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An Information Base for
Regional Tourism Planning for the Niagara Region

by

Sanjoy Hazra B.A.

A thesis submitted to the
Faculty of Graduate Studies and Research
in partial fulfilment of the
requirements for the degree of
Master of Arts
Department of Geography

Carleton University
Ottawa, Ontario

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ISBN 0-315-39394-7

The undersigned recommend to the Faculty of Graduate Studies and Research acceptance of the thesis "An Information Base for Regional Tourism Planning for the Niagara Region" submitted by Sanjoy S. Hazra (B.A.) in partial fulfillment of the requirements for the degree of Master of Arts (Geography).

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Abstract

Tourism is an activity that is not very amenable to planning. Nevertheless, a clearer understanding by the Niagara Region's local government agencies of the main issues involving tourism would maximize the public value of these agencies' efforts to guide the promotion and development of tourism. For this reason this thesis establishes broad objectives for regional tourism planning for Niagara and examines the existing situation of tourism in the region and its potential; the thesis also provides recommendations for the region's tourism industry.

This thesis is based on the premise that it is far better to promote, plan, and develop tourism in Niagara on a regional basis, than on a piecemeal community by community basis.

Acknowledgements

Thanks go to Professor Anderson, Professor Taylor and Professor Torrance for their indepth comments and criticisms of my work.

I would also like to express my appreciation for the help provided by: the St. Catharines' field office of the Ministry of Tourism and Recreation; Robert Shipley of the Welland Canals Preservation Association, and the Special Collections Section of the St. Catharines' Public Library,

Thanks also go to Ms. Norma Rankin for typing this thesis.

Table of Contents

	<u>Page</u>
Chapter One: Introduction	1
The Rationale for Planning	3
Chapter Two: Tourism Planning	6
Chapter Three: Niagara: An Overview	16
Physical Description	16
The Regional Economy	22
Transportation	26
Chapter Four: Niagara: Environmental Issues	29
Agricultural Land Loss in the Niagara Fruit Belt: A Case Study	29
Pollution	36
Heritage Preservation and Downtown Revitalization	39
Conclusion	42
Chapter Five: Public Agencies	43
Ontario's Land Use Planning Framework	43
The Niagara Peninsula Conservation Authority	44
The Ontario Ministry of Natural Resources	46
The Niagara Parks Commission	48
The Niagara Escarpment Commission	49
Other Agencies	49
Chapter Six: The Tourism Landscape	53
Niagara Falls	53
Fort Erie	60
Port Colborne	61
Wainfleet	62
West Lincoln	63
Grimsby	64
Lincoln	66
St. Catharines	69
Thorold	74
Pelham	75
Welland	76
Niagara-on-the-Lake	78
Summation	82

Table of Contents cont'd.

	<u>Page</u>
Chapter Seven: The Welland Canals	83
Chapter Eight: Impacts	96
Positive Impacts	96
Negative Impacts	99
Chapter Nine: Tourism Indicators	109
Chapter Ten: Market Analysis	120
The U.S. Pleasure Travel Market Study	120
a) Touring	123
b) The Outdoors Market	128
Canadian Travel Survey	136
Ontario Travel Survey: Festival Country	139
Regional Niagara Planning Department Reports	151
Tourist Area Traffic and Parking Study	152
Conclusion	155
Chapter Eleven: Market Trends	156
Chapter Twelve: Recommendations and Conclusion	167
Niagara Falls	168
Fort Erie	173
Port Colborne, Wainfleet and West Lincoln	174
Grimsby	175
St. Catharines, Thorold and Lincoln	177
Welland and Pelham	180
Niagara-on-the-Lake	181
Regional Strategies	183
Conclusion	192
Bibliography	193
Appendices	199

<u>List of Tables</u>	<u>Page</u>
8.1 An Index of Tourist Irritation	101
10.1 Pleasure Trip Categories of the U.S. Pleasure Travel Market Survey	121
10.2 Distribution of Canada's Share of Eight Trip Types Taken by Americans	122
10.3 What Americans Say about Touring Destinations They Prefer to Visit	126
10.4 Top 20 Touring Activities of Americans	127
10.5 What Americans Say about Outdoor Destinations They Prefer to Visit	130
10.6 Top 20 Outdoor Activities of Americans	131
10.7 Selected Activities of Travellers Ranked by Degree of Popularity	137
10.8 Breakdown of Travel Expenditures	138
10.9 Type of Accommodation Used - By Destination	138
10.10 Mode of Transportation by Length of Stay - Festival Country	142
10.11 Same Day Travel by Origin Region	142
10.12 One or More Nights Travel by Origin Region	143
10.13 Trip Purpose by Length of Stay	143
10.14 Activities Participated in at Festival Country by Length of Stay	145
10.15 Accommodation	146
10.16 Seasonality of Travel by Length of Stay	146
10.17 Itemized Expenditure	147
10.18 Average Expenditure Per Traveller Per Stay	147
10.19 Age of Overnight Travellers	149

<u>List of Tables cont'd.</u>	<u>Page</u>
10.20 Occupation (Chief Wage Earner of Household) of Overnight Travellers	149
10.21 Education Level of Overnight Travellers	150
10.22 Household Income of Overnight Travellers	150
10.23 Reasons for Visiting Niagara	153
12.1 The Implementation of the Recommendations: A Summary of the Responsibilities of the Main Public Agencies	169
12.2 Tourism Themes for Niagara	190

<u>List of Figures</u>	<u>Page</u>
1 The Regional Municipality of Niagara: Location	ix
2.1 Gunn's Regional Strategic Planning Process	10
3.1 Niagara: Municipalities	17
3.2 Niagara: Transportation Routes and Major Physical Features	19
3.3 Physical Features	21
3.4 Unemployment Rates, 1981-1985	24
3.5 The Relative Importance of Agricultural Products, 1975	24
3.6 Transportation	27
7.1 Niagara's Historic Waterways: Continuous Route	86
9.1 Chartered Bus Permits issued by the Niagara Parks Commission	111
9.2 Total Traffic Recorded in the Niagara Parks System	111
9.3 Camping Attendance at Conservation Areas: 1974-1983	112
9.4 Attendance at Niagara Parks Commission Campgrounds	113
9.5 Occupancy Rates: Seasonal Variations	116
9.6 Occupancy Rates	118
10.1 Festival Country	140

Figure 1

THE REGIONAL MUNICIPALITY OF NIAGARA: LOCATION

Regional Niagara Planning Department

CHAPTER ONE

INTRODUCTION

The purpose of this thesis is to provide an information base that can be applied to the planning and development of tourism in the Regional Municipality of Niagara*.

There are four main problems facing Niagara's tourism industry: the length of stay of visitors to the region is extremely short; the per capita expenditure by visitors to Niagara is among the lowest in Ontario; visitation is highly seasonal; and the vast majority of the economic activity associated with tourism in the region is concentrated in only a few nodes such as Niagara Falls and Niagara-on-the-Lake. Comprehensive tourism planning can provide strategies to ameliorate these problems.

This thesis is based on the premise that, for the sake of the tourism industry and the region as a whole, the main objectives of tourism planning for Niagara should be to:

- increase the satisfaction tourists derive from visiting Niagara;
- encourage tourists to visit more of the region;
- attract more visitors during the off-season;

*Also referred to as "Niagara", "the region", and the "Niagara Peninsula" in this thesis.

- increase the length of stay of visitors;
- encourage the promotion, planning, and development of tourism on a regional basis and;
- maximize the economic benefits and minimize the environmental damage associated with tourism.

These goals are important for a variety of reasons.

Increasing visitor satisfaction is essential if Niagara is to compete effectively with other tourist destinations. Encouraging tourists to visit more of the region would spread the economic benefits of tourism beyond the existing tourist nodes. Reducing the seasonality of tourism activity would lead to a more efficient use of tourist facilities and would also reduce the fluctuations within Niagara's economy. Increasing the length of stay of visitors would result in increased expenditures per tourist. Encouraging the promotion, planning, and development of tourism on a regional basis would contribute to the achievement of the previous four goals, in that, promoting and developing the entire region as a tourist destination would encourage visitors to Niagara to stay longer, and visit more of the region. Finally, the fundamental objective of tourism planning for Niagara, and elsewhere, should be to provide strategies for tourism that will maximize the economic benefits and minimize the environmental damage associated with tourism.

In addition to identifying the means by which each of the aforementioned objectives can be realized, this thesis will examine the socio-economic and environmental consequences of tourism. These consequences must be considered if the benefits and costs of Niagara's tourism industry are to be fully

understood. Such an understanding by local government agencies is essential if they are to ensure that the benefits of tourism to Niagara are optimized and the costs minimized.

The Rationale for Planning

It should be stated at the outset that the concept of tourism planning may appear to be inapplicable to the region because its tourism sector is composed of hundreds of private operators and the flow of tourists into Niagara is uncontrollable and unpredictable.

Despite the apparent obstacles to tourism planning, there is a role for governments to play in this field. Admittedly, though, the role of government agencies in tourism planning is somewhat limited by the preponderance of the private sector in this industry. Government agencies can, however, attempt to guide the development of this industry, mainly through land use controls, financial incentives, the provision of market information, and promotional assistance. As tourism grows in stature it will become increasingly necessary for the government to guide the development of this industry to ensure that it provides the optimal benefits to the region.

Some would argue that the "invisible hand" of the free market would ensure that private tourist operators would collectively make all the right decisions for the industry, thus eliminating the need for government assistance to this sector. Such a simplistic argument fails to take into account the fact that the success or failure of the tourism industry is

- a) The extent to which the resources are adequate for the present use of the clients.
- b) To judge what surplus resources there are which might entertain or serve more people and what new resources would be needed if more people came; and
- c) To ensure that the resources are not damaged by an excessive growth in the number and activity of people (p. 163).

Following this measurement of capacity, McCarthy and Dower suggest a statement of options. These options are goals or objectives the tourism industry of a region may wish to consider. An evaluation of the various options available does not necessarily result in the selection of just one option; several goals may be pursued at the same time. This entire selection procedure is simply a method of comparing the various options available to determine which are the most suitable, and how they should be applied.

The amenity budget is a means by which the financial benefits and costs of the various options can be compared. This amenity budget is also meant to provide an opportunity to: "take stock of non-financial resources (that form) the character and prime asset of a (region)" (1975: 168). Unfortunately, McCarthy and Dower do not go into much more detail on the subject of the amenity budget.

The final section of McCarthy and Dower's thought process is a determination of policy implications. For example, application of this procedure to a region may reveal the need for greater coordination between the various bodies responsible for the provision of recreational opportunities.

Gunn (1979) has identified three goals of tourism planning:

One final argument for government intervention in the tourism industry, which has been alluded to earlier, is the simple fact that what is good for the tourism industry is not necessarily good for society as a whole. Thus, there is a need for government regulation of the industry to protect the public good.

Since there is a need for government involvement and industry cooperation in the tourist sector, it follows that government and private agencies involved with the tourist industry in Niagara need a "package of information" that examines: the existing situation of tourism in Niagara, future tourism trends, jurisdiction over resources of significance to the industry, tourist markets, strategies for ameliorating the problems of the tourism industry, and other issues relevant to the industry. The primary purpose of this thesis is to provide such an information base.

CHAPTER TWO

TOURISM PLANNING

Lawson and Baud-Bovy (1977) provide a comprehensive list of the aims of tourism planning in their book: Tourism and Recreation Development. The main aims identified by these authors that are relevant to this thesis are:

- To define short and long term objectives, policies and implementation procedures for developing tourism;
- To co-ordinate and control spontaneous development;
- To give suitable incentives to private (or public) enterprises to provide tourist facilities;
- To maximize socio-economic benefits to the region;
- To avoid costly deficiencies or bottlenecks through carefully phased development;
- To minimize erosion of the very resources on which tourism is founded and to protect those which are unique;
- To provide the political authority responsible for planning decisions with an appreciation of the planning implications;
- To ensure that, as far as practical, the image presented by the destination is matched by the extent of environmental protection and facilities provided;
- To co-ordinate tourism with other economic activities, integrating tourism development in the overall economic and physical development plans of the country (or region).

