks Commission is a major partner agency in Niagara Falls, founded in 1885 and overseeing over 16 square kilometres of parkland and lands along the Niagara Parkway connecting Niagara-on-the-Lake with Fort Erie. Niagara Parks Commission facilities welcomed just under 3.0 million visitors from April 2022 through March 2023.²

Transportation Access. Niagara Falls is bisected by the Queen Elizabeth Way (QEW) freeway connecting Buffalo and the Niagara Region to the Golden Horseshoe, including Toronto. Highway 420 crosses through Niagara Falls to connect the QEW to the Rainbow Bridge border crossing. Intercity and international rail service is provided by Via Rail and Amtrak, with more frequent commuter rail and bus connections to Hamilton and Toronto via Metrolinx/GO Transit. In 2023, Niagara Falls Transit's fleet

was transferred to Niagara Region Transit, who also support paratransit service and connections between the cities of Niagara Region.

Landmarks and Attractions. In addition to the Falls themselves, Niagara Falls is a tourist destination, with multiple hotels, convention space, observation towers, multiple theme parks and resorts, and entertainment destinations across the City, including the bustling Clifton Hill area. The Niagara Parks Commission operates with a mandate to manage and develop the many public spaces along the Niagara River shoreline, including entertainment and recreational facilities. A short trip along the Niagara River Parkway brings guests past the Flower Clock, Botanical Gardens, Butterfly Conservatory, Niagara Glen, the former Toronto Power Generating Station, Spanish Aero Car, and Queen Victoria Park. The river itself is a feature, with the Iron Scow shipwreck and International Control Weir part of the falls environment. Away from the falls are the Gale Centre, Firemen's Park, The Exchange, and an emerging culinary scene. It is easy for local landmarks to be overlooked, which are as core and foundational to creating a sense of place as the all-day buzz of the tourist areas. The city is home to a branch of the Niagara Health Hospital network (Greater Niagara Hospital). The new South Niagara Hospital is being constructed with a targeted in-service date of 2029, creating an opportunity for a new purpose for the existing hospital lands.

¹ As reported by the Bridge and Tunnel Operators Association and [South Niagara Chambers of Commerce](#)

² [Niagara Parks 2022/2023 Annual Report](#)

Commercial and Recreation Amenities.

Niagara Falls is serviced with a full range of local shopping amenities. Niagara Square is a former indoor mall that fully completed a transition into a power centre format in 2020. It is located at the southwest corner of the McLeod Road interchange and the QEW. A similar cluster of large format commercial uses can be found in the middle of the urban area, at the intersections of Morrison Street and Dorchester Road. Other commercial nodes can be found along Lundy's Lane such as the Canada One Outlets, in the Stamford neighbourhood, and the historic Downtown Niagara Falls, north of the main tourist area. Local-level commercial blocks are found throughout the city.

A recent cultural development is the opening of The Exchange, a 10,000-square-foot indoor/outdoor multipurpose event space with gallery and working studio facilities. schedule farmers market and supper market events, bring a variety of interest to this new community space.

The Niagara Falls History Museum, Battle Ground Hotel Museum, and Willoughby Historical Museum cater to those interested in documents pasts and historic preservation.

Niagara Falls has the Gale Centre (four-pad arena), Willoughby Memorial Arena, and the MacBain Community Centre with an indoor pool, gym, and multi-purpose rooms.

There are four locations of the Niagara Falls Public Library.

The City is in Growth Mode. According to the 2021 Census of Canada, the population of Niagara Falls was 94,415, with 44,600 having reported being in the labour market. The City's current Official Plan was approved by the Ministry of Municipal Affairs on October 6, 1993. The 1993 Plan was written to guide growth to the year 2011 and a population of 83,000. The planning horizon was extended in 2014 (three years beyond the original target) to guide growth to the year 2031, with an anticipated population of 106,800 and 53,640 jobs. At 7.2% population growth between 2016 and 2021, Niagara Falls is on pace to exceed that 2031 population forecast. The city has completed a number of urban boundary expansions since 1993, with three new expansion areas added through the 2022 Niagara Official Plan. Niagara Falls is a growing and expanding community.

The Legislative and Policy Framework around Planning has Changed. Another major change since 1993 is the complete overhaul of the Provincial and Regional Planning Policy framework. There are new documents at both levels, whose directions need to be reflected in local policy. From an administrative perspective, the current Official Plan has been amended over 160 times over the past 30 years. The various edits have created an Official Plan with some internal conflicts and inconsistencies, duplications, some confusion in intent of policies—and, overall, an outdated planning vision that is in need of replacement.

1.2 Intent of the Discussion Papers and the Path to Our Niagara Falls Plan

To initiate the process of creating Our Niagara Falls Plan, the project team has prepared six “Discussion Papers”. These papers are about starting a conversation with the community about what the city will look like in 2051, what jobs will be here, how do we move in and around that community, how do we integrate nature and resiliency, how do we effectively manage growth and climate adaptation, and what infrastructure, features or amenities are needed for the community.

Community input is essential to delivering the Our Niagara Falls Plan. The Discussion Papers are intended to guide a conversation that will ultimately form the basis for policy.

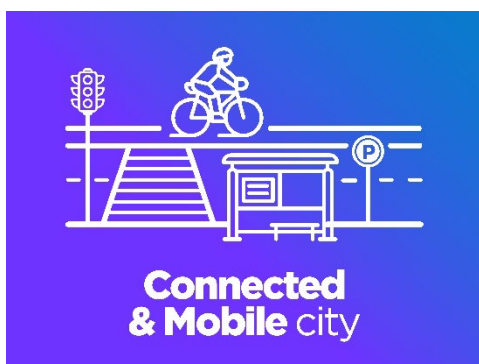
The Discussion Papers have structured several contemporary issues in land use planning in Ontario into digestible sources of information in six thematic areas:



1. **A Growing City.** Niagara Region’s 2051 Land Needs Assessment forecasts Niagara Falls to add the greatest number of new housing units in the Region, even more than St. Catharines and its large assignment of apartment dwellings. Further infrastructure master planning work can look at growth beyond the 2051 planning horizon, opening a door for even longer-term planning. This means a considerable outlay of infrastructure and soft services will be required to support the building of complete communities connected through a resilient, layered mobility network. The new Official Plan must also ensure the infrastructure is available (planned or existing) to accommodate this growth, and will either accommodate or be ready to accommodate the outcomes of the City’s range of ongoing growth management projects and planning, the housing pledge to 2031, urban boundary expansions, affordable housing goal, and volume of development applications.



2. **An Attractive City.** Niagara Falls is a gateway to our country and a destination in its own right. Growth will need to build upon this foundation—more accurately, it will raise the bar for excellence in design and architecture, even in a world where exterior design elements cannot be completely regulated through Site Plan Control. This is achieved by comprehensively identifying landmark locations where priority design treatment is expected, while leveraging further placemaking opportunities through planning for a complete community that contributes to health and civic pride.



3. **A Connected and Mobile City.** Communities are grappling with how and where goods and people move through them. In addition to needing to serve the vehicle demands, the transportation system of a city is also a public good. This means it contributes to the overall

quality of life for residents, contribution to the economic well-being for businesses, and supports tourists and visitors to the area. Key to this is designing a transportation system that is premised on the principles of safety, equity, accessibility, and mobility for all users and modes. Our Niagara Falls Plan will aim to address these questions and be complemented with street design policies and guidelines.



4. **A Green and Resilient City.** The effects of climate change are becoming known. Cities can and need to do more to prepare for and incorporate these new systems and patterns into growth and development. Whether that is through right-sized infrastructure, a comprehensive natural heritage system, low impact design techniques, sensitively designed community facilities, or increased expectations from private development, Our Niagara Plan should build upon City and Regional studies to incorporate the best elements in a manner that readies the community for adaptation to climate change. It must also consider the fiscal and economic implications of policies related to building a green and resilient city.



5. **An International City.** Our Niagara Falls Plan will incorporate design policies and community improvement principles and a framework for intensification that will maximize the opportunities for creating landmarks and physical presence at major locations to support the many places of entry to the city. Our Niagara Falls Plan needs to leverage its location, multiple attractions, and quality of life to continue encouraging tourism, new economic development, and a range of jobs to support overall well-being.



6. **A Cultural City.** Our Niagara Falls Plan will incorporate multiple goals, objectives, and policies to continue to build upon Niagara Falls' recent growth in diversifying cultural options. This is

more than just the Falls area itself and must incorporate the entire city, providing the places and spaces necessary for an enriching social experience. There is a strong base of significant cultural heritage resources at a local and national scale in Niagara Falls, for which Our Niagara Falls Plan can work to conserve. This also requires planning for and providing community facilities to support a growing population.

The six Discussion Papers together represent a thorough, comprehensive and interconnected approach to initiating this discussion about the future of Niagara Falls. Each Paper contributes its own piece to this project. A further paper on Planning Policy Conformity and Implementation will be prepared once current Provincial reform proposals are complete.

Project team staff are available at any time to answer questions about this project. All public input received will be summarized into a "What We Heard" engagement summary report throughout the process to prepare the new Official Plan.

1.3 Public Engagement So Far

This diagram illustrates the engagement that will be completed up to the end of June 2024. The following two pages summarize what we are hearing with respect to each one of the topics for discussion.



A Growing City

- The aim should be on growth that is orderly, cost-effective, and sustainable.
- Re-connect city's decision-making with the Official Plan.
- Planning priorities should be within the built boundaries
- Downtown should not be just for visitors - try to get people living in this area
- Plenty of room for growth south of McCleod near Garner South; Grassy Brook and Hospital site
- Tourist commercial across from residential – incompatible. Transition and buffer are important.
- Niagara Falls does not need densification: lots of space. Large number of rental units available, many houses for sale
- Should do more with what we have instead of taking over more green space.
- Need better facilities for residents, including those with addictions (e.g. shelters, long term treatment facilities)

“This city has potential to become a true beacon of education, natural beauty, job opportunities, and more. Niagara University seems like a good start, but one win after a mountain of disappointments means nothing if it leaves locals in the dust.”

- Diversify the local economy by drawing other industries beside tourism to the city
- Don't need more industrial parks but do need co-working spaces.
- Like to see something like University Village, Seattle: a shopping destination/village rather than large format shopping
- Currently, a lot of homeless, need single person residences; more apartments for baby boomers who give up their houses, and housing for seniors - but not stacked townhouses.
- Need to bring back good, permanent, year-round jobs - seasonal jobs contributing to local homelessness.

An Attractive City

- Niagara Falls is not the showcase I remember. We have to do a lot of work to do to bring us to a standard to welcome people back.
- Want to see better quality parks, cycling trails, no space between houses, more public places.
- Growth of short-term rentals causing issues in residential areas – needs some control.
- Niagara Falls has lots of beautiful parks – no complaints or recommendations, done a good job on parks.

“I hope for a city that focuses on keeping the city clean. There is a huge issue with litter - take a look at the side of major roads, off ramps, on ramps, and even city trails.”

A Green & Resilient City

- Love the McBain Centre – need more spaces like that where communities can gather.
- Green space very important, need to think about how to build urban green space as different kinds of landscapes. (Kansas City good model for green space revitalization.)
- Prefer planted medians – woodland boulevard is a great example of a suburban street, no bike lanes, but safe, with median with trees.
- Queen Street signs, sidewalks, - walking to Queen from e.g. Victoria library - walk is not good. Need to enhance the larger context.
- Planting street trees does not make up for removing a forest.
- Niagara Falls wetlands are mainly complexes, which should appear in the Official Plan. Mapping of natural corridors is key to their protection. Ideally, should be under public ownership (e.g. the Conservation Authority).

“In 2051, my Niagara will have many public gardens for its residents to grow vegetables annually, positively impacting the lives of those in low income neighborhoods and teaching a skill that is transferrable. Teaching people how to grow their own food could be life saving to those who cannot afford fresh produce.”

“Our watershed and forests, wetlands and all remaining green areas are our assets to protect...Our Official Plan must reflect our respect, appreciation and gratefulness of being blessed with these magnificent natural features.”

- Need better language in the Official Plan about our remaining natural areas and woodlots to make environmental protection enforceable.
- Would like to see public gardens/vegetable gardens replacing some of the lawn area in parks

A Mobile & Connected City

- Niagara Falls should think about light rail transit as well as GO. The only semi-good public transportation are the WeGo buses, which almost exclusively serve Niagara Parks and the tourist districts.
- Need different measures to slow traffic, without speed bumps and stop signs.
- Investigate a new people mover system, LRT using CP rail corridor, and connect to train station.

“Niagara Falls 2011 Active Transportation Plan was to develop a robust bike lane network in the city. Looking back on this document in 2024, so few of these plans and ideas have actually been completed.”

- Traffic is bad. Roads to be expanded: Dorchester, Drummond, Thorold Stone Road - easily expanded, use their wide boulevards to create 3 lanes.
- Regional Transit system has resulted in a lot of vacant buses. Not getting value for money.
- Clifton Hill on a summer day - lots of people walking but not enough space. Need bigger, accessible, sidewalks, bike, and electric scooter rentals. (Kitchener Waterloo is doing a good job integrating cars, rentals, walking.)
- Stanley is another street that can be better planned, now a mini highway - opportunity for a better sidewalk connection.
- Lots of bike lanes that just stop. Love to see city with specific requirements for new build areas, things to make areas more pedestrian friendly, including bike paths through new builds/shopping areas.

An International City

- Niagara Falls is tourist town, but that's what makes the region unique. The city has "a community vibe" and whatever tourists use, locals will use.
- Transit issue: tourists don't have change; need better signage re: presto, no cards, cash.

"One thing Niagara Falls needs is an environment that attracts foreign visitors who want to slow down and enjoy the scenery. Bring some European style culture to Niagara Falls. NPC owns lots of land and they can designate areas for cafes and sit down space looking out over the falls or just as people walk about on the grounds. Let's make the Falls area not just a viewing opportunity but a refreshing experience."

A Cultural City

- Niagara Falls does not seem to care about history – razed historic neighbourhoods, demolish heritage-designated school to expand cemetery.
- Public buildings need to be maintained. The new Exchange location is not good and took away parking at the corner of Main and Central.

"Find out what features make us stand out from other cities around the world. Highlight the features that make the city worth traveling to. This can include unique cultural activities, historical landmarks, diversity welcoming places and cultural foods, different museums unique architecture, streets, and also attractive game zones for visitors."

"Let's spend less on fireworks and more on feeding Niagara's families. Let's make the city more fun and inviting for all with cultural events and attractions such as a state of the art children's museum, aquarium, theme park, hockey team, indigenous events, etc."

2

An International City Overview

2.1 What is an International City?

Niagara Falls remains a major tourist and convention destination for the entire world. The Eighth Wonder of the World and a star of many movies, television hits, and spectacles of all types, Niagara Falls is renowned as an important part of the cultural landscape. Its effect goes beyond the city, extending along its similarly named Escarpment north toward Wisconsin and eastward into New York State.

Niagara Falls is also home for industries and is part of a “Gateway Economic Zone” (as identified in the Growth Plan for the Greater Golden Horseshoe) planned to support, “economic diversity and promote increased opportunities for cross-border trade, movement of goods, and tourism.” \$93 billion in trade crosses Niagara’s border with the United States, and border-related truck traffic is forecast to increase by 50% over the next 25 years.³

There are only a handful of places in the world with similar levels of global awareness as the Honeymoon Capital of the World. It provides an advantage to creating a world-class place to live, work and play.

2.2 What Makes Niagara Falls an “International City”

Niagara Falls is an “international city” with respect to tourism and an emerging international city for business development owing to its “gateway” location to the United States.

As a tourism destination, Niagara Falls (Ontario) generates some 14 million visitors annually⁴ on its own and combined with Niagara Falls (New York), the region attracts some 22 million visitors⁵ making it one of the most visited attractions in the world. While visitation

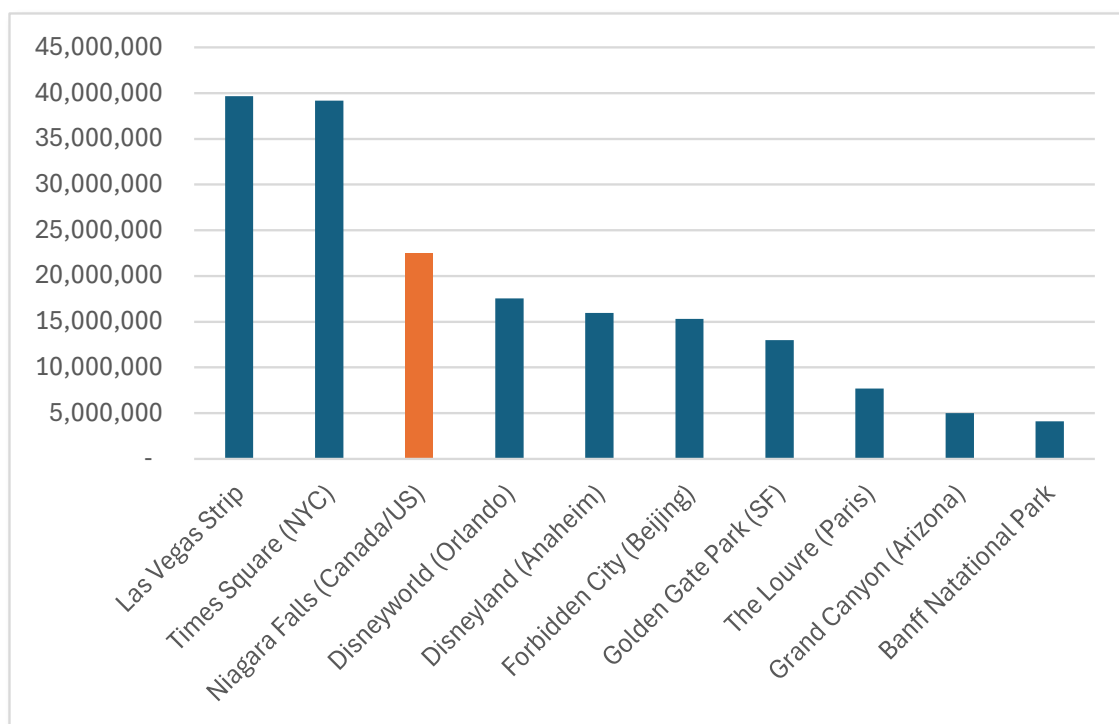
Our Niagara Falls Plan will incorporate land use, urban design and community improvement policies in a manner which allows the City’s non-residential components (its tourism sector, employment lands, and commercial uses) to evolve into the cornerstones for a truly international City.