A number of planning processes for tourism have been devised to meet such objectives. The rest of this chapter will examine the two planning procedures that have influenced the content of this thesis.

McCarthy and Dower (1975) have suggested a "thought process for planning for conservation and development"; this process is essentially a tourism planning model. The process consists of six stages:

1. Survey of amenity and tourism resources.
2. Survey of client groups.
3. Measurement of capacity.
4. Statement of options.
5. Amenity budget
6. Policy implications.

The survey of amenity and tourism resources is meant to indicate what tourist facilities and man-made and natural attractions an area has to offer. Such a list could include the number of recreational opportunities offered in a region for such activities as swimming, picnicking, and so forth. This survey could also list the scenic and historic attractions of a region, and the accommodations and other tourist services available in an area.

The purpose of the survey of client groups is to determine the characteristics of visitors to an area. Such information would include, among other things, their length of stay, their place of origin, and the season in which they came.

The measurement of capacity is conducted to determine:

- a) The extent to which the resources are adequate for the present use of the clients.
- b) To judge what surplus resources there are which might entertain or serve more people and what new resources would be needed if more people came; and
- c) To ensure that the resources are not damaged by an excessive growth in the number and activity of people (p. 163).

Following this measurement of capacity, McCarthy and Dower suggest a statement of options. These options are goals or objectives the tourism industry of a region may wish to consider. An evaluation of the various options available does not necessarily result in the selection of just one option; several goals may be pursued at the same time. This entire selection procedure is simply a method of comparing the various options available to determine which are the most suitable, and how they should be applied.

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The final section of McCarthy and Dower's thought process is a determination of policy implications. For example, application of this procedure to a region may reveal the need for greater coordination between the various bodies responsible for the provision of recreational opportunities.

Gunn (1979) has identified three goals of tourism planning:

satisfaction to users, rewards to owners, and protected utilization of environmental resources. First, user satisfaction must be achieved if an area is to remain a viable tourist destination. Secondly, members of the tourist industry must be amply rewarded if they are to provide quality services and facilities. Such rewards will not be forthcoming if the services and facilities that must be provided by the public sector are inadequate. Government agencies must cooperate with private industry to encourage innovation, appropriate development, and the inflow of tourists, rather than stifle private industry with too many bureaucratic controls. Finally, planning must be undertaken to ensure the protection of natural and cultural resources that directly or indirectly benefit a region's tourism industry.

The tourism planning model suggested by Gunn is called the regional strategic planning approach. Gunn's model provides:

...generalized regional information and guidelines that can foster tourism growth to meet (the three goals of tourism planning). As such it does not solve site problems except as they relate to other sites. It is designed to provide recommendations on both physical and program tourism growth and development (Gunn, 1979: 230).

The regional strategic planning process is composed of five main steps (Figure 2.1).

The first step consists of setting objectives. The strategic planning process should provide a framework for achieving a number of broad goals within a given timeframe.

Step two, the research step, consists of collecting data on the tourist region, and of familiarizing the planner with the area. Gunn has divided the research process into: the research

Figure 2.1

GUNN'S REGIONAL STRATEGIC PLANNING PROCESS

Gunn, 1979

of physical factors, and the research of program factors.

The research of physical factors includes an assessment of natural resources, cultural resources (i.e., historic sites), existing services - facilities, and transportation. In particular, this research includes an assessment of the: "location and description of qualities and quantities" (Gunn, 1979: 250).

Research of program factors should focus on the tourist markets, the possible social and environmental impacts of tourism, how the tourists learn about the region, how they find their way about, and the government's role in tourism. The research should also determine if the land, labour, capital and management skills necessary for tourism development are available.

The information gathered in steps one and two is synthesized in step three, and conclusions are drawn. A synthesis of the data on the physical factors, for example, may provide an indication of what areas have the most potential for tourism from a physical perspective. The synthesis of program data, on the other hand, may indicate some interrelationships between different program factors. Inadequate planning by a local authority, for example, could increase the likelihood of tourism having a detrimental impact on the environment. The conclusions from this synthesis provide a basis for making recommendations.

Step four of the planning process involves the formulation of concepts for the development of tourism. As Gunn points out,

creativity is the key to developing successful concepts.

Although each region will require a different set of concepts, Gunn identifies twelve planning principles that may be applied to tourism planning. Briefly, these twelve principles are:

1. Clustering: Tourist facilities and services should be clustered because, among other things, clustering economizes development, reduces the possibility of widespread environmental damage, and reduces the need for automobile traffic at the tourist attraction.

2. Attraction-service linkage: where possible, services and facilities for a tourist attraction should be located at the nearest community rather than at the tourist attraction itself. Obviously, limited services and facilities such as restrooms and snackbars should be at the attraction site.

3. Natural and cultural resources dependency: As mentioned earlier, the protection of natural and cultural features is necessary to support the tourism industry.

4. Access: Easy access to attractions is, in most cases, necessary for a healthy tourism industry.

5. Population proximity and size: Tourist developments that are near major population concentrations seem to do the best business.

6. Capacity: There are three types of capacity concerns: "physical (not enough room for the visitor), biological (too much walking or driving on fragile sites), and managerial inability to cope because of staff, practices, budget, or mandate limitations". According to Gunn proper design and management policies are needed to forestall these problems.

7. Cities: Cities are prime tourist destinations because they have numerous facilities and attractions.

8. Social-Developmental Climate: Tourism cannot be successfully imposed on communities that do not want it; if it is, tourists will feel unwelcome and the area will develop a bad reputation.

9. Two types of tourism: Touring and destination are the two major subsystems of tourism.

- The touring subsystem includes the facilities, services, and attractions on the route of tourists who are visiting several different attractions during their

holiday. The attractions are usually visited only once. Furthermore, the activities of this type of tourism are relatively passive and tend to be constrained by the time limits associated with touring.

- The destination subsystem encompasses a smaller area. Activities at the destination must be amenable to repetitive use by the tourist, since the tourist is likely to stay at a destination point for much longer than at a touring attraction.

10. Flexibility: Tourism planning must be extremely flexible because tourism itself is an extremely dynamic industry. Thus, tourism plans that can be easily altered must be developed.

11. Human Placeness: A tourist destination should not seem completely alien to the tourist from either a cultural or physical point of view.

12. Heterogeneity: Different places have different potentials for tourism. Tourism cannot be seen as an easily acceptable panacea because some areas have very little potential for tourism.

All the concepts that are formulated for tourism development during the strategic planning process should be subject to an evaluation before being implemented. This evaluation should be conducted by the major public and private bodies involved with tourism.

Step five basically consists of a summary of recommendations for the tourism industry based on the findings of the previous four steps. In the words of Gunn the recommendations "formalize the directions and guidelines" (Gunn, 1979: 334) for the development of tourism, thereby providing a plan that the industry may follow.

The structure of this thesis is based on Gunn's regional strategic planning model, with some of the elements of McCarthy and Dower's planning process incorporated into it.

The first step, the identification of tourism planning objectives, has already been included at the beginning of this thesis.

Research for this thesis was based on a literature review (mostly government documents and newspaper articles), interviews with people involved in the tourism field, and physical reconnaissance of the region. Several of the factors in the research stage of Gunn's strategic planning process will not be dealt with in this thesis. Financial and management issues will not be discussed because some limit has to be imposed on the range of issues dealt with in this thesis. Information regarding how visitors learn about the region, and how they find their way about, is unavailable, thus information-direction factors will not be included in this thesis.

In general, the research stage of this thesis has not been as comprehensive as that suggested by Gunn due to limitations of time and data. Research for this thesis focuses mainly on the following factors:

- natural resources
- cultural resources
- existing services - facilities
- transportation
- tourist markets
- social and environmental impacts
- the role of the government.

The implications of market trends for Niagara's tourism industry and certain tourism indicators (i.e., hotel occupancy rates,

flows of tourists into Niagara) will also be included in this thesis.

The end result of the final three steps of Gunn's strategic planning process will be encapsulated into one section of the thesis entitled "Recommendations and Conclusion". The recommendations of this thesis are the product of a synthesis of the information gathered at the research stage and the subsequent formulation of physical and program development concepts. Gunn suggested that these concepts be subject to an examination by the various agencies involved with tourism before being formalized as recommendations. For the purposes of this thesis, however, such an evaluation will not be included.

The final recommendations will mainly concentrate on the physical development of the region; however, some recommendations will also be made for program development and for regional tourism policy and organization. The priorities for implementing these recommendations to achieve, within the next five years, the planning objectives stated at the beginning of this thesis will also be identified in the final section.

CHAPTER THREE

NIAGARA: AN OVERVIEW

The Regional Municipality of Niagara is made up of twelve local municipalities (Figure 3.1). The breakdown of the region's population (1981) by municipality is:

Fort Erie	24,096
Grimsby	15,797
Lincoln	14,196
Niagara Falls	70,960
Niagara-on-the-Lake	12,186
Pelham	11,104
Port Colborne	19,225
St. Catharines	124,018
Thorold	15,412
Wainfleet	6,000
Welland	45,445
West Lincoln	9,846

The total population of the region in 1981 was 368,288

(Statistics Canada, 1981).

Physical Description

The Niagara Escarpment is the dominant physical feature of the region. Along its length through Niagara its height is, on average, one hundred metres. Due to the efforts of the Niagara

Figure 3.1

Niagara: Municipalities

Planning and Development Department, Regional Municipality of
Niagara.

Escarpment Commission the ridge is largely undeveloped and wooded. There are four major waterfalls on the escarpment within the region. The four are: Decew Falls, Balls Falls, Rockway Falls, and Beamer Falls. All these waterfalls have carved spectacular gorges into the escarpment.

A particular scenic section of the escarpment is the Short Hills district; the area consists of many narrow valleys that have been modified by glacial deposition, water action, and erosion (Ministry of Natural Resources, 1977).

Most of Niagara's orchards and vineyards are located on the Iroquois plain - the lowland between Lake Ontario and the Niagara Escarpment - because of this area's combination of good soils and relatively mild climate. Heavy urban development is found on this plain around St. Catharines and, to a lesser extent, around Grimsby.

Several drowned river mouths adjacent to Lake Ontario disrupt the Iroquois plain. The most significant of these, due to their size, are Martindale Pond and Jordan Harbour.

Located in the center of the region, and occupying the highest point on the peninsula, is the Fonthill Kame Moraine. The sand and silt of the soil in this area is particularly amenable to the growing of tender fruits (Regional Municipality of Niagara, 1981). Thus, this moraine may be thought of as an inland extension of the soft fruit growing areas on the Iroquois plain.

Aside from the Fonthill Kame Moraine, much of the region above the escarpment - known as the Haldimand Clay Plain - is

Figure 3.2

Niagara: Transportation Routes and Major Physical Features

After Jackson, 1985

relatively flat with soils that are only moderately good to poor (in terms of soil drainage (Niagara Peninsula Conservation Authority, 1983)). Thus, in terms of agricultural capability, most of the lands of the Haldimand Clay Plain are, generally speaking, inferior to those on the Iroquois plain. Despite these shortcomings, the Haldimand Clay plain has numerous aesthetic and recreational merits. The sections of the plain adjacent to the escarpment command an excellent view of Lake Ontario and the fruitlands below. South of St. Catharines, above the escarpment, there are a number of small lakes with aesthetic and potential recreational value on this plain. The small but scenic Welland River and an abandoned section of the Welland Canal are two other features of the southern part of the region that have recreational potential.

The main tourist attraction of the southern Niagara Peninsula is the Lake Erie shoreline with its many sandy beaches. Niagara's Lake Ontario shoreline does not offer as many recreational opportunities because of serious water pollution problems and the lack of sandy beaches. Lake Ontario's water pollution problem will be discussed later in this paper.