³ Niagara Region 2022-2032 Economic Development Strategy p. 60.

⁴ Tourism Association of Canada: https://tiac-aitc.ca/cgi/page.cgi/_membership.html/148-niagara-fallstourism#:~:text=Niagara%20Falls%20hosts%20approximately%2012%20million%20visitors%20a%20year. Note: Figure is 2022 visitation to compare with other attractions. Current visitation as estimated in the Niagara Falls Economic Development Plan is 14 million.

⁵ Falls Guide: <https://fallsguide.com/over-20-million-tourists-visit-niagara-falls-each-year/>

statistics are difficult to verify, particularly for non-ticketed attractions, the graphic below shows that Niagara Falls draws visitors on par with or greater than some of the most iconic visitor attractions in the world—a top 3 world destination.



Annual Visitation at Select Tourist Destinations (Approx. 2022)

Sources: World Atlas, Parks Canada, Statistica, Le Louvre, explorethecanyon.com

Data from Niagara Region indicate that approximately one-third of visitors or 4.3 million persons visit the region from a country outside of Canada, again making Niagara one of the largest international tourism destinations in the world.

From a business development perspective, Niagara Falls is an emerging international city, building off several core strengths, including: its gateway location to the United States, its agricultural hinterland, its global recognition as a visitor destination, and major recent investments in its health care and academic sectors.

In addition, the 2024-2029 Niagara Falls Economic Development Plan describes its growing supporting business and academic infrastructure as an “entrepreneurial ecosystem” fostering key industrial sectors, including technology and tourism. Further, the Niagara Region 2022-2032 Economic Development Strategy notes the federal designation of Niagara Region as a Canadian Foreign Trade Zone owing to its five border crossings with over 1 million trucks crossing the border each year, as well as its water and air-based transportation connections⁶.

⁶ Niagara Region 2022-2032 Economic Development Strategy p. 13.

The 2024-2029 Niagara Falls Economic Development Plan⁷ concludes that:

“A valuable mix of natural resources, economic assets, and cultural and social diversity provides Niagara Falls with enormous opportunities to build on past successes and realize its potential as one of North America’s most dynamic and successful cities.”

2.3 Strengths, Weaknesses Opportunities and Threats to Niagara Falls as an International City

As identified in the Economic Development Plan, Niagara Falls’ principal strengths are its brand recognition, its location near major markets and its livability as a “family friendly city”. These strengths are partially tempered by its demographics, including income inequality which has, in part, been influenced by the pandemic, an aging workforce and lower rates of education in key sectors. For example, between 2019 and 2020, the City’s population saw significant decreases in employment income because of halted tourism activity. Workers in Niagara Falls were 56.7 percent more likely than other Canadians to lose 30 percent or more of their employment income⁸. As of 2020, close to half of City of Niagara Falls residents (46.3%) earned less than \$20,000 in employment income per year (among those receiving employment income). In comparison, in the same year (2020), only 34.0 percent of Canadians and 33.7 percent of Ontarians with employment income received less than \$20,000⁹.

The City of Niagara Falls has lower rates of formal education among its existing workforce compared to Niagara Region and the Province of Ontario.¹⁰ In addition, the share of Niagara Falls residents with an education in information, communications and technology related fields in Niagara Falls was below the national average, although above that of the Region¹¹. There were a significantly larger number of persons working in information, communications and technology support jobs in other industries than working for firms within the information, communications and technology industry itself¹². This may signify a potential supply of knowledge workers capable of bolstering growth in those sectors if jobs became available.

⁷ Niagara Falls 2024-2029 Economic Development Plan p. 5.

⁸ Niagara Falls Economic Development Plan, p. 48

⁹ Niagara Falls Economic Development Plan p. 48.

¹⁰ Niagara Falls 2024-2029 Economic Development Plan p. 52.

¹¹ Niagara Falls 2024-2029 Economic Development Plan p. 44.

¹² Niagara Falls 2024-2029 Economic Development Plan p. 44.

Niagara Falls had a slightly older population than the province of Ontario. However, the 65+ age group in Niagara Falls grew by almost 16 percent between Census periods (2016-21), while there was lower, or negative growth in the younger age cohorts¹³.

A slow growth rate of building construction was also experienced in the City during the height of the COVID-19 pandemic (2019-2021), although key projects (e.g., the Niagara South Hospital) continued to move forward during this time¹⁴.

Some of these weaknesses, however, are being addressed by recent investments in the educational sector, including the new University of Niagara Falls Canada, as well as the expansion of Niagara College in Niagara-on-the-Lake and Welland.

Competition from larger markets in the Greater Toronto Area and the United States, have been a perennial threat, but can be countered by expanding on the City's strong brand, and increased opportunities for remote home-work relationships, which have benefited communities with high degrees of livability.

Other structural threats, such as a shortage of serviced industrial land and affordable housing are both recognized at local and Provincial or national levels and are being targeted for new initiatives and investments. The forecasted truck traffic increased may potentially be affected without additional infrastructure or other operational planning to support the volume.¹⁵ The shortage of or less desirable siting of industrial land includes both lands in existing employment areas, some of which do not have direct accessibility and exposure to the expressway network, as well as the need to consider expanding the employment land inventory beyond the current settlement area boundaries (noting that the City did purchase the South Niagara Falls / Russell Aviation property in April 2024, advancing land assembly along the QEW corridor).¹⁶

The City's tourism sector has traditionally been its economic engine, and prone to cyclical trends. Some facilities are beginning to show their age or decline in cultural relevance. Plans are underway to provide additional diversity in tourism offerings and cultural connections to the broader community and into different market segments, such as the Power Plant projects by Niagara Parks. Multiple stakeholders have provided early feedback into this project looking to see "a world-class city" in Niagara Falls, supported through good design, enhanced mobility, cleanliness, infrastructure supports such as public Wi-Fi, and wayfinding and tourist support services. Many of these design elements are touched upon in the other discussion papers prepared for this project.

There remains a need for the City to increase its appeal to a tech-savvy and environmentally conscious generation heavily influenced by social media. In addition, feedback is required from the non-tourism sector to support a balanced investment strategy for both tourism and non-tourism projects.

¹³ Niagara Falls 2024-2029 Economic Development Plan p. 56.

¹⁴ Niagara Falls 2024-2029 Economic Development Plan p. 53.

¹⁵ Niagara Region 2022-2032 Economic Development Strategy p. 60.

¹⁶ https://www.niagarafallsreview.ca/news/council/niagara-falls-purchases-sodom-road-property-for-industrial-park/article_421776f2-bea6-5dde-9ed4-29a2668037aa.html

Niagara Falls has a tremendous opportunity to expand upon its international reputation but will require a concerted and focused effort to attract new investments by both government and the private sector.

It is also important to note that some of these threats and weaknesses are not unique to Niagara Falls, but are part of broader trends being experienced across the Province and across Canada (for example, the pace of construction and availability of associated labour). Issues such as the need to add more affordable housing should be addressed in concert with the City's Provincial and Federal partners. The same may be true with regards to the aging population, which ultimately will require additional services that may be beyond the means of many municipalities to provide without upper-level government support. Noting that not all these points may be unique to Niagara Falls, any solution must be addressed within a local context, recognizing solutions that represent the right fit for Niagara Falls.

S Strengths	W Weaknesses	O Opportunities	T Threats
✓ Globally Recognized Brand ✓ Gateway to the US ✓ Gateway to the GTA ✓ Livable City	- Over Reliance on Tourism - Lower Rates of Education - Slow Rate of Construction - Effects of Covid on Employment Income	+ Strong Entrepreneurial Spirit + Expanding a Strong Brand + Diversifying the Tourism Offering + Growing its Small Business Sector + Building Partnerships	○ Competition from GTA ○ Competition from US ○ Lack of Serviced Industrial Land ○ Lack of Affordable Housing ○ An Aging Population

Niagara Falls as an International City SWOT

Source: urbanMetrics inc. based on Niagara Falls 2024-2029 Economic Development Plan.

3

Key Topics for Discussion

3.1 Attracting Industrial Jobs and Positioning Niagara Falls as a Gateway Economic Zone

Why It's Important

Over the past few years, the industrial market in the Greater Golden Horseshoe and North America more broadly¹⁷, has been reported as having the strongest demand of any real estate asset class in the country. In fact, demand has been so high that industrial vacancy rates in the Greater Toronto and Hamilton Area (of which Niagara Falls is a part) have been driven to record lows, outpacing other major North American hubs like New York, Los Angeles, San Francisco and Chicago, as large companies are consuming large blocks of space. These conditions have led to increasing land values, and growing employment land supply shortages across Southern Ontario creating optimal conditions for the pre-leasing of new space under construction.