The Niagara River is the most outstanding scenic attraction of the region. The eastern - American side - entrance of the river is dominated by the sprawling city of Buffalo. On the other hand, the Canadian side of the river's entrance is occupied by the small community of Fort Erie. The land adjacent to the Canadian shore of the river is mostly parkland. The

Peace Bridge, the single busiest border crossing point between the United States and Canada, connects Fort Erie and Buffalo.

Most of the American shore of the upper Niagara River is heavily industrialized. Fortunately, two islands in the river - Grand Island on the American side and the smaller Navy Island on the Canadian side - block much of the view of the unaesthetic industrial belt on the American shore.

The lower Niagara River is, by far, the most spectacular part of the Niagara River. Between Niagara Falls and Queenston the river flows rapidly through a deep and narrow gorge. One of the main attractions of the Niagara Gorge is the whirlpool rapids, the point at which there is a ninety-degree bend in the course of the river. Between Queenston and Lake Ontario the Niagara River is broad, slow moving, and quite picturesque. The river is highly amenable to boating along this section.

In conclusion, the unique physical attractions of Niagara almost ensure that the region will continue to draw large numbers of tourists, provided, of course, that these features are not subject to environmental degradation.

The Regional Economy

The three pillars of Niagara's economy are agriculture, manufacturing and tourism. Unfortunately, the prospects for Niagara's manufacturing and agricultural base are not good.

The main components of Niagara's manufacturing sector are: "transportation equipment, primary metals, steel metal

fabricating, chemical products, abrasives, and paper products" (Jackson, 1985: 24). Much of Niagara's industrial base is mature and is undergoing structural changes that include "complete shut downs and rationalizations" (Jackson, 1985: 24).

Niagara has lost some of the economic advantages that were crucial to its initial development (The Standard, June 12, 1986). The Welland Canal no longer attracts industries to the region because, with few exceptions, ships pass through the Canal without stopping to load and unload. The power generating plants of Niagara have also ceased to attract new manufacturing industries because power now costs the same all over the province. For these reasons, there is a need for new types of employment opportunities in the region.

According to recent trends, Niagara's unemployment rate is higher than the provincial rate and is sometimes even higher than the national rate (Figure 3.4). Niagara's high unemployment rate is the result of the region's dependence on a limited variety of manufacturing activities (Jackson, 1985). The national economic climate tends to have a strong influence on Niagara's economy because of the region's dependence on the manufacture of transportation equipment (mostly automobile related). As may be expected: "a close relationship exists between Niagara's employment and the Canadian sales of North American made cars" (Jackson, 1985: 23). Thus, Niagara's economy suffers severely when the nation's economy performs poorly.

The problems surrounding Niagara's manufacturing base are

Figure 3.4

SOURCE: Statistics Canada, Cat. No. 71-001, various years.

Jackson, 1985.

Figure 3.5

THE RELATIVE IMPORTANCE OF AGRICULTURAL PRODUCTS, 1975

SOURCE: Statistics Canada, Census of Agriculture.

Jackson, 1985.

compounded by the seasonal labour requirements of Niagara's agricultural, tourism, and water transportation industries (Jackson, 1985). The importance of these sectors to the region's economy contributes to the significant seasonal fluctuations in the region's unemployment rates.

Unlike the manufacturing sector, Niagara's agricultural industry is characterized by diversity of produce, and contrary to popular opinion, the main agricultural product (in dollar value) of Niagara is not fruits but livestock (Figure 3.5). The agricultural industry directly employs less than four percent of Niagara's labour force (The Standard, June 12, 1986). Unfortunately, the economic importance of this industry has declined significantly since the 1940's due to both the widespread conversion of agricultural land to other uses and, to a much lesser extent, the reduction in the number of food processing facilities in the region. The loss of prime agricultural land in Niagara will be examined in greater detail in the next chapter. It should be noted that one of the main reasons for preserving Niagara's soft fruit industry has little to do with the economic impacts of this agriculture; simply stated, the orchards and vineyards of the region are such a unique legacy in Canada that there is some justification for preserving them solely for aesthetic reasons.

The nature of tourism, the third pillar of Niagara's economy, will be discussed at length over the course of this thesis. As a means of introduction, though, it is worth noting that the tourism industry appears to be gaining strength

relative to other sectors of the region's economy. Thus, the tourism industry should be viewed as one of the economic means of counterbalancing the declining fortunes of the other two pillars of Niagara's economy.

Transportation

Due to its strategic position, the Niagara Peninsula is a major corridor for ground transportation between the United States and Canada.

The main ground transportation axis of Niagara is the Queen Elizabeth Way (Q.E.W.) which connects the peninsula to Toronto (see Figures 3.2 and 3.6). The highway is also heavily used for inter-peninsula travel. Access to the Q.E.W. from Niagara-on-the-Lake and Welland is straightforward, even though these communities are not directly on this highway. On the other hand, access to Wainfleet and Port Colborne is quite complicated for visitors entering Niagara via the Q.E.W. from the west because there is no direct route between these communities and the Q.E.W. to the north.

The length of the Q.E.W. through the northern part of Niagara is extremely congested and will soon be widened. Regional Road 81 is a scenic alternative to the Q.E.W. between Hamilton and St. Catharines; however, its narrow and winding nature precludes heavy usage.

Grimsby, St. Catharines, and Niagara Falls are the only cities in Niagara with passenger rail service. There are only three trains to and from Toronto each day.

Figure 3.6

The only airport in the Niagara Region that handles commercial traffic is the Niagara District Airport (N.D.A.) just outside St. Catharines. Trillium Air currently has four flights a day connecting the N.D.A. to Toronto using small commuter aircraft (Summer, 1986). Southwest Air has applied for two additional flights connecting N.D.A. to Toronto (The Standard, July 31, 1986).

Apparently a number of tourists fly with Trillium Air from Toronto to visit Niagara Falls and the Shaw Festival; the airline offers a free mini-bus service to Niagara Falls and Niagara-on-the-Lake from the N.D.A. Trillium also has an arrangement that allows passengers flying out of Toronto with Air Canada to fly from N.D.A. to Toronto for free, or for a drastically reduced fare. Southwest Air is seeking a similar arrangement with Canadian Pacific Airlines and Nordair (The Standard, July 31, 1986). If these airlines are successful more flights between Niagara and Toronto could follow.

The two main airports serving the needs of the Niagara Region are Buffalo, New York's International Airport and Toronto's Pearson International. Figure 3.6 illustrates the location of these airports and the ground transportation routes connecting the region to the rest of the continent.

From Figure 3.6 it should seem clear that the Niagara Region is, in general, a highly accessible tourist destination, particularly for highway travellers.

CHAPTER FOUR

NIAGARA: ENVIRONMENTAL ISSUES

Since the natural and man-made environment are so crucial to the tourism industry, it seems appropriate to examine some of the environmental issues concerning Niagara. In some cases tourism may provide the impetus to deal with these environmental concerns; in other cases tourism may aggravate these problems (Chapter 8 deals specifically with the impacts of tourism).

Agricultural Land Loss in the Niagara Fruit Belt: A Case Study

For the purposes of this thesis, the details surrounding the loss of agricultural land in the Fruit Belt are particularly significant, not only because of the importance of the Fruit Belt to the tourism industry, but also because this case study identifies some of the obstacles to planning on a regional basis in Niagara.

The Niagara Fruit Belt is a unique agricultural area. The only other major tender fruit and grape producing area in Canada is the Okanagan Valley in British Columbia. Niagara,

however, is Canada's premier tender fruit growing area. Ralph Krueger, an expert on the Niagara Fruit Belt, claims that: "because of its superior soils and low risk of frost damage (the Niagara Fruit Belt) is second only to California in terms of natural environment for tender fruit production" (Furuseth/Pierce, 1982: 56) in North America.

Niagara's orchards and vineyards are part of the region's allure to tourists. Many of Niagara's visitors enjoy a host of activities that revolve around the region's unique agricultural heritage. These activities include: touring the countryside; enjoying the spectacle of the blossoming fruit trees; visiting the Blossom and Grape and Wine Festivals; touring the wineries; and buying or picking fresh fruit.

Despite the importance of the Niagara Fruit Belt, the acreage of orchards in the region has dropped by almost forty percent since 1951 (Jackson, 1985: 6). Admittedly, the acreage of vineyards climbed steadily between 1941 and 1981, however, since 1981 the acreage of vineyards has probably declined significantly due to the urban expansion of Grimsby and St. Catharines. A total decline in the acreage of specialized fruit farms has been the overall trend (Jackson, 1985: 7).

Perhaps the greatest paradox of the Niagara Region has been that urban development has been encouraged in the most productive agricultural areas of the region which, as mentioned earlier, are generally to the north and below the Niagara Escarpment.

The formidable barrier posed by the Niagara Escarpment has

encouraged urban sprawl below the escarpment. Since most development was initially concentrated below the escarpment, the expansion of this development often spread out below the ridge because of the costs and difficulties involved with building roads up the side of the escarpment. Thus, urban development in the region often tends to stop at the base of the escarpment and then spread either East, West, or North into areas of prime agricultural land.

This situation has been somewhat aggravated by the Niagara Escarpment Commission, the provincial government body responsible for preserving the natural environment of the escarpment. The Commission has established stringent guidelines that have limited the construction of roads up the side of the escarpment, thereby impeding the spread of development above the escarpment.

There are a number of other factors that have encouraged urban sprawl below the escarpment. Perhaps the most devastating of these was the construction of the Q.E.W. highway in the 1930s. The highway - most of which is below the escarpment - is a major growth corridor; a great deal of urban development has sprawled along it.

Related to the Q.E.W. is another highway project that was recently completed by the Provincial Ministry of Transportation and Communications. This project, the 406 extension, was completed in 1985 after years of delay, and amidst a great deal of opposition. This four-lane highway connects the Q.E.W. to the 406 highway which leads to the city of Welland. Many

hectares of specialized fruitlands had to be cleared to accommodate the highway.

The need to re-orient transport routes to areas above the escarpment is obvious; unfortunately, a plan to build a mid-peninsula transportation corridor, which would help to reduce the spread of development below the escarpment, has been abandoned by the Transportation Ministry (Krueger, 1982: 6).

Despite a low population growth rate, the region is experiencing a growth in subdivisions. In St. Catharines alone a number of subdivisions are being developed, or have just been completed, on what was once prime agricultural land. It should be noted that the twinning of the Q.E.W.'s Burlington Bay Skyway (now known as the James Allen Skyway) over Hamilton harbour may well make commuting between Niagara and Toronto easier; the skyway is currently a major bottleneck on the Q.E.W. Thus, more homebuyers may flood into Niagara from Toronto when the twinning is completed.

Another problem related to urbanization in the Niagara Fruit Belt is the development of rural residential areas. In many respects rural residential developments are pockets of urban development that have taken root in the countryside. They are often inhabited by people who commute to work in nearby cities. Unfortunately, this type of development has:

Irreversible implications on the orchardists who remain. (These include) high land prices, which make expansion difficult, fragmentation of land holdings, increased costs through the need for fencing, restrictions on agricultural operations which affect neighbours (and) increased municipal taxes to pay for urban orientated services. (Bond/Manning/Bircham, 1981: 59).

As will be discussed later, tourism and recreational developments in rural areas can have the same impacts on farmers.

The high prices of rural land that result from the encroachment of urban uses into rural areas has tempted many farmers to sell their land. The provincial government has aggravated this situation by financing water and sewage facilities through some of the best fruit growing areas in Niagara. In fact, in some areas there has been an over-provision of these services which has resulted in pressure from some municipalities to increase development (Krueger, 1978: 191).

Perhaps the biggest controversy arising from the loss of fruitland in Niagara has been the designation of urban and rural lands by the government. The conflicts that arose during the designation process illustrate some of the obstacles to regional planning in Niagara.