The 2024-2029 Niagara Falls Economic Development Strategy is based on a strategic approach to economic diversification and cluster development, relying on four strategies or “pillars”.

- **Diversifying the Economy.** This involves the tourism, advanced manufacturing, ICT and health care sectors, including the development of new business parks and the intensification of existing parks, and the diversification of its tourism offering, including the use of new technologies.
- **Retaining and Growing Existing Businesses.** This involves supporting, encouraging and enabling the growth of multinational enterprises and small and medium sized businesses.
- **Strengthening the Economic Ecosystem.** This involves the development of anchor institutions and the facilitation of partnerships between the business community and government, educational institutions, Niagara South Hospital, and other organizations.
- **Expanding Niagara Falls.** This involved increasing and intensifying physical spaces, such as business parks and facilitating the redevelopment of surplus or at-risk sites, such as Marineland. The strategy also involves targeted investments in infrastructure, such as transit and broadband access, the expansion of the Niagara District Airport, and the revitalization of the downtown.

¹⁷ The geographic area identified as the Greater Golden Horseshoe growth plan area in Ontario Regulation 416/05 under the [Places to Grow Act, 2005](#). It includes the municipal areas stretching from the Niagara Region to Durham Region.

One of the greatest challenges for Niagara Falls and the Region as a whole, however, is a limited supply of shovel-ready employment lands. Many Greater Golden Horseshoe municipalities are nearing full build-out of their urban area boundaries and are experiencing growth pressures on designated greenfield areas. This is not the case for Niagara, as the Region has a large supply of vacant residential lands in addition to a significant supply of vacant employment land.

Niagara Falls and Niagara Region together have done considerable work to provide locations and structure to future growth. More on this work can be found in the Growing City Discussion Paper.

However, the Region's vacant employment land supply does not necessarily mean these lands will be developed. Often, these vacant parcels are constrained by environmental features or lack proper municipal servicing, or potential transportation issues if in the wrong location. Parcels can be expensive to service, potentially deterring prospective employers ready to develop.¹⁸ This shortage of employment land is especially true with respect to the City of Niagara Falls. The Niagara Falls Employment Lands Strategy found that the City had only 48 hectares of vacant shovel-ready employment land, with only one parcel of over 10 hectares in size and only two parcels between 5 to 10 hectares. A further 34 hectares was identified as "serviceable", with the largest parcel being only 18 hectares.

Owing to its location at the gateway to the United States and its situation within the economic powerhouse that is the Greater Golden Horseshoe, Niagara Falls is well positioned to attract new industrial and other businesses, including those with an international outreach.

Things to Think About

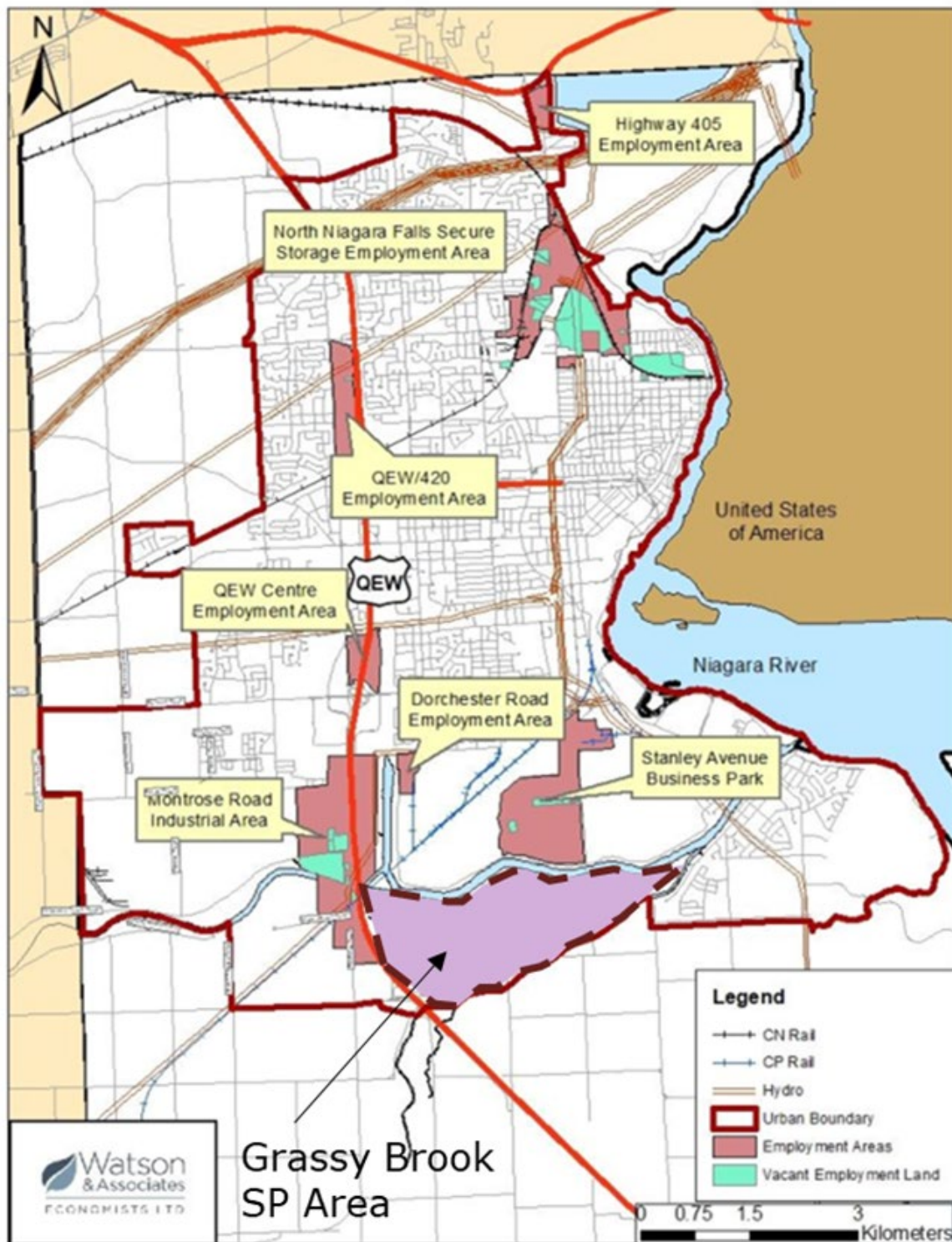
While increased interest rates have dampened short-term growth, the industrial sector continues to be fueled by a few key trends:

1. The seemingly unstoppable logistics and warehousing industry, which is primarily a by-product of the e-commerce era. This is not only reflected in the mega-warehouse sector (e.g., Amazon, UPS) but also now includes medium-sized sites geared to local distribution, individual industrial units for ghost kitchens and small e-commerce businesses, and even increased demand for public storage units.
2. The sputtering resurgence of the auto industry through electronic vehicle investment, characterized by major investments such as the Asahi Kasei Battery Separator plant announced in Port Colborne and the retooling of plants across North America. Some manufacturers, including Ford, have delayed plans as the switch to electric vehicles proceeds slower than expected.

¹⁸ Niagara Region's Employment Area Strategy: Background Report and Recommendations, January 31, 2020, urbanMetrics inc. and MHBC. p, 27.

3. A skilled labour shortage continues to slow manufacturing output. However, this may be overcome in the near to medium term by the introduction of generative AI into the manufacturing process in a way that that could increase manufacturing output on a per worker basis.
4. Economic clusters continue to be important in certain industries. These are a geographical grouping of interconnected businesses, suppliers and associated institutions, which drive innovation, efficiency and access to concentrated labour pools, markets, and supplier networks. Some examples include the Niagara wine industry, the medical device cluster in Massachusetts, and the Italian leather cluster.

Regionally, the Greater Golden Horseshoe represents the economic engine of Ontario with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The region is highly attractive on an international level to new businesses and investors. Its attractiveness is bolstered by its regional infrastructure including Toronto Pearson International Airport, other regional airports, provincial highways, inter-modal facilities, as well as immediate access to a large labour force, post-secondary institutions, and the U.S. border.



Niagara Falls Designated Employment Area Supply July 2020

Source: Employment Lands Strategy, City of Niagara Falls, Phase 2 Report, Watson & Associates, April 1, 2021. The Grassy Brook Secondary Plan (outline added by urbanMetrics).

3.2 The City's Employment Land Supply

The Employment Land Strategy also projected that, by 2051, the City will have a shortfall of some 60 hectares of employment land without the addition of new employment land designations. It is also important to note that the shortfall is based on high level employment projections conducted as part of the Region's municipal comprehensive review. Demand for employment land in Niagara Falls could be influenced by a wide range of factors not considered as part of the employment projection methodology. For example, the opening of a new employment area adjacent to the Queen Elizabeth Way could stimulate demand from the ability to offer larger parcels with immediate highway access which are generally not available within Niagara Falls. As a result, demand could be greater than suggested by the shortfall if the right types and location of land were made available.

The existing supply of employment lands severely limits the opportunities available to the City to fulfill its role as an International City, both in terms of the limited availability of lands and because there are no significantly sized parcels to accommodate a major industrial user. To some extent, this will be addressed through the addition of a new employment area within the ongoing Grassy Brook Secondary Plan to the east of the Queen Elizabeth Way and South of as well as the approved Grand Niagara Secondary Plan to the west, which will include the new hospital site and additional employment lands adjacent to the Queen Elizabeth Way. Together, the Grassy Brook and Grand Niagara secondary plans will also add a significant residential population at the south end of Niagara Falls.

Initial studies associated with the Grassy Brook Secondary Plan have identified the importance of connecting this area with the Montrose Road Industrial Area to the northeast and the future hospital secondary plan area to the west. Before the employment land potential in Grassy Brook is established, further study in this area is required with regards to land use compatibility with sensitive uses, the natural heritage area, cultural heritage, improvements to the Queen Elizabeth Way interchange, sanitary servicing, and the subwatershed.

This will be in addition to the future Secondary Plans intended primarily for residential uses, including Northwest Secondary Plan Area and the Garner West Secondary Plan Area, as well as secondary planning for the existing hospital site and adjacent surplus Ministry of Transportation lands.

Provincial and Regional policies have identified Niagara Falls and Fort Erie as "The Niagara Economic Zone" due to its proximity to major international border crossings, and its unique economic importance to the region and Ontario. The Niagara Economic Zone includes a large portion of land outside the Niagara Falls settlement area boundary. The Regional Official Plan, however, has several policies which allow it to identify and consider future employment areas as part of settlement area expansions.



Things to Think About

1. Our Niagara Falls Plan will need to consider if lands for jobs are in the right place, or what work will be necessary to make that determination.
2. Our Niagara Falls Plan should consider the continued role and planned function for current employment areas, in alignment with the Niagara Official Plan and its planned function to current areas.
3. Any policy barriers to unlocking business investment in Niagara Falls should be analyzed to confirm whether they continue to serve their planning intent.

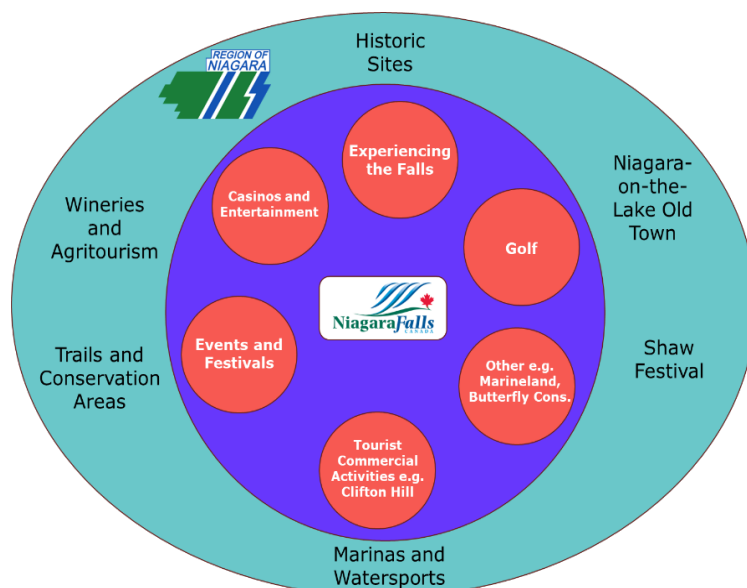
3.3 Renewing and Redefining the Niagara Falls Tourist Proposition

Why It's Important

The City's tourism sector is an engine for economic development and employment. One of the world's largest tourist hubs, the City attracts 14 million tourists and \$2 billion in tourism spending annually¹⁹.

Niagara Falls is an integral and central part of the Niagara regional tourism cluster. Tourism is vitally important to the City's and the Region's economy. Niagara Region supports approximately 40,000 tourism related jobs, with the tourism sector experiencing rapid growth prior to the pandemic. Tourism has a provincial location quotient of 1.8 and a national location quotient of 1.7. This means that the concentration of tourism jobs relative to total jobs in Niagara is 1.8 times that of Ontario and 1.7 times that of Canada, which illustrates the massive importance of tourism to the Region's as well as the City's economies.

As illustrated in the Figure above, Niagara Falls has a very diverse range of tourism opportunities, many of which are directly related to experiencing the falls, such as the Journey Behind the Falls, Niagara City Cruises, and the White Water Walk. Others leverage on to the visitors attracted to the



Niagara Falls and Niagara Region Tourism Clusters

Source: urbanMetrics inc.

¹⁹ Niagara Falls Economic Development Plan 2024-2029 p. 9.

Falls, such as Clifton Hill, the Butterfly Conservatory and the Niagara Parks new Power Plant attraction. Others benefit from the reputation of Niagara Falls, but have developed into attractions in their own right, such as the casinos and the championship golf courses.

However, as strong as the Niagara Falls tourism cluster is, there is a very high degree of interdependence with the broader regional tourism cluster, including the wineries, Niagara-on-the-Lake, the Shaw Theatre, historic sites, area agri-tourism, and the variety of outdoor activities related to the Niagara Escarpment and the riverfront and Niagara Gorge. While Niagara Falls can seek ways to strengthen and expand its own cluster, it should be done in a manner that complements the broader regional cluster—protecting lands for tourism-related uses, providing broad opportunities for new businesses (within the broader frameworks of character and compatibility), and targeting strategic investments accordingly.

The most successful tourism strategies are those which create a critical mass of attractions by enhancing the connectivity between visitor destinations that, at first, may appear to be distinct from a geographic and market perspective. While Las Vegas, for example, is known as gambling mecca, it has transformed itself into a very broadly marketed tourism destination, including the Grand Canyon, the Mojave Desert, the Hoover Dam, Red Rock Canyon, as well as a myriad of activities for children, teens and non-gambling adults. The Las Vegas hotel and hospitality industry, which was originally established to support the casinos, now hosts millions of non-gambling visitors and uses the City as a base to explore neighbouring regions, and even adjoining states.

The same dynamic works with Niagara Falls and the wide range of tourist products in the surrounding region. By broadening the focus of the cluster, Niagara Falls can address two of its tourism challenges, that being to extend the average length of stay and to develop Niagara Falls as a year-round destination.

While Niagara Falls and Niagara Region provide for a very diverse tourism market, as with any tourist destination, it is important to continually renew experiences to keep up with current trends and to avoid product staleness. While there are numerous emerging trends in the global tourism industry, some have direct relevance to Niagara Falls:

Wellness and Retreat Tourism		Fueled by an aging population, Wellness and Retreat Tourism Focuses on a range of mental and physical health activities, such as spas, yoga retreats, walking and cycling holidays.
Eco Travel		As the population is growing more ecologically focused, there has been an increased demand for ethical and sustainable tourism products, such as staying at an eco-friendly resort, volunteering in disadvantaged countries, remote animal viewing, often with an educational component
Indigenous Tourism		Popular as an international tourism product, these experiences are typically owned and operated by indigenous people and may involve staying in traditional accommodations, eating traditional foods and experiencing remote locations.
Marketing Technologies		Technology is rapidly becoming embraced in all aspects of life. There are a wide range of technologies being used in all aspects of the tourism industry, including marketing, trip personalization and packaging, attraction development and transportation.
Culinary Tourism		The popularity of food shows and influencers, has caused the food tourism industry to skyrocket. Food tours and products could be based on cuisine types, popular chefs, city specific food tours, cooking classes, etc.
Pop Culture and Nostalgia Tourism		A growing trend are tours and products focused on popular culture, such as tours of famous movie and tv locations, tours around storied events (e.g. NYC Mafia tour, Chicago Prohibition Tour, ghost tours, Frank Lloyd Wright architecture tour).

Emerging Tourism Trends

Source: urbanMetrics inc.

Niagara Falls in conjunction with the Region is well positioned to capitalize on most of these trends. Together with the Region, there is an abundance of tourism products targeted at the wellness and eco-tourism markets, including the Niagara escarpment, the Bruce Trail, conservation areas, and several spas and retreats. Similarly with the culinary tourism market, within the broader region there are numerous world-class wineries and dining experiences. The City's Economic Development Plan includes a strong focus on advancing new technologies in the tourism sector. Given the extensive history of Niagara Falls, there is likely considerable potential to advance the pop culture and nostalgia market. Similarly, while there are Indigenous tourist experiences in Niagara, given the rich First Nations history in the region, this segment is also likely underdeveloped.

Fostering better connections and recognition to Indigenous Nations, plus the Black and Asian Communities, and the City's responsibilities in these areas are discussed in the Cultural City Discussion Paper.