The land designation controversy began when the Niagara Regional government submitted its Regional Niagara Policy Plan of proposed urban area boundaries in 1974. Many argued that the amount of land given urban land use status was far in excess of what was needed for the expected urban growth of the region. According to H.J. Gayler:

The areas within the proposed urban areas boundaries could accommodate approximately 640,000 people by 1991 whereas the expected population would not exceed 500,000 people by that date (Gayler, 1979: 44).

The efforts of the Preservation of Agricultural Lands Society

(PALS) and other interested parties finally managed to get other government departments involved in the situation.

In 1975 the Ontario Ministry of Housing finally rejected the regional plan because it felt that the new urban boundaries would have taken up too much tender fruitland. Nonetheless, the Regional government continued to insist upon larger urban boundaries.

The continued developmental stance taken by the Region reflected the problems inherent in the regional government structure. In the words of Gayler:

Attempts to protect the area's valuable agricultural land... have been constantly frustrated by regional and local planning processes which have been loath to recognize such a conservationist cause as a need to plan for slower growth (Gayler, 1982: 165).

The problem is that each municipality in the region puts its own interests well ahead of those of the region. These conditions have bred hostility and non-cooperation within the regional government; particularly because the Regional Council (which makes decisions for the region) is made up of members from these individual municipalities.

This spirit of non-cooperation emerged again in the region in 1985 while Toyota was seeking a location for a new automobile plant in Ontario:

The municipalities vied with each other to attract its (the autoplant's) employment, tax potential and the supposed flood of ancillary enterprises to sites in their municipalities. Regional unity almost submerged under municipal rivalries...(Jackson, 1985: 43).

There is also little evidence of these municipalities cooperating to promote the Niagara Peninsula to tourists.

It took two sets of hearings by the Ontario Municipal Board (OMB) for the regional government and the OMB to reach a compromise on the urban boundaries issue. Throughout the hearings PALS kept pushing for a reduction in the 1974 urban boundaries.

The Regional Niagara Policy Plan that resulted from the hearings did not substantially alter the urban boundaries of the 1974 plan; nonetheless, a reduction in some of the urban boundaries did save some fruitlands.

Along with the reduction of urban boundaries, the new plan established certain goals to encourage the long term preservation of the fruitlands. The three basic objectives of the new plan were:

1. Redirect economic growth and population towards the south of the escarpment.
2. Limit expansion of urban centres located north of the escarpment.
3. Control non-farm development in rural areas (Bond/Manning/Bircham, 1981: 66).

The OMB also stressed the importance of planning on a regional rather than a local level (Furuseth/Pierce, 1982: 201). The recommendations provided at the end of this thesis were formulated with these objectives in mind.

In summation, the loss of agricultural land in the Niagara Fruit Belt is of significance to the tourism industry. The orchards and vineyards of the region are a major part of the attractively unique environment of the Peninsula; to lose them would almost certainly reduce the tourism potential of the

area. Unfortunately, the lack of cooperation among municipalities to preserve the Fruit Belt suggests that efforts to coordinate the promotion and development of tourism on a regional basis in Niagara will face many obstacles.

Pollution

Pollution is yet another environmental problem facing Niagara that has implications for tourism in the region.

The contamination of the Niagara River by toxic chemicals has been highly publicized. There is, however, a much broader problem of pollution in Niagara which is inhibiting the tourism potential of other parts of the region.

Parts of the Old Welland Canal in St. Catharines are extremely polluted. The pollution of this canal is both odourous and unsightly; particularly in southern St. Catharines where the waters are often covered with a thick layer of foam.

A bicycle and hiking path has been constructed along the remains of this Canal, but the recreational and tourist potential of this area cannot be fully exploited as long as pollution conditions remain the way they are.

One of the main sources of the Canal's pollution is a newsprint mill and chemical by-products plant in Thorold that is operated by the Ontario Paper Company:

There are basically two kinds of waste discharged by this pulp and paper mill. 1) Suspended solids such as small wood fibres, and 2) dissolved solids such as wood sugars, lignins, and cellulose organic material. The latter contributes to the depletion of oxygen content in the water and raises BOD (Biochemical Oxygen Demand) (Brook University, Department of Biological Sciences, 1979: 8).

An increase in BOD reduces water quality and threatens aquatic life.

The Ontario Paper Company has spent large sums of money on pollution abatement; unfortunately, at least four companies along the Old Canal are discharging excessive amounts of pollution, according to provincial guidelines, into the Canal. These four are: Domtar Fine Papers in St. Catharines, the Beaver Wood Fibre Company in Thorold, Fraser Inc. in Thorold, and Domtar Construction Materials Ltd. in Thorold (Brock University, Department of Biological Sciences, 1979).

The pollution of the Old Welland Canal is of great significance to the St. Catharines tourism industry because the Canal flows into Twelve Mile Creek which flows into Martindale Pond and Port Dalhousie harbour. Port Dalhousie is developing into a major tourist attraction while Martindale Pond is the site of the famous Royal Henley Regatta, the second largest annual rowing event in the world.

Untreated raw sewage is also being dumped directly into the Old Welland Canal. Unsafe levels of Fecal Coliform bacteria at four of St. Catharine's five beaches have resulted from this form of pollution (The Standard, July 30, 1986) because the bacteria flows from the Canal to the Lake Ontario shoreline. The beaches with high bacteria levels have to be closed because

...people who swim in bacteria-laden water may contract serious infections and gastro-intestinal disorders, with children being at higher risk than adults (The Standard, July 30, 1986).

Such pollution has had an adverse affect on Port Dalhousie's

tourist trade. In fact, the beach at Port Dalhousie was once very popular with tourists from Toronto.

Unfortunately, it may be some time before St. Catharines' beaches are safe again. At present, St. Catharines' beaches are "regarded by the Ministry (of Environment) as among the worst beaches in the province in terms of high bacteria counts" (The Standard, July 30, 1986). It should be added that the waters of Lake Ontario at Niagara-on-the-Lake near the mouth of the Niagara River are also susceptible to high bacteria levels.

Pollution in Niagara is by no means confined to just the northern part of the peninsula and the Niagara River. It has been determined that several companies are polluting the Welland River (The Standard, July 26, 1986); a river which is used extensively for recreation, particularly at the point at which it joins the Niagara River. Effluents in excess of provincial guidelines are also being discharged into Frenchman's Creek in Fort Erie (The Standard, July 25, 1986). Furthermore, raw sewage and other non-industrial wastes are probably being dumped into many of Niagara's other waterways, particularly in the rural areas, but this has not been substantiated.

In addition to water pollution, a number of dumpsites in Niagara are identified as posing a potential risk to human health and the environment (The Standard, July 21, 1986). Furthermore, the Ontario Waste Management Corporation plans to build a large toxic waste disposal facility in the municipality of West Lincoln. Initially, there were proposals to build this facility in Niagara Falls. Fortunately, Niagara Falls was not

chosen because a report on the possible impacts of such a facility on Niagara Falls' tourism industry:

...substantiates the fact that...the location of any type of hazardous waste treatment facility (in Niagara Falls)...could have a serious negative impact on both existing and future tourism development (Pannell Kerr Forster, 1985: Introduction).

Of all the municipalities in Niagara, West Lincoln has the least developed tourism infrastructure, and the least tourism potential; thus, from a tourism planning point of view, West Lincoln is the most appropriate municipality in Niagara to harbour this waste treatment plant.

In summation, pollution, particularly water pollution, is impeding efforts to exploit the tourism potential of certain parts of the region. Thus, a tangible economic cost is being imposed on parts of the Niagara Region by the polluting companies. From an economic point of view, these polluting companies should absorb these external costs rather than pass them on to other sectors of the economy.

Heritage Preservation and Downtown Revitalization

Heritage Preservation can be an important investment in a tourism industry. Unfortunately, many of Niagara's historic sites and structures have deteriorated due to neglect; others have been completely destroyed. In St. Catharines, for example:

Developers have paved over some of the city's most attractive buildings and sights because of short-sighted planning (The Standard, December 26, 1983).

In the mid-nineteenth century St. Catharines was a famous health resort due to the presence of mineral springs in the area.

Today, the last remaining trace of St. Catharines' role as a health resort is the Welland House Hotel, a seedy establishment that exhibits few signs of its former grandeur.

Many of the remains of the Old Welland Canals (there have been four canals since 1829) have also been lost. Sections of these canals have been paved over, polluted, or vandalized. Fortunately, as will be discussed later, large-scale efforts are now being made to preserve the old canals.

The downtowns of many of the cities and towns in Niagara hold many historic buildings worth preserving. Unfortunately, the rise of the shopping mall has led to the decline of many downtown cores in Niagara. Furthermore, the facades of many downtown buildings have been replaced by unaesthetic, but easy to maintain, materials. In other cases, buildings that are entirely unsympathetic to the surrounding environment have been erected. Communities all over Ontario - and North America, for that matter - have encountered this problem; in Niagara, however, such negligence of the area's downtown cores has become an obstacle to the development of tourism beyond the existing tourist nodes in the region.

In communities like Perth, Ontario, downtown revitalization has translated into increased tourism. Communities in Niagara that revitalize their downtowns increase their chances of attracting some of the tourists visiting places like Niagara Falls or Niagara-on-the-Lake.

The downtowns of attractive communities in the Niagara Fruit Belt such as Grimsby, Vineland, and Beamsville, could be

revitalized and promoted to lure visitors off the busy Q.E.W. highway. In St. Catharines, Niagara Falls, and Welland, downtown revitalization is already well underway.

The redevelopment of the Market Square has been one of the most visible developments, so far, in the revitalization of downtown St. Catharines. The head of the St. Catharines market vendor's association was quoted as saying:

If the market becomes a success it will be a drawing card for people from other areas, like Buffalo and Niagara Falls. During the summer we have a lot of people from these areas come already and I think that with some improvement we might be able to draw more (Collins, 1986: 18).

Further efforts by the government and the private sector to revitalize downtown St. Catharines have been completed, or are planned.

Niagara Falls' revitalization efforts consist mainly of streetscaping - improving the aesthetic quality of the downtown area. In fact, downtown Niagara Falls - much of which is not frequented by tourists - has already been considerably improved. It is hoped that additional improvements will draw more tourists into the downtown from the more popular areas of the city.

Downtown Welland is also being improved. The core will soon have a large covered market and the city has already had a number of beautification projects over the past five years (Collins, 1986). It must be admitted, though, that downtown revitalization in Welland may not attract more tourists because of the site and situation of the city.

In conclusion, downtown revitalization efforts may improve

the ability of certain communities to attract more tourists; even if it does not, such efforts would benefit the local residents of these communities by strengthening their downtown cores and improving their built environments.

Conclusion

Tourism can provide an additional reason to ameliorate many of the environmental problems facing Niagara. In other words, tourism can provide an economic justification to deal with such concerns as pollution, loss of agricultural land, and heritage preservation.

CHAPTER FIVE

PUBLIC AGENCIES

The implementation of any regional tourism plan will require the cooperation of the public agencies that have land use management and planning responsibilities and the public agencies that manage tourist and outdoor recreational facilities. Thus, a familiarity with the main agencies with these responsibilities is necessary for tourism planning.

Ontario's Land Use Planning Framework

Realistic tourism planning for the Niagara Region requires an understanding of the province's land use planning framework because the types of land uses associated with tourism are diverse, and the attractions and infrastructures of the tourism industry are spread over the land base. Furthermore, the aesthetic and functional qualities (i.e., carrying capacity) of the land base are more important to tourism than to many other industries.

In Ontario, regional and municipal governments are largely responsible for regulating private land use. Thus, in Niagara, where most of the land is privately held, the

regional and municipal governments conduct most of the land use planning.

The Ontario Planning Act delegates responsibility to the municipalities to develop official plans. These official plans provide guidelines for the physical development of the municipality. Zoning by-laws and subdivision controls are the main planning tools used by municipalities to ensure that these guidelines are adhered to by private land owners and developers. Regional governments develop broader plans for an entire region. These regional plans identify, among other things, areas that should be protected or preserved.