Things to Think About

1. Overcrowding, traffic congestion and Parking issues during peak periods are in part, resulting from the seasonality of visitation and the lack of diversity of options in local transportation.
2. Niagara Falls as a centre is very much a car-dependent travel destination owing to a lack of options to travel to the Falls and within the City itself. There is considerable excitement for and potential in increasing options with the introduction of regular GO Train weekday and weekend service, although cross-border services remain limited. The Niagara Parks Commission itself is investigating alternative transit modes. The Connected and Mobile City Discussion Paper discusses this issue in greater depth.
3. One of the themes from a survey conducted for the Economic Development Plan is that too much focus is placed on the tourism industry and not enough on investing in local businesses and initiatives. Mechanisms to diversify business investment may be considered.
4. The tourism and hospitality industry in general is facing a growing labour shortage. High housing costs in tourist areas exacerbate this problem, where the City and Region could both play a role in advancing options for affordable housing.
5. The City has historically identified a series of tourism-driven nodes and corridors. Given changes in the overall real estate market and tourism sector in general, the continued protection of these areas may result in missing out on other locations for new or enhanced business opportunities. Further, there may be opportunities to reserve space or offer programming at City-run facilities to support business amenities.
6. Engaging with Indigenous Nations and Niagara Falls' cultural communications should be encouraged as part of a tourism development strategy.
7. Our Niagara Falls Plan should investigate ways to support the rural community by supporting tourism uses, agriculture-related business, on-farm diversified uses, and potentially accommodation uses in the countryside, to draw more visitors and more business out of the tourist and employment cores.

3.4 Right sizing the City’s Retail and Commercial Sector

Why It’s Important

The retail and commercial sector plays a vital role in supporting the City’s population, business and tourism sectors. It is also a major source of employment and heavily influences the daily travel patterns of residents. Anticipated growth in the City will require a larger retail and commercial sector, while at the same time e-commerce has dramatically changed how we interact with retail and commercial businesses.

As with many municipalities, the commercial and retail sector in Niagara Falls is in transition, facing a number of emerging trends while at the same time needing to expand to accommodate the demands of new population growth.



Retail Sector Trends

Source: urbanMetrics inc.

Things to Think About



1. The rapid adoption of e-commerce has resulted in many substantial changes to the retail landscape across the world. Major retailers and restaurants have reduced both their locations and their store sizes. Large scale retailers that acted as anchor tenants to draw customers to a shopping centre or area are hard to secure. This directly impacts the viability of new and existing retail developments.
2. Many jurisdictions are encouraging or requiring that retail be accommodated in mixed-use formats. These can be challenging and expensive to develop. As a result, high quality tenants are difficult to attract. In addition, increased housing pressures have led to many older shopping centres being redeveloped as residential or mixed-use sites, often with a significant or total reduction of their former retail function.
3. A projected population increase of over 40,000 persons from 2031 to 2051 (according to the Niagara Official Plan) would require some 1.0 million to 1.5 million square feet of new retail space to support that number of people²⁰. As discussed in the Growing City Discussion Paper, there is capacity and infrastructure planning underway to potentially accommodate population beyond that minimum threshold. This space may require the addition of new retail nodes and new types of retail formats. Of critical importance will be to ensure that new food and services are in proximity to both new/greenfield growth areas and intensification within the existing built-up area (potentially within a mixed use context).
4. Lower incomes in Niagara Falls limit the types of new retail and service commercial uses that are attracted to the City to support new community growth. This is distinct from the retailers attracted to supporting the tourism sector.
5. Downtown Niagara Falls has been struggling for many years. In 2007, a study prepared for the City²¹ reached a conclusion that is still largely true today:

“The downtown itself has languished for a number of years. Despite the presence of the City Hall, the Acres building, and a number of downtown professional office and other community service facilities, the area has lost its retail essence.”

²⁰ Historically, as per urbanMetrics research, urban areas support between 30 and 40 square feet of retail and commercial services space per capita. This has reduced in recent years with the advent of e-retailing. The per capita space ratio is also dependent on the extent of expenditure inflow and outflow from

the community. Niagara Falls would support a higher ratio owing to its tourism market.

²¹ Market Overview and Economic Analysis of the Strategic Implementation Plan (SIP) Queen St. Downtown Area City of Niagara Falls, Ontario. Joseph Urban Consultants and Altus Clayton, June 1, 2007.

As downtowns are generally seen as the face of their communities and source of civic pride, the economic decline of the Downtown has likely impacted the self-image of the City by residents and may represent a challenge to attracting certain types of investment. The downtown does have a bright future, with the expansion of GO Rail service to the Downtown Station, the addition of the University of Niagara Falls Canada, and opportunities for intensification that are likely more affordable than in many competing municipalities. The City currently offers incentives through its Downtown CIP program. The need and opportunity exist to expand, develop, update and refocus further programs to attract investment to the core, paired with infrastructure improvements to support the efficient use of this established area.

3.5 Readyng Niagara Falls for Economic Opportunities

Why It's Important

Niagara Falls is poised to take advantage of a number of economic opportunities. As discussed in this and other Discussion Papers, however, the City needs the right infrastructure in place to ensure that it can be attained and maximized. Many of these opportunities and constraints are explored in detail in other Discussion Papers. This section addresses them only to the extent that they will impact Niagara Fall's readiness for economic growth.

The state-of-the-art 1.3 million square foot new Niagara South Hospital will replace the much smaller and aging existing Greater Niagara General Hospital on North Street. The new hospital will enhance the overall quality of healthcare available to residents and provide increased opportunities for health care and related workers. In addition, it can help to attract innovative health care related businesses. The Niagara Economic Development Plan notes that many of the City's existing healthcare workforce likely must commute outside of the City²². Therefore, the hospital represents an opportunity to keep many of these workers inside the community.

One drawback is that the new hospital would be in a more distant location with respect to the current residential base than the existing hospital which is centrally located to the built-up area—although adjacent lands are slated for future residential development, in addition to a long-term strategy to prepare lands around the hospital for dense urban development and along the Queen Elizabeth Way toward Fort Erie for employment uses. The new hospital site is part of the approved Grand Niagara Secondary Plan. This secondary plan accommodates a mix of community, employment and hospital uses, including some 3,800 to 4,600 new residents and almost 4,000 jobs.²³ In the medium term, a southern centre containing a Region-scale anchor for Niagara Falls away from the historic area and industries may be emerging around this expanded new institution, with nearby lands planned for supportive and complementary employment uses.

The move to the new hospital will also open a very well-situated redevelopment and intensification opportunity on the 7-hectare site of the existing hospital. Paired with surplus lands currently under the City's ownership a future secondary planning exercise will define the vision and opportunities

²² Niagara Falls Economic Development Plan p. 27.

²³ Grand Niagara Secondary Plan, Appendix B.

for this site (and can be informed by similar projects underway elsewhere in the Greater Toronto Area). Secondary planning will begin shortly for this site and surplus Ministry of Transportation lands. These former hospital lands are well suited to provide short-term growth residential potential with the available core services already in place.

Similarly, the new, private University of Niagara Falls Canada provides an abundance of opportunities to reshape the future of the City: by enhancing a home-grown technical workforce; by becoming an anchor institution to attract new businesses; and by helping to kick-start the revitalization of the downtown. The digital focused university could also support existing initiatives, such as enhancing the use of technology within the City's tourism sector. Together, these two institutions could have significant implications for the future of the City.

Things to Think About



1. As the population ages, labour shortages are becoming more and more prevalent across all industry groups. High housing costs have become a barrier to entry for many in the hospitality sector. As noted in the Economic Development Plan, Niagara Falls has lower rates of education among its workforce compared to the Region and the Province. It will be important that Niagara Falls maintains the type of living and economic environment attractive to a young, educated workforce.
2. With tele-commuting and emerging technologies, today's workforce is more mobile than at any time in history. With a high quality of living and lower housing costs than many other parts of the Greater Toronto Area, Niagara Falls has some competitive advantages with respect to attracting a young and skilled labour force. However, the City's housing stock is strongly oriented towards single-detached homes, with minimal housing choice²⁴. In part because of this and limited transit options, Niagara Falls is a very car dependent community²⁵. This lack of choice in terms of housing and transit would be a disincentive to many young, educated workers seeking a more urbanized lifestyle.
3. World-class cities across the world, such as Tokyo, Shanghai, London, Istanbul, New York and Singapore have recognized the importance of urban design in terms of enhancing their competitiveness as international places. The creation of new public spaces, sustainable neighbourhoods, and innovative transit projects are closely linked to the attraction of both knowledge-workers and tourists, as well as enhancing community pride and the overall lifestyle quality. This is discussed in depth in the Attractive City Discussion Paper.

²⁴ Based on the 2021 Census, 66.1% of occupied dwellings in Niagara Falls are single-detached homes, and over 70% of the housing stock comprises detached and semi-detached homes.

²⁵ Based on the 2021 Census, 92.1% of the employed labour force in Niagara Falls reported that they commuted to work, either as a driver or passenger. Public transit was utilized by only 2.1% of the population.