All municipal official plans must conform with their region's overall plan. It is the joint responsibility of the local, regional, and provincial governments to ensure that official plans and zoning-by-laws conform with regional plans. These regional plans require the approval of the Ontario Ministry of Housing and Municipal Affairs to be considered legally binding.

The Niagara Peninsula Conservation Authority

The Niagara Peninsula Conservation Authority (N.P.C.A.) plays a considerable role in the planning and management of Niagara's land base. This Authority has jurisdiction over an area of 2,424 square kilometres bounded on the east by the Niagara River, the west by the Grand River, the south by Lake Erie, and the north by Lake Ontario (Niagara Peninsula

Conservation Authority, 1983).

Due to the flexibility afforded by the Ontario Conservation Authority Act, the Authority may undertake a variety of land use activities. Section 20 of the Act states that:

The objects of an authority are to establish and undertake, in the area over which it has jurisdiction, a programme designed to further the conservation, restoration, development, and management of natural resources other than gas, oil, coal and minerals (Niagara Peninsula Conservation Authority, 1983: 10).

Basically speaking, the N.P.C.A., like all Conservation Authorities, is a corporate body that is a form of regional government. Representatives from municipalities within its jurisdiction have a say in the operations of the Authority. Conservation Authorities work closely with local governments and the Ontario Ministry of Natural Resources.

Most of the direct land use management activities of the Authority are restricted to the Conservation Areas: lands owned or leased by the Authority. In Niagara these conservation Areas serve such purposes as preserving escarpment lands, shorefront lands, wetlands, forests, and other unique or sensitive areas. Conservation Areas are also used for heritage preservation and for the provision of recreational opportunities. There are twenty-nine Conservation Areas in the Niagara Region; altogether they account for approximately 1,330 hectares of the region's land base.

The recreational opportunities available at some of these Conservation Areas include: boating, swimming, picnicking, fishing, camping, and hiking. At the Ball's Falls Conservation

Area the Authority maintains several historic structures for public viewing.

The Ontario Ministry of Natural Resources

The responsibility of the Ministry of Natural Resources is to manage the province's public land base and its forest, water, fish, and wildlife resources, and to provide the people of Ontario with outdoor recreational opportunities. Since only a small proportion of Niagara's land base is held by the Province, the role this Ministry can play in the region is somewhat restricted, but significant nonetheless.

For the convenience of administration, the Ministry of Natural Resources has divided much of Ontario into administrative districts. The Niagara District consists of the Niagara Region plus the town of Dunnville and most of the town of Haldimand; these two towns are located in the Regional Municipality of Haldimand-Norfolk.

The Ministry of Natural Resources has developed comprehensive land use guidelines for the Niagara District. These guidelines indicate the goals of this Ministry in Niagara, the areas in the district where the Ministry hopes to meet its objectives, and the methods by which these goals are to be achieved. These goals include a wide range of activities such as: environmental preservation, the provision of recreational opportunities, the protection of wildlife, etc. These guidelines have absolutely no legal status, nonetheless, they provide local and regional planners with an important

information base.

The Ministry of Natural Resources is not responsible for managing private lands, conservation areas, or lands held by the municipalities; nonetheless, the Ministry may indirectly influence the management of these lands. The Ministry may, for example, provide advice to regions and municipalities on land use matters. Furthermore, the Ministry may provide funds to municipalities and Conservation Authorities to enable them to acquire land for such purposes as environment preservation or outdoor recreation.

Direct involvement in local and regional planning processes by the Ministry of Natural Resources is also possible. If, for example, the Ministry feels that a proposed development on private land should not take place, it may discuss the issue with the owner of the land, the municipality, or the Ministry of Municipal Affairs and Housing; even though the proposed development may conform to local and regional plans. If negotiations fail, the Ministry can apply to the Ontario Municipal Board for a hearing to resolve the issue in question. Through such means, the Ministry of Natural Resources has the power to exercise considerable influence over land use matters.

The Ministry plays a relatively minor role in the provision of recreational opportunities in Niagara. It owns and manages the Short Hills Candidate Provincial Park which consists of 690 hectares of land north of Fonthill. With the exception of trails, the park does not provide any formal recreational opportunities; however, when it is fully designated a Provincial

Park, it will provide such facilities as picnic areas, and campgrounds. About 1.7 hectares of land in Grimsby that gives the public access to about 180 metres of beach on Lake Ontario is also owned by the Ministry (Ministry of Natural Resources, 1983).

Indirectly, the Ministry assists in the provision of recreational opportunities by providing grants and advice to local agencies responsible for providing outdoor recreational facilities.

The Niagara Parks Commission

The basic mandate of the Niagara Parks Commission is to carry out a program of: "preservation, restoration, commemoration, beautification, and attraction, for the enjoyment of the millions of park visitors from all over the world" (Seibel, 1985: 2).

The Niagara Parks Commission is the most visible public agency in Niagara responsible for managing tourist and recreational facilities. About 1130 hectares of parkland in Niagara are under the jurisdiction of the Commission. Most of this land is part of the Commission's linear park system that stretches from Lake Ontario to Lake Erie along the Canadian shore of the Niagara River. Within this park system the Commission maintains boat launches, a marina, a golf course, picnic areas, horticultural gardens, historic sites, swimming areas, and a campground. The Commission also operates several popular tourist attractions such as an aerocar ride and scenic

tunnels behind the Falls. Just west of St. Catharines the Commission operates a park (Charles Daley) with picnicking, swimming, and camping opportunities along the Lake Ontario shoreline.

The Niagara Escarpment Commission

This Commission is responsible for enforcing the Niagara Escarpment Planning and Development Act which: "aims to preserve the unique topography of the escarpment (Lands Directorate, 1982: 99).

A masterplan for the preservation of the escarpment was completed and published for public inspection in April 1986 after twelve years of studies and public hearings (Toronto Star, April 4, 1986).

Now that the plan is complete, the control over development on this ridge will gradually be transferred from the Escarpment Commission to the municipalities located along the escarpment. The official plans of these municipalities must conform to the Niagara Escarpment Plan; the Province will negotiate with the municipalities to bring about such conformance, however, if negotiations fail, the Ministry of Municipal Affairs and Housing can unilaterally change official plans to ensure that they comply with the Escarpment Plan (Toronto Star, April 4, 1986).

Other Agencies

The Ontario Ministry of Transportation and Communications plays a very minor role in the provision of recreational

opportunities by providing roadside picnic areas. Indirectly, though, this Ministry has an impact on the availability of recreational opportunities through the location of its transportation routes. A highway that is built along a shoreline, for example, could cut off public access to the shore.

Parks Canada manages several historic sites along the Niagara Parkway. These sites are: Fort George and Navy Hall in Niagara-on-the-Lake, the Brock Monument in Queenston, and Butler's Burying Grounds in Niagara-on-the-Lake. Parks Canada has also helped rebuild other points of historical significance along the Niagara Parkway.

The St. Lawrence Seaway Authority owns the present Welland Canal and most of the remains of the past canals. This Authority also owns Canal Road, a scenic road along the Canal that stretches from Lake Ontario to the top of the escarpment. Thus, the Authority is responsible for the only means of access - by car - to the locks in St. Catharines and Thorold.

There are many agencies concerned with developing the recreational potential of the old and new Welland Canals. The Welland Canal Preservation Association, a non-profit private organization, has constructed a bicycle and hiking trail along almost the entire length of the old and new canals. In Welland, Public Works Canada owns a section of an abandoned Welland Canal channel which has been developed for tourism and recreation.

There are many other agencies interested in both the preservation and development of the Welland Canals; most of

these are members of the Ad Hoc Welland Canal Group, an umbrella organization consisting of 19 interest groups, agencies, and governments.

Ontario Hydro also manages some recreational resources. The agency owns several bodies of water with a great deal of recreational potential. At Queenston - next to the Niagara Gorge - Ontario Hydro owns a huge reservoir on which the public is allowed to fish. South of St. Catharines, Ontario Hydro owns several small lakes along which the public can hike or fish. Swimming or boating on these waters is considered dangerous due to strong currents.

Ontario Hydro also owns the length of the Twelve Mile Creek in St. Catharines that stretches from the escarpment to the Q.E.W. highway. This river flows through a very scenic valley that cuts through the heart of the city. There is a hiking and bicycling trail along a major portion of this river.

Local municipalities own and operate a large number of recreational areas; these include: beaches, parks, and picnic areas. Municipalities also help fund facilities like museums. The regional government does not operate any tourist or recreational facilities except for a tourist information booth.

Harbours such as Port Dalhousie in St. Catharines are owned by the Federal Department of Oceans and Fisheries (However, it is managed by the City of St. Catharines). Martindale Pond in St. Catharines - where the famous Royal Henley Regatta is held - is owned by Public Works Canada.

Clearly, the ownership and management of the recreational

resources owned by the public sector is fragmented among many agencies. The ownership and management of the private sector's recreational resources is, of course, even more fragmented.

CHAPTER SIX

THE TOURISM LANDSCAPE

The tourist attractions and facilities of Niagara will be discussed here along with the strengths, weaknesses, and in some cases, the history of the tourism industry in each of the municipalities. The purpose of this section is to provide an understanding of the tourism potential of each of the region's municipalities.

Appendix One indicates the distribution of various tourist and recreational facilities and attractions in Niagara, by municipality.

Niagara Falls

It is perhaps appropriate to begin with Niagara Falls since it is the focus of the region's tourist industry.

The tourist industry of Niagara Falls dates back to at least 1791 when:

a log hut situated on the high bank above the Horseshoe Falls served as an inn. It was described as "the only place of accommodation, for travellers of the day to refresh themselves" (Seibel, 1875: 6).

By the mid-1800's the area along the Falls was the site of a

great deal of unsightly commercial development. In 1847, a visitor to the Falls wrote:

Now the neighbourhood of the great wonder is overrun with every species of abominable fungus - the growth of rank bad taste, with equal luxuriance on the English (now Canadian) and the American sides - Chinese Pagoda, menagerie, camera obscura, museum watch tower, wooden monument and old curiosity shops (Seibel, 1985: 12).

In order to preserve the natural scenery of the Canadian side of the Falls the Niagara Falls Park Act was passed in 1885 (this marked the birth of the present day Niagara Parks Commission) and three Parks Commissioners were appointed. The act allowed the government to determine the cost of the land required for park purposes. In 1887 the Queen Victoria Niagara Falls Park Act was passed, and led to the transfer of land to the Parks Commissioners. The Commissioners were given responsibility over virtually every aspect of the administration of the park.

The Niagara Parks Commission continues to own and manage the land adjacent to the Falls, plus land along the entire length of the Canadian side of the Niagara River.

Within the Niagara Parks System, in the northern part of the city of Niagara Falls, there are numerous attractions. These include: the School of Horticulture (the well-maintained grounds of which contain ponds and a huge display of flowers, trees, and bushes), the Spanish Aerocar ride over the whirlpool, the Floral Clock, the Sir Adam Beck Generating Station, the famous Whirlpool Golf Course, and adjacent to the Falls there is Queen Victoria Park.

The section of the Niagara Parks Systems within the city of Niagara Falls, and south of the Falls, also contains numerous attractions. Among these are the Niagara Parks Greenhouse, and the extremely popular Kingsbridge and Dufferin Islands recreational areas. Both the Kingsbridge and Dufferin Islands parks offer swimming and picnicking opportunities; the Dufferin Islands offer the added attraction of paddle boat rentals. In summation, the Niagara Parks make up the city of Niagara Falls' main publicly owned tourist and recreational corridor.

Beyond the Niagara Parks, the city has such attractions as: observation towers next to the Falls, helicopter rides, several museums, a large waterslide and wavepool complex, six golf courses (not including the Whirlpool), several amusement parks, a number of shopping areas oriented towards the tourist market, and a large number of picnicking, camping, and fishing opportunities.

Niagara Falls has two noteworthy festivals. The Blossom Festival celebrates the coming of spring in April and May with a number of events, including a large parade. The Festival of Lights is held along the Falls from about the end of November to the end of February. During this festival the areas adjacent to the Falls - including the buildings and observation towers - are illuminated with coloured lights.

One other attraction that deserves special mention is Marineland, a large theme park with several amusement rides including the World's largest steel roller coaster, a large collection of animals, and a popular show in its amphitheatre.

featuring dolphins, killer whales, and other animals.

Marineland is currently undergoing a massive expansion which includes: canals with riverboats, a monorail system, and more. When these developments are complete Marineland may rival Niagara Falls as a focus for tourism in the city, and in the region. In fact, when Marineland's expansion is complete it will be the closest thing to Disneyland in Canada, thus it could assume national significance.

Unfortunately, Clifton Hill and other parts of Niagara Falls' downtown tourist core have been criticized for being too commercial. Certainly, to many tourists, many parts of downtown Niagara Falls must convey the image of a typical, low quality, tourist trap. In fact, a Federal report on tourism states that Niagara Falls' tourism industry has reached the declining stage of development, which means:

The product, infrastructure and services have deteriorated due to lack of maintenance or a failure to address changing market requirements. Major revitalization is required (Jackson, 1985: 36).

In other words, high quality facilities must be developed in Niagara Falls. Marineland, the waterslide facility, and the Pyramid Place Imax theatre are positive developments, but more is needed if Niagara Falls is to remain competitive with other tourist destinations.

The municipality of Niagara Falls' most obvious competitor is Niagara Falls, New York. The greatest advantage Niagara Falls (Ontario) has over its adversary across the border is its view. There is absolutely no doubt that the view of the Falls

from the Canadian side is far superior to that from the American side. Furthermore, the Canadian side of the Falls appears to be maintained in better condition than the American side; due mainly to the efforts of the Niagara Parks Commission. For these, and perhaps other reasons, Niagara Falls, New York, attracts approximately 4.5 million tourists a year while the Canadian side attracts about 15 million visitors a year (The Toronto Star, October 14, 1984).

Despite its locational disadvantages, Niagara Falls, New York is trying hard to attract more tourists. The American city's tourism industry has even gone so far as to publish a pamphlet entitled: "Going to Canada? Know before you go", which states that hotel-motel rates, food, cigarettes, gas, beer, entertainment, and parking costs are higher on the Canadian side of the Falls (Niagara Falls Review, July 19, 1985).

One of the main advantages Niagara Falls, New York, has over its Canadian counterpart is public funding. The American city

...has a remarkable array of Municipal, State, and Federal programs to come up with 'the most enticing package' for business interests willing to locate in Niagara Falls, N.Y. (Toronto Star, October 14, 1984).

Such a "package" has no doubt been prepared to encourage the development of a proposed "mega-mall" in the American city.

Triple Five Corporation is currently debating whether to construct a \$1.2 or \$2 billion dollar shopping centre - amusement complex in either Toronto or Niagara Falls, New York

(The Standard, May 12, 1986). The Americans have been far more aggressive than the Canadians regarding the promotion of their site for the proposed development. If the New York site is chosen it will almost certainly dramatically improve the American city's ability to draw tourists.

It is too early to tell what impacts the proposed mall could have on Niagara Falls, Ontario, if it were built in the American Niagara Falls. It is possible that the development of the mall in the American city would encourage visitors to the area to stay longer; which could increase the number of overnight visitors to Niagara Falls, Ontario. There is also the very real possibility that the construction of the mall in the American city would increase Niagara Falls, New York's tourist market share at the expense of its Canadian counterpart's share.

Nothing as grandiose as the Triple Five Corporation's proposed mall is planned for Niagara Falls, Ontario, except the planned expansion of Marineland; however, the city is undergoing a construction boom.

A considerable amount of tourism development is either planned or underway in the city. In the area adjacent to Clifton Hill, for example, there are plans to build: a pedestrian mall, a large leisure centre with swimming pools and tennis courts, a 25 story hotel with 400 rooms, a theatre for "headline" entertainers, and more (Niagara Falls Review, January 2, 1986).

Although Clifton Hill will be the site of much new

development, trends indicate that the city's tourist industry is moving southwards towards Marineland. In 1985, the Niagara Parks Commission completed a large parking lot and station for its shuttle system in the southern part of the city opposite Marineland. A 296 room hotel complex is also expected to be built near Marineland. The recently completed Ramada Inn, and the proposed hotel complex at the base of the Skylon Tower, are also examples of tourism development south of the central tourist area (The Standard, May 7, 1986; Niagara Falls Review, March 1, 1986).

Many in Niagara Falls' tourist industry are hoping that a major transportation system will be built through the main tourist areas of the city, including the area adjacent to the Falls (Queen Victoria Park).

The Niagara Parks Commission offended much of the city's tourist industry by launching its own internal transit system in 1985 to reduce the traffic problems at Queen Victoria Park. The Commission's \$10 million "People Mover" system consists of ultra-modern buses that run between stations within Queen Victoria Park and a large parking lot near Marineland.

Many in Niagara Falls' tourist trade feel that the People Mover system is having a negative impact on their businesses. Among the many complaints when the system was initiated was the fact that the system eliminated over one hundred free parking spaces near the Falls (The Standard, July 20, 1985). Nonetheless, a study of the economic impacts of the shuttle system suggested that the downturn in business encountered by

some merchants during the first season of the People Mover system could not be attributed to this system, in fact, other nearby tourist areas (i.e., Toronto) also experienced a slump that year (The Standard, July 19, 1986).

Much of Niagara Falls' private industry, and the municipal government of the city, would like a train system installed through Queen Victoria Park and the main tourist areas surrounding the Falls (The Standard, July 19, 1986). Such a system, however, would cost hundreds of millions of dollars and may not be economically viable. Admittedly, though, a major transportation system for the city's tourists is necessary.

In summation, tourism in the city of Niagara Falls is based on a very real and unique attraction: Niagara Falls and the Niagara Gorge. The city is not a Coney Island; it does not depend on attractions such as amusement parks or beaches which can be found in a hundred other places, to attract tourists. Thus, a large scale decline of the Niagara Falls tourism industry is highly improbable, in fact, as mentioned earlier in this section, the city is undergoing a considerable amount of new tourism development. Thus, tourism is likely to remain a powerful economic force in the city.

Fort Erie

South of Niagara Falls is Fort Erie; a very important point of entry into Canada for American tourists.

Fort Erie has quite a variety of tourist attractions, particularly because it has so much shorefront on both the

Niagara River and Lake Erie. The community is also the southern terminus of the Niagara Parkway.

The town has several museums (including the fort the town is named after), a popular race track, four golf courses, a number of swimming, camping, fishing, and picnicking opportunities, and the Crystal Beach amusement park, which is one of the largest amusement parks in Canada.

The tourism potential of the area is good; unfortunately, this potential remains largely unexploited. The city has yet to capitalize on its position as an entry point to both Canada and the Niagara Parks System. Furthermore, the area retains a summer focus, in that its attractions and facilities cater almost exclusively to summer visitors.

Port Colborne

Like Fort Erie, Port Colborne's tourism industry exhibits a strong summer focus. Relative to Fort Erie though, Port Colborne's tourism potential is limited because it is relatively isolated from most of Niagara's main tourist routes. Furthermore, tourism in Port Colborne is limited to the area adjacent to the Lake Erie shoreline. The rest of the municipality has little tourism potential.

Despite its shortcomings, Port Colborne attracts a significant number of tourists; most of whom are attracted by its beaches. One of Port Colborne's most popular attractions is the Sherkston Waterpark on Lake Erie. This waterpark has beaches, the World's highest and largest waterslides, an inland

lake with a swimming area and paddle boat rentals, and massive campgrounds.

Other tourist facilities and attractions in Port Colborne include several campgrounds and motels, a golf course, many picnicking facilities, the Port Colborne Historical and Marine Museum (a six building heritage complex), a number of restored 19th century buildings, and the southern terminus of the Welland Canal. The Canal's Lock 8, one of the largest locks in the world, is in downtown Port Colborne. In the middle of July the town hosts International Week, a multicultural festival. The town is also very popular with cottagers.

In summation, tourism is undoubtedly important to Port Colborne's economy; nonetheless, there is little potential for tourism's share of Port Colborne's economy to increase substantially.

Wainfleet

The nature of Wainfleet's tourism industry is similar to Port Colborne's; however, there are several major differences. Tourism is more important to Wainfleet's economy than it is to Port Colborne's. Port Colborne has a population of about 19,000 and has a fairly diversified industrial base. Wainfleet, on the other hand, has a population of approximately 6,000, and an economy based almost exclusively on agriculture and tourism.

There are not as many commercial tourist facilities in Wainfleet as there are in Port Colborne, but it does have miles

of beaches on Lake Erie, several campgrounds (two of which are Conservation Areas), many picnicking facilities, two golf courses, and two motels. Wainfleet, like Port Colborne and Fort Erie, also has many private cottages on Lake Erie.

Wainfleet is bordered on the north by the Welland River; a relatively small river that is highly amenable to canoeing and boating (small pleasure craft). The Chippawa Creek Conservation Area is located within the municipality on the Welland River. In addition to campsites, nature trails, picnic facilities and other recreational opportunities, the Conservation Area has a small lake with a beach; and a boat launch on the Welland River. Although the Welland River adds to the appeal of Wainfleet; it must be admitted that similar water resources are abundant in Ontario and nearby American states.

In summation, the nature of tourism in Niagara's three southern municipalities - Fort Erie, Port Colborne, and Wainfleet - is very similar, however, of the three municipalities, Fort Erie has the greatest opportunity to significantly improve the state of its tourism industry.

West Lincoln

The tourism potential of West Lincoln is very limited because the municipality has few noteworthy attractions. Physically, this municipality has a mostly flat agricultural landscape; although it does have thirteen of Niagara's twenty-two wet forests. (Regional Niagara Planning and

Development Department, 1985b). The municipality is not on any major waterbody, but it does have the Twelve Mile Creek and the Welland River running through it.

West Lincoln does not have much of a tourism infrastructure. It has one campground on the Twelve Mile Creek but no hotels or motels. The municipality also has very few hiking and picnicking facilities. The main service centre of West Lincoln is Smithville which has some restaurants and antique shops, in addition to some 19th century architecture.

In conclusion, West Lincoln does not have the ingredients necessary to attract large numbers of tourists.

Grimsby

Located in the heart of the Niagara Fruit Belt, and being one of the gateways to the Niagara Region, the municipality of Grimsby can play a major role in encouraging tourists to visit more of the region.

Grimsby's beachfront was once one of the most popular tourists' spots in the Province:

Grimsby Beach was famed as the biggest amusement park in Ontario, outside the Canadian National Exhibition. And everyone from Toronto to Buffalo knew it (Dechman, 1979: 37).

Many of the tourists to Grimsby came by steamer from Toronto. Unfortunately, the demise of this service in the early 1950's put an end to Grimsby's tourism boom.

Grimsby still has a great deal of tourism potential; mainly because of its physical attributes, and also because it is on

the busy Q.E.W. highway.

Scenery is perhaps Grimsby's greatest asset. The Beamer Memorial Conservation Area atop the Niagara escarpment commands an excellent view of Lake Ontario and the surrounding farmlands. This Conservation Area also has a waterfall.

Other attractions to Grimsby include: the Andres Winery which offers tours of its facilities, the Grimsby Museum which has exhibitions relating to the history of the area, and a beautifully restored railway station which still serves its original purpose, and also includes a restaurant. The municipality has lots of hiking opportunities along the escarpment, and fishing and swimming opportunities on Lake Ontario. Grimsby is also an important flower growing area with several horticultural shows being held here each year.