4. Similarly, tourism has been the cornerstone of the City's economy. However, in today's world, Niagara Falls must, more than ever, compete on a global scale with emerging destinations that are more recognized and accessible due to changing technologies. As with every attraction, Niagara Falls must continually renew its value proposition as consumers and trends change. The creation of iconic places and innovative transportation strategies, will help to broaden the City's tourism appeal, potentially:

- Increasing overall visitation
- Drawing more visitors during non-peak periods
- Increasing the average length of stay
- Reducing overcrowding by better moving people around the region and the City
- Attracting visitors seeking a more urban (i.e. non-car dependent) experience



4

Policy Review

Planning and urban development in Niagara Falls is regulated and guided by a range of policy and strategy documents. It is important to recognize that the concept of an “International City” is not in the lexicon of any of these documents. However, the policies and strategies which Niagara Falls may adopt towards its advancement of an international city would need to be (and likely would be) consistent with the vision presented within these documents.

4.1 Provincial Policy Statement (2020)

POLICY REFERENCE: [Section 1.3.2 \(Employment Lands\)](#); [Section 1.7 \(Long-Term Economic Prosperity\)](#)

The Provincial Policy Statement, 2020 (PPS 2020) provides policy direction on matters of provincial interest related to land use planning and development. The Provincial Policy Statement sets the policy foundation for regulating the development and use of land. The Provincial Policy Statement is issued under the authority of Section 3 of the *Planning Act*. Section 3 of the *Planning Act* requires that decisions affecting planning matters “shall be consistent with” policy statements issued under the *Act*. Comments, submissions or advice that affect a planning matter that are provided by the Council of a municipality, a local board, a planning board, a minister or ministry, board, commission or agency of the government “shall be consistent with” the Provincial Policy Statement.



The Provincial Policy Statement provides a range of policy expectations to plan for, protect and preserve employment areas for current and future uses and ensure that the necessary infrastructure is provided to support current and projected needs. This includes protecting areas planned for industrial and manufacturing uses from residential or other sensitive land uses to maintain the long-term operational and economic viability of the planned uses and function of these areas.²⁶ At present, Policy 1.3.2.4 only permits conversions of employment lands to other uses through an upper-tier “municipal comprehensive review.”

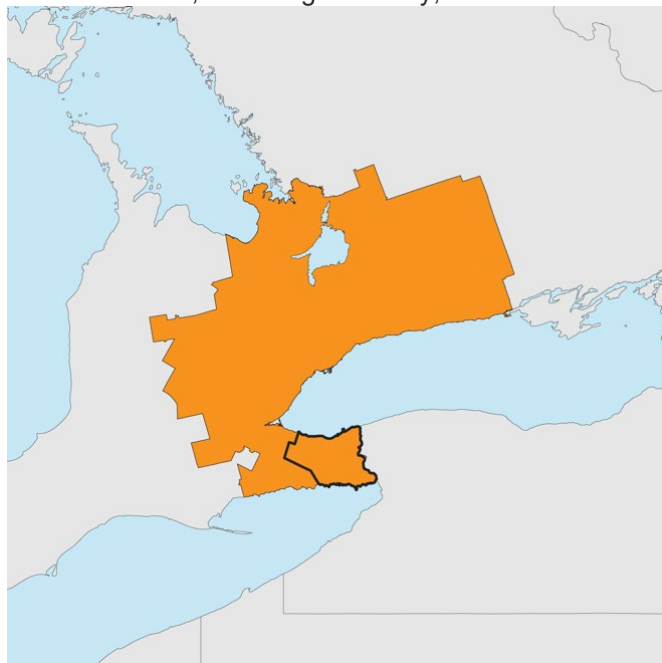
²⁶ Section 1.3.2, and 1.3.2.3 in particular.

The Provincial Policy Statement provides for a wide range of policy objectives aimed at “Long-Term Economic Prosperity”, which include elements, such as investment readiness, providing for a range of housing options for a diverse labour force, encouraging a sense of place, providing for efficient and reliable transportation systems to support the movement of goods and people, and providing opportunities for more sustainable tourism development²⁷.

4.2 A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2019)

POLICY REFERENCE: 2.2.5 (Employment); Section 3.2 (Policies for Infrastructure to Support Growth); Section 5.2.5 (Targets)

A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan), builds on the Provincial Policy Statement to establish a unique planning framework for the Greater Golden Horseshoe that supports the achievement of complete communities, a thriving economy, a clean and healthy environment, and social equity. It provides detailed policy direction across a range of issue areas, with an overarching principal being to support the achievement of complete communities that are designed to support healthy and active living and meet people’s needs for daily living throughout an entire lifetime. It does this by promoting intensification improving the integration of land use planning with investments in infrastructure and public service facilities and providing for different approaches to manage growth that recognize the diversity of communities subject to this Plan. Comments, submissions or advice that affect a planning matter that are provided by the Council of a municipality, a local board, a planning board, a minister or ministry, board, commission or agency of the government “shall conform to” this Provincial policy document.



The Growth Plan stresses, right up front, that, “The evolving regional economy of the Greater Golden Horseshoe will continue to mature into an economic powerhouse of global significance. It will function as Canada’s principal international gateway”²⁸. It calls for ensuring the availability of land to accommodate a variety of employment opportunities, and planning to better connect high density employment, retail and office areas with transit. Of particular importance is that it calls upon municipalities to integrate land use planning and economic development strategies to

²⁷ Section 1.7

²⁸ Section 1.2 and The Vision for the Greater Golden Horseshoe (page 4).

maintain and attract investment and jobs²⁹. In other words, land use planning and economic development should be undertaken as a coordinated effort, rather than be isolated from each other.

The Growth Plan provides policy direction similar to the Provincial Policy Statement, working to steer major office uses to key nodes such as urban growth centres, major transit station areas or other strategic growth areas with existing or planned frequent transit service.³⁰ It also provides for goods movement, and municipal requirements to plan for and protect goods movement facilities and corridors.³¹ It sets a requirement for municipalities to plan to achieve a particular job density target on employment lands.³² Lastly, it also recognizes the importance of cross-border trade with the United States, including a Gateway Economic Zone, which includes Niagara Falls. It requires that planning and economic development in the Gateway Economic Zone support economic diversity and increased opportunities for cross-border trade, movement of goods and tourism.³³

4.3 Draft 2024 Provincial Planning Statement

On April 10, 2024, the Government of Ontario released the proposed Provincial Planning Statement 2024 (former proposed Provincial Planning Statement 2023). The proposed Provincial Planning Statement would be a single, province-wide policy framework along with implementing legislative changes, which combines the Provincial Policy Statement and Growth Plan into one consolidated policy. The changes proposed in the Provincial Planning Statement represent fundamental changes in how growth planning is carried out in the province. At the time of writing this Discussion Paper, the public consultation stage had just closed (May 12, 2024).

The proposed Provincial Planning Statement makes a couple of key changes from the above policies, including removing requirements for separation or mitigation for sensitive land uses within employment areas to a more flexible standard of “maintain land use compatibility between sensitive land uses and employment areas” ensuring that planned function of the respective areas is maintained.³⁴ It also further reduces the policy tests required to support conversion of employment lands to permit non-employment uses at any time and limited to only the following criteria:

- There is an identified need for the removal and the land is not required for employment area uses over the long-term
- The proposed uses would not negatively impact the overall viability of the employment area (by avoiding, or where avoidance is not possible, minimizing and mitigating potential impacts to existing or planned employment area uses—with companion policy to support demonstrating conformity to that policy—and maintaining access to major goods movement facilities and corridors)

²⁹ Section 2.2.5

³⁰ Section 2.2.5.2

³¹ Section 2.2.2.5

³² Section 2.2.5.13

³³ Section 2.2.5.18

³⁴ Proposed Policy 2.8.2.4

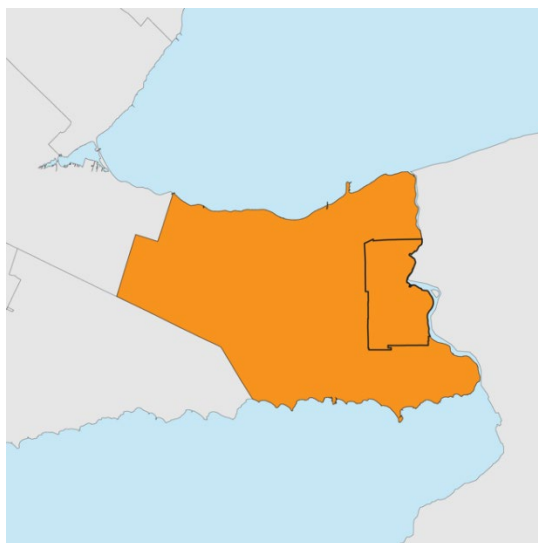
- Existing or planned infrastructure and public service facilities are available to accommodate the proposed uses
- The municipality has sufficient employment lands to accommodate projected employment growth to the horizon of the approved official plan³⁵

Lands used for employment outside of employment areas are proposed to permit, “a diverse mix of land uses, including residential, employment, public service facilities and other institutional uses”.³⁶ This is additional flexibility that would potentially support additional residential or community uses on these sites, within the framework of compatibility between uses.