Unfortunately, Grimsby does not have much of a tourism infrastructure. It has only four small motels and no campgrounds or golf courses. The municipality does not offer many picnicking opportunities either. Most important, Grimsby currently does not have any commercial tourist facilities or attractions that are - or have the potential to become - popular tourist attractions. There is, for example, no large amusement park or major waterfront recreational facility in Grimsby; nonetheless, the municipality does have potential.

The development of a main attraction in Grimsby could provide the foundation upon which the Grimsby tourism infrastructure could grow. Additional marina facilities, for example, could serve boat owners from places like Hamilton and

Toronto where marine facilities may be crowded. Such a facility could encourage the development of restaurants, shopping facilities, and even hotels in the area.

Other means of attracting tourists to Grimsby include promoting farm vacations and the scenic beauty of the area.

Whatever the strategy, it should be recognized that Grimsby has numerous scenic attractions that could be promoted to encourage Niagara's visitors to remain in the region longer.

Lincoln

Physically, the municipality of Lincoln is similar to Grimsby, but unlike Grimsby, Lincoln has several popular tourist attractions and facilities.

Lincoln's four main tourist attractions and facilities are: the Beacon Inn, Charles Daley Park, Prudhomme's Landing, and Tivoli Miniature World. All of these attractions are located along the Q.E.W. highway.

The Beacon Inn is a popular hotel and restaurant complex on Lake Ontario.

Charles Daley Park is operated by the Niagara Parks Commission and offers picnicking, swimming, and camping opportunities on the shores of Lake Ontario.

Prudhomme's Landing is a large tourist and recreational complex - much of which has been recently developed - on Lake Ontario. This complex has a large motel, a waterslide and wave pool, restaurants, a campground, a beach, a Go-Kart track, and other attractions.

Right next to Prudhomme's Landing is Tivoli Miniature World, a theme park containing ninety-three scaled down versions of internationally famous landmarks from over twenty-three different countries. Furthermore, the park features a miniature train ride, a petting zoo, a picnic area, and other attractions.

Lincoln also has Ball's Falls, a popular Conservation Area with two waterfalls (the main one being 27 M (90 feet) high), a picnic area, and a number of the original buildings of the first settlers of the area.

Rockway Falls is another scenic waterfall in Lincoln, but it is not likely to attract many visitors because no facilities have been built around it to cater to tourists or recreationalists; nor are there plans to develop it for tourism in the future. The area around the waterfall is being managed by the Niagara Peninsula Conservation Authority. The Authority is mainly concerned with preserving the area, not promoting it for tourism.

Lincoln's other attractions include the Jordan Historical Museum, a golf course, scenic fruitlands, many escarpment related features such as the Bruce Trail, and the Lake Ontario shoreline.

There are two points worth mentioning regarding Lincoln's Lake Ontario shoreline. First of all, the drowned river mouths of several creeks entering Lake Ontario at Lincoln have some tourism potential, particularly the one on Twenty Mile Creek called Jordan Harbour.

The Q.E.W. highway's bridge over the waters flowing between Jordan Harbour and Lake Ontario is too low to permit anything larger than a small speedboat from passing under it. This factor inhibits the development of a large marina in the harbour. There has, however, been some indication by the provincial government that the raising of the Q.E.W. at the Jordan Harbour entrance could eventually take place. According to the town's Official Plan, the town would favour such a development (JMT Engineering and Planning Limited, no date).

The second point regarding the shoreline is the fact that much of Lincoln's Lake Ontario shoreline is of little recreational value because, throughout much of the municipality, the Q.E.W. runs along the lakeshore. This problem is, within the Niagara Region, unique to the municipality of Lincoln.

More tourists can probably be attracted to Lincoln, however, there is unlikely to be a significant expansion of the municipality's tourist facilities - with the possible exception of a marina at Jordan Harbour - because zoning restrictions limit the potential for future tourism development in the town. Fortunately, new tourism development in Lincoln may not be needed because the town already has a well-developed, albeit small, tourism industry.

St. Catharines

The historic city of St. Catharines - also known as the Garden City - is renewing efforts to exploit its considerable tourism potential.

Tourism is nothing new to St. Catharines. In the mid-nineteenth century tourists came all the way from the Southern United States to visit St. Catharine's mineral springs. Two major resort hotels were built to cater to those attracted by these springs. One of these hotels, the Welland House Hotel, is still standing.

Up until the early 1950's, Port Dalhousie, which is now part of St. Catharines, was a major tourist attraction. Port Dalhousie's Lakeside Park was a major amusement park. During the summer, many tourists from Toronto came to Port Dalhousie by steamer across Lake Ontario.

The popularity of highway travel after World War Two marked an end to steamer service to Port Dalhousie which, along with other factors, led to the decline of Port Dalhousie's tourism industry.

Today, Port Dalhousie is enjoying a resurgence of tourism activity. Much of the core area has been revitalized. On summer evenings and weekends the area is crowded with locals and tourists.

The Port Dalhousie area currently has beaches, two marinas, restaurants and boutiques, an antique hand-crafted carousel, remnants of the old Welland Canals, numerous historic buildings, and the Royal Henley Regatta.

The Royal Henley Regatta is the largest annual rowing event in North America. It is held in Martindale Pond each August.

There are currently plans to develop the Port Dalhousie area even further. The most significant planned development is a new full-service marina designed to accommodate 300 to 350 boats (Lanmer Consultants (1978) Ltd., 1984). Other plans include additional streetscaping, the construction of new walkways, protecting additional historic buildings, developing a public square and fisherman's wharf, and other improvements to the area.

Unfortunately, the water quality of this area is very bad; in fact, Lake Ontario's beaches at Port Dalhousie have been closed due to health reasons. The water flowing into Martindale Pond and Port Dalhousie harbour is also extremely polluted. If this pollution were reduced, the tourism potential of Port Dalhousie would probably increase.

All in all, the prospects for tourism in Port Dalhousie are good. In fact, Port Dalhousie may very well become a major regional focus of tourism activity in the near future.

St. Catharines has many other attractions besides Port Dalhousie; these include the Niagara Escarpment, the Welland Canal, the scenic Twelve Mile Creek valley with its hiking and bicycling trails, a waterfall, many historic sites and structures, two golf courses, two wineries offering tours, two museums, and much more.

Downtown St. Catharines is increasingly exhibiting tourism potential. The downtown core has numerous historical

buildings, many of which date back to the mid- nineteenth century. Recently, two of the more outstanding historical structures in the core were renovated and now include, among other things, several boutiques. These renovations are part of a much larger downtown revitalization process that is being conducted by private businesses and the city government.

One of the most significant developments, so far, in the downtown revitalization effort is the renovation of the Market Square. The Market Square is a downtown parking area where farmers hold regular outdoor markets each week. In the summer of 1986 renovations that included the installation of colourful canopies over a large part of the market area, and some streetscaping, were completed.

According to the St. Catharines Downtown Association, the tourism potential of the newly renovated market place is "great" (The Standard, June 17, 1986). It is perhaps fair to say that the rejuvenated Market Square adds to the distinctive character of the downtown area. Thus, it has, as mentioned earlier in this paper, the potential to draw more tourists into downtown St. Catharines.

The other attractions of St. Catharines include: the surrounding fruitlands, the fishing opportunities of Lake Ontario and other nearby waterbodies, the Merittrail (a bicycling and hiking path that winds along some of the remnants of the old Welland Canals), the Happy Rolfe Bird Sanctuary (a park on Lake Ontario which contains ponds inhabited by swans and ducks, a petting farm, and a picnic area), and the Stokes

Seeds Farm which has a garden filled with a large display of colourful flowers that is open to the public.

The most popular tourist attraction in St. Catharines is the Lock 3 observation area on the Welland Canal. This facility has an observation deck, souvenir and tourist information complex, and a picnic area. The popularity of this area has increased dramatically since the beginning of this decade. In 1985, "approximately 20 to 25 buses per day - and on some days 35 (buses)" visited the site during the summer (St. Catharines Chamber of Commerce, 1985). In the early 1980's, on the other hand, the area was visited by very few buses. According to the St. Catharines Chamber of Commerce, about 700,000 people now visit this area a year. It should be noted, however, that many of the visitors to this facility probably just pull off the highway for a few minutes to view the site; thus, the economic impact of this facility on St. Catharines may be marginal.

There are a number of festivals and cultural activities held in St. Catharines. The cultural activities include live theatre, concerts, antique shows, and much more. Two of St. Catharine's particularly noteworthy festivals are the Folk Arts Festival and the Niagara Grape and Wine Festival.

Beginning in the middle of May, and lasting for two weeks, the Folk Arts Festival features a number of events sponsored by the community's different ethnic groups. The festival also features a large parade.

The Niagara Grape and Wine Festival is a huge event in the

middle of September featuring one of the largest parades in Canada, plus wine tasting, craft shows, and other special events.

St. Catharines has a fairly wide range of tourist facilities. There are 14 hotels and motels in the municipality, and several more in close proximity. In addition to Brock University, seven of the hotels and motels in St. Catharines offer convention facilities (Regional Niagara Planning and Development Department, 1984b). St. Catharines also has three marinas, two of which are in Port Dalhousie, and a variety of restaurants and shopping facilities.

Unfortunately, the city does not have any campgrounds (although Charles Daley Park is on the St. Catharines border), and all but one of its beaches are closed during the summer due to pollution. The lack of swimming opportunities in St. Catharines is, however, unlikely to pose a serious problem to the local tourism industry because tourists from outside the Niagara Region are unlikely to visit St. Catharines because of its swimming opportunities. Nonetheless, clean beaches at Port Dalhousie would make the area more attractive to tourists.

In conclusion, having some substantial tourist attractions, and being on a very busy transportation corridor, St. Catharines has the potential to become a major regional tourist centre.

Thorold

The twinned flight locks - which are all in the city of Thorold - are the most spectacular part of the Welland Canal. These flight locks are three locks that, built in a row, form a stairway up and down the escarpment for ships. These three locks are twinned to allow simultaneous movement up and down the escarpment.

Unfortunately, most of the tourists to the Welland Canal visit Lock 3 in St. Catharines rather than the spectacular flight locks in Thorold; partly because signs on the Q.E.W. and elsewhere direct visitors to this lock, and also because Lock 3 has received a great deal of promotion by the St. Catharines Chamber of Commerce. Furthermore, unlike Lock 3; the flight locks do not have any tourist facilities (i.e., snack bars, public restrooms, a tourist information centre, etc.). There is, however, a motel overlooking the flight locks!

Also within Thorold are a number of remnants of the old Welland Canals. These cannot be exploited for tourism in isolation though; they must be promoted as part of the many interesting remains of the old Welland Canals.

Part of Thorold lies within the Short Hills area, a scenic landscape of hills, valleys, streams, and waterfalls, adjacent to the Niagara Escarpment. Most of the Short Hills area is a Candidate Provincial Park which is owned by the Ministry of Natural Resources. The Ministry of Natural Resources has a Master Plan for the development of the Short Hills park. According to this Master Plan, picnic areas with 400 tables, a

50 site campground, four group camping sites, a visitor centre, trails, and several parking areas will be developed within this park (Ministry of Natural Resources, 1977).

South of the Candidate Park lies the St. Johns Conservation Area. This Conservation Area - part of which is in Pelham - features nature trails, many unique plant species, and a very popular stocked trout pond.

Tourists may eventually be attracted to downtown Thorold. The downtown - which is currently being redeveloped - has a number of historic buildings. Since downtown Thorold is very close to the flight locks it has the potential to attract more tourists.

In terms of tourist facilities, Thorold has one golf course, but no campgrounds or beaches. The municipality has a dozen motels; however, most of these have been built along Highway 20 to capture some of the Niagara Falls accommodations market.

In summation, Thorold has a great deal of tourism potential that has yet to be tapped.

Pelham

Pelham is a very scenic municipality with numerous attractions. Part of the municipality contains the unique Short Hills area described earlier; in fact, much of the Short Hills Candidate Provincial Park is located in Pelham.

Southwest of Short Hills is the Fonthill Kame, a scenic area containing many orchards. The top of this kame - the highest point in Niagara - offers an excellent view of much of the

region.

Two noteworthy Conservation Areas are located in Pelham. one, the St. John's Conservation Area, was mentioned earlier. The other is the Comfort Maple Conservation Area which has, as its sole attraction, a 450 year old Sugar Maple tree. This tree is believed to be the oldest of its kind in Canada.

Pelham's other attractions include: three golf courses, three campgrounds, and many miles of nature and hiking trails. The area is also excellent for bicycling because many of the roads through its scenic hills and valleys are not crowded.

Unfortunately, Pelham's tourism infrastructure is very summer oriented; despite the fact that many of its attractions can be enjoyed during the spring and fall. The area also has cross country skiing trails, but the ground accumulation of snow in Niagara is often light, so this activity may be limited.

Pelham has the opportunity to attract more tourists, but its charm is its countryside atmosphere. Thus, the promotion and development of tourism in Pelham must be conducted in a manner that is least likely to adversely affect the atmosphere of the area.

Welland

Welland is not well endowed with tourist facilities and attractions. The municipality's landscape is relatively flat and unspectacular. Welland has no beaches, no campgrounds, and only three motels. The section of the Welland River passing

through it is fairly scenic though.

Ironically, the city of Welland has the least interesting section of the Welland Canal. It is the only municipality along the canal that does not have any locks. There is, however, one unique feature of the canal system in Welland that has improved the recreational climate of the city. In 1973 work was completed on a by-pass canal that re-located part of the Welland Canal about two and a half kilometres east of Welland's city core. This relocation left Welland with a significant section of abandoned canal; much of which has been turned into what is now the "Welland Recreational Waterway".

The Welland Recreational Waterway is separated from the adjacent Welland River by a five kilometre long stretch of land called Merritt Island. These waterways are open to boaters. The adjacent lands have been developed into a park with picnic areas, boat launches, and trails.

There were plans for a multi-million dollar tourist development along the Recreational Waterway, but the Federal funds that were needed for this project have been frozen.

A marketing study done for the Waterway suggested the possibility of: "a 250-site campground, theme park, hotel, and waterskiing facilities blossoming on 180 acres of Public Works-owned land" along the Waterway (The Standard, August 16, 1985). Without the Federal funds though, such developments may be impossible.

The Recreational Waterway, as it exists today, is unlikely to attract many tourists because the recreational opportunities

it offers are available in many other areas nearby. Furthermore, many of these intervening opportunities (i.e., the Upper Niagara River) offer other attractions as well. It must also be added that Welland is not on any major travel routes. Thus, the Recreational Waterway is unlikely to become a substantial tourist attraction in itself.

Welland has a few other attractions. These include the Welland Historical Museum and two golf courses. The city also has the Niagara Regional Exhibition, a fall country fair, and the Rose Festival, which features a parade and many other special events.

The city of Welland does have its attractions; viewed realistically, though, it is clear that the tourism potential of the area is fairly limited.

Niagara-on-the-Lake

Niagara-on-the-Lake is one of the more scenic municipalities of the region. It attracts about two million visitors a year (The Toronto Star, March 14, 1986).

Fruit farms, the Lower Niagara River, the Niagara Escarpment, downtown Niagara-on-the-Lake, the Shaw Festival, and the history of the area, are among the many attractions of the municipality.

The town of Niagara-on-the-Lake receives more tourists than any other municipality in Niagara, except Niagara Falls. This large-scale influx of tourists began after the Shaw Festival was established in the town in 1962. Before 1962, "Niagara-on-

the Lake's main street was so sleepy 'you could shoot a gun down mainstreet and not hit a thing, not even a dog'", the current mayor of Niagara-on-the-Lake was quoted as saying (The Toronto Star, March 14, 1986).

Today, the three main attractions of Niagara-on-the-Lake are its downtown core, the Shaw Festival, and Fort George.

The Shaw Festival - an annual festival of live theatre - runs from May to October in the Royal George, Court House, and Festival Theatres. About 10 per cent of the Niagara-on-the-Lake's tourists come for the festival (The Toronto Star, March 14, 1986).

Niagara-on-the-Lake's historic downtown is quite famous. In fact, Niagara-on-the-Lake has been called the prettiest town in Ontario (The Standard, February 16, 1985). Many of its buildings date back to the mid-nineteenth century, and some even date back to the 1830's. Although the Shaw Festival sparked the revitalization of the town, there is no doubt that the mainstreet of downtown Niagara-on-the-Lake is now the town's most important tourist asset.

Fort George is also a popular Niagara-on-the-Lake tourist attraction. This restored fort, originally built in 1797, is under the jurisdiction of Parks Canada. The fort receives about 125,000 tourists during the summer (The Standard, February 16, 1985).

Niagara-on-the-Lake is historically significant for two main reasons: the town was the first capital of Upper Canada, and secondly, Queenston, at the southeast corner of the

municipality, was the site of the most important battle of the War of 1812; it was here that the Americans were so badly beaten that they gave up their efforts to invade Canada.

There are many historical sites of historical interest in Niagara-on-the-Lake that attest to the rich history of the area. These include Butler's Burying Grounds and Navy Hall (both of which are under the jurisdiction of Parks Canada), and numerous museums. At Queenston, visitors can climb the Brock Monument (also owned and managed by Parks Canada), a tower built as a memorial to Sir Isaac Brock, the British General who was killed here during the Battle of Queenston Heights. The Queenston home of Laura Secord - the famous local heroine of the War of 1812- is also open to the public.

In addition to its scenic and historic attractions, Niagara-on-the-Lake has many recreational resources.

The municipality has three golf courses, numerous picnic areas along the Niagara Parkway and some along the Lake Ontario shoreline, several beaches, and a large marina. Furthermore, the entire length of the Niagara River adjacent to Niagara-on-the-Lake is navigable. In fact, up until the 1950's, steamers from Toronto travelled up as far as Queenston loaded with tourists. Several years ago sightseeing boats from Niagara-on-the-Lake travelled up the Niagara River past Queenston.

Queenston Heights park, which is at the southeastern corner of the municipality, is one of the most popular parks in Niagara. It has a huge picnic area, tennis courts, outdoor

concerts, beautiful gardens, the Brock Monument, and other attractions. The park, which is owned and operated by the Niagara Parks Commission, commands an excellent view of the Lower Niagara River and the agricultural lands along Lake Ontario.

Niagara-on-the-Lake does not have many hotels and motels for a town that receives two million visitors a year. There are ten hotels and motels in the municipality, most of which have less than twenty-five rooms. There are, however, well over one hundred guest homes in the town, most of which have two guest rooms (The Standard, June 10, 1986). There are also two campgrounds in the municipality.

There may be a small increase in the accommodations available in the town if some of its twenty-five large estate homes are converted into country inns. The town defines a country inn as:

....a historic or architecturally significant building taking in overnight guests and feeding them breakfast in the morning. It has limited the number of guest rooms to a maximum of 13 (The Standard, May 8, 1986).

Niagara-on-the-Lake's Town Council approved a bylaw that would allow estate homes to be converted into country inns: "to offer an alternative to owners who can no longer afford to maintain estate homes, and to help fill a need for summer tourist accommodation" (The Standard, May 8, 1986). So far, one estate home has been converted into an inn with thirteen guest rooms (The Standard, July 8, 1986).

There is significant opposition to the country inn bylaw;

many fear that the town's unique estate homes could be lost to commercialization. Furthermore, in many cases such conversions would conflict with local zoning bylaws. Thus, it seems unlikely that the Town Council will approve the conversion of a large proportion of the remaining 25 estate homes to country inns.

By all accounts, tourism in Niagara-on-the-Lake is booming. The addition of new hotels, shops, and fast food restaurants would probably be welcomed by many tourists. Thus, attracting tourists is not the problem Niagara-on-the-Lake is faced with; its problem is managing the existing flow of tourists and ensuring that development pressures do not destroy the unique atmosphere of the town.

Summation

From the preceding description it is clear that the tourism potential of some parts of the region are greater than others. Most importantly, though, this section adds credence to the view that there are many areas in Niagara, aside from the existing tourist nodes of Niagara Falls and Niagara-on-the-Lake, that have the potential to attract tourists.

CHAPTER SEVEN

THE WELLAND CANALS

The old and new Welland Canals - there have been four canals altogether - are important resources that could, and should, be the next major focus of tourism promotion and development in Niagara.

A study conducted by the Ontario Ministry of Culture and Recreation (1979) stated that:

...the disused features of these past (Welland) Canals, especially those of the Second and Third Canals, are exceptional and invaluable. Their existence must be more widely known and they must be protected from careless destruction (1979: 24).

Together, the old and new canals have the potential to attract many visitors to Niagara.

The First Welland Canal was opened in 1829*; it connected Lake Ontario with the Welland River, not Lake Erie. In 1833 the extension of the First Canal to Lake Erie was completed. This canal had forty wooden locks along its length. Locks have been necessary on all the Welland Canals because Lake Erie's

*The brief history of the Welland Canals presented here is extracted from Welland Canals Heritage Parkway (Phase II), The Welland Canals Preservation Association, 1983.

water level is about 326 feet (99.4 M) higher than Lake Ontario's. Port Dalhousie was the First Canal's northern terminus; its southern terminus was Port Colborne.

The wooden locks of the First Canal were too small for newer ships, and very difficult to maintain. Thus, a decision was made to build a Second Welland Canal. This Second Canal was completed in 1845 and basically followed the same route as the First Canal; however, there were only twenty-seven locks on this canal because the locks were made larger. Furthermore, the locks on this canal were made of limestone.

Steamships began replacing sailing vessels shortly after the Second Canal was completed. Thus, the Second Canal had to be replaced by a larger canal.

In 1887 the Third Canal was completed. There were a few substantial differences between this and the previous canals. For one thing, the twenty-six locks on this canal were about twice the size of those on the previous canal. Furthermore, much of the route between Port Dalhousie and Thorold was completely new. Despite these changes the new canal was quickly outmoded.

The Fourth Welland Canal - the one in operation today - is a dramatic change from all the previous canals. There are only eight locks on this canal, each of which is massive (minimum dimensions of 766 feet (233.5 M) in length, and 80 feet (24.4 M) in width). Locks one to seven in St. Catharines and Thorold are responsible for overcoming the height differential between Lake Ontario and Lake Erie. Lock eight in Port Colborne is only a

shallow guard lock. The northern terminus of the present canal is three miles to the east of Port Dalhousie, at Port Weller. This Fourth Canal was completed in 1932.

In 1972 work was completed on a 13.4 kilometre channel that re-located part of the canal several kilometres east of downtown Welland. The abandoned channel is now used as a recreational waterway.

A number of studies recommend different ways in which the old and new Welland Canals could be exploited for tourism.

The Niagara Region's Planning Department has published a report proposing that the Welland Canals corridor be part of an 80 mile circular drive. As Figure 7.1 illustrates, the drive would follow the Welland Canal and the Niagara River. The report suggests that the circular drive would have broad appeal because: "according to studies undertaken by Parks Canada, the single most popular outdoor recreational activity is driving for pleasure...In addition, history interests many people as do canals and waterways" (Regional Niagara Planning and Development Department, 1985a:). The report also indicated that many sporting opportunities would be available on the route such as golf, rowing, and hiking.

A list of the benefits that could accrue from the development of a route along Niagara's historic waterways underscores the need for exploiting the tourism potential of the Welland Canals. According to the Regional Planning Department the potential benefits of this circular route are:

- i) the length of stay of those who take it would be extended by at least a day;

2

MicroD

Figure 7.1

ii) the route goes through seven municipalities thereby exposing a ~~major part of~~ the Region with the potential for side trips to pick up points of interest in the other communities;

iii) it could benefit all municipalities through increased commercial activity for food, accommodations, and other services;

iv) organized