4.4 Region of Niagara Official Plan, 2022

POLICY REFERENCE: Section 1.4 (Organization of the Niagara Official Plan); 2.3 (Housing), Chapter 4 (Competitive Region), Section 5.1 (Multimodal Transportation System)

The Niagara Official Plan, 2022 (Regional Official Plan), is the vision document for growth across Niagara Region. Approved in 2022, it replaced a 1973 Plan (reformatted in 2014) with a new vision to 2051. Its four pillars include “Exceptional Development and Communities,” “Diverse Housing Types, Jobs and Population,” “Thriving Economy,” and “Resilient Urban and Natural Areas.” The Region undertook a Municipal Comprehensive Review to bring its Official Plan into conformity with Provincial policy to assess its future land needs and growth strategy. On November 4, 2022, the Minister of Municipal Affairs and Housing approved the Niagara Official Plan. It is now in force and in effect. It is a key guiding document for development of the new Our Niagara Falls Plan.



The Region’s Official Plan emphasizes the fostering of communities that attract people, jobs, and investment, while protecting employment uses for the long-term. It also requires municipalities to identify opportunities for strategic investments that further economic prosperity³⁷. The plan sets out a typology of employment lands and designates three “Core” employment land areas and four “Dynamic” employment land areas in Niagara Falls.

1. Core employment areas are clusters of traditional employment uses, such as manufacturing, construction and warehousing.

³⁵ Proposed Policy 2.8.2.5

³⁶ Proposed Policy 2.8.1.3

³⁷ Regional Official Plan, Policy 4.2

2. Dynamic employment areas would incorporate traditional and lighter employment uses, potentially in an office park or business park setting.

EMPLOYMENT AREA	CORE OR DYNAMIC AREA	MINIMUM OVERALL DENSITY TARGET (JOBS PER HECTARE)
Highway 405 Employment Area	Core	15 jobs/hectare
North Niagara Falls Secure Storage Employment Area	Core	15 jobs/hectare
Dorchester Road Employment Area	Core	45 jobs/hectare
QEW / 420 Employment Area	Dynamic	25 jobs/hectare
QEW Centre Employment Area	Dynamic	50 jobs/hectare
Montrose Road Industrial Area	Dynamic	20 jobs/hectare
Stanley Avenue Business Park	Dynamic	15 jobs/hectare

Niagara Falls Employment Areas by Minimum Density

Source: Table 4-2 Niagara Region 2022 Official Plan

Missing from Niagara Falls is the third type of employment area – Knowledge and Innovation – meant for higher density employment uses that facilitate partnerships and promote the sharing of ideas and information. In the longer term, the influence of the University of Niagara Falls Canada and the achievement of its economic development objectives, may cause the City to consider whether this type of employment area would be warranted.

The Regional Official Plan also designates the City of Niagara Falls as part of the Niagara Economic Zone, in which the economic development potential should be maximized.³⁸

The Plan also recognizes opportunities to support tourism through the protection of the region's natural environment system, parks and trails network and geological and cultural heritage resources. Equally important, is that it supports the improvement of linkages from nearby neighbourhoods to major trip generators, including tourist destinations, employment area, post-secondary institutions and other key locations.³⁹

While housing is covered more extensively in other Discussion Papers, it is important to note that in alignment with the Region's Housing and Homelessness Action Plan, the Official Plan supports "the provision of a range and mix of housing options that are essential for the creation of complete communities and support the regional economy"⁴⁰.

4.5 Economic Development Strategies

The **Region of Niagara 2022-2032 Economic Development Strategy** entitled "Inspire, Invest, Grow", sets out a 10-year roadmap to achieve its economic development initiatives. The vision represents the blending of innovation and community:

The strategic directions identified in the strategy call for resilient diversity in the Niagara economy by growing and supporting existing clusters, including agriculture, manufacturing, professional services, and tourism, while at the same time capitalizing on the opportunities available from emerging sectors, such as health care, the film industry, sport tourism/active economy, the marine sector and electric vehicles.

"Niagara Region is where innovative businesses grow and community-minded individuals stay – coming together for a more prosperous future."

The Strategy also recognizes the importance of maintaining a strong linkage between the region's post-secondary institutions and business, as a means to ensuring a robust workforce well matched with employment needs and opportunities. The Strategy also makes note of the need for affordable housing and enhanced transit to maintain and enhance Niagara's competitiveness.

The 5 year **2024-2029 Niagara Falls Economic Development Strategy** has been referred to extensively throughout this Discussion Paper. It identifies four priority sectors including tourism, advanced manufacturing, information and communications technology ("ICT"), and health care (with a focus on health innovation).

³⁸ Policy 4.2.2.1

³⁹ Policy 5.1.2.2

⁴⁰ Policy 2.3

The strategy recognizes the vulnerability of the tourism sector and the need for diversification, including the infusion of increased technologies. The focus on health care relates to the opportunity created by the new hospital, while the advanced manufacturing and ICT sectors tie into the cluster benefits that will be created by the new university.

It leverages the four sectors through activities the four pillars of: diversifying the economy, retaining and growing existing businesses, strengthening the ecosystem and expanding Niagara Falls. \

Finally, the **Niagara Falls Employment Lands Strategy**, completed in 2021, undertakes a review of employment land requirements to 2051, with recommendations:

- To increase the supply and effectiveness of the City's employment lands through greenfield expansion and intensification of existing sites.
- To clarify Official Plan language and terminology, particularly with regard to the use of terms "Employment Lands" and "Employment Areas".
- To align employment land policies with the Growth Plan and the Provincial Policy Statement. [Note: This recommendation predates the proposed Provincial Planning Statement]
- To align the Official Plan with recommended employment land conversions.
- To introduce a new employment area to address the employment land shortfall by 2051 (the Grassy Brook Secondary Plan likely contributing a major among of land)
- To strengthen policies to protect and retain the existing vacant employment land supply.
- To recognize the policies for the Niagara Economic Gateway, which includes the Niagara Falls Priority Investment Area, contained in the Niagara Region Official Plan and to consider potential investment incentives for this area which is not delineated within the City's Official Plan. (Note that the new Niagara Official Plan refers to the Niagara Economic Zone which includes both Fort Erie and Niagara Falls, rather than a Niagara Falls Priority Investment Area.)
- To add policies to encourage a range of parcel sizes, to ensure a supply of shovel-ready medium and large sites, and to add design and quality of life elements to enhance the competitiveness of Niagara Falls employment lands.

The City of Windsor is in a very similar economic situation to Niagara Falls. Its recent economic development strategy published through the mayor's office⁴¹ addresses the challenges and opportunities of being a border community. It proposes a strategy of economic diversification, leveraging the opportunities that the new hospital presents to grow its health care sector, and the importance of investing in its college and university. It discusses the need for support from the Federal and Provincial governments, but also the benefits from working together with its US

⁴¹ Windsor Works, An economic development strategy for the city's future growth, Public First, 2021.

neighbour, such as the recent joint bid with Detroit for the Amazon HQ2. Most importantly, it stresses the benefits of building linkages to obtain a more impactful scale:

Bigger, integrated city-regions often diversify and enjoy the economic advantages of scale. This not only leads to higher productivity and hedges a city's bets against global economic trends, but also allows cities to support amenities that in turn attract more people.

4.6 Niagara Falls Strategic Plan 2023-2027

In October 2023, Council approved a new Strategic Plan, which is intended to act as its road map throughout its terms. It lays out three strategic pillars to guide its goals and actions. One of which is Economic Diversification and Growth. As explained in the Plan:

The Plan identifies a number of strategic actions to be pursued over the next four years:

- Music City strategy implementation
- University of Niagara Falls Canada support
- Niagara Falls Innovation Hub support
- Economic Development Strategy Implementation
- Niagara District Airport redevelopment
- Acquire lands for future business park development
- New tourism product development
- Employment Land Study

- New official plan
- New city-wide comprehensive zoning by-law
- Pursuing weekday GO Train service to Niagara Falls

Fostering a balanced and sustainable local economy achieved by expanding and diversifying the types of industries and businesses operating within the community. This involves attracting new businesses, supporting existing initiatives, and spurring innovation and entrepreneurship.

These actions generally mirror those contained in other documents, with a number already progressing. With regards to economic growth, the Strategic Plan provides Council's affirmation of the steps needed to diversify and grow the local economy.

5

Next Steps

The six Discussion Papers have been prepared as a basis for starting the process of public engagement and engaging stakeholder feedback on the path forward for Our Niagara Falls Plan. These papers are not intended to answer any questions—quite the opposite. The hope and goal for these papers is to stimulate discussion and generate ideas to consider when preparing the new Official Plan.

The project team will be preparing a “What We Heard” engagement summary report that captured the feedback received and discussion generated by this report.

The next product in this exercise is the Policy Options Report. Research generated by the project team plus the above public feedback will inform a deeper discussion on several issue areas that an official plan generally governs. The project team will be back later this year to engage on these questions and obtain more ideas to shape Our Niagara Falls Plan itself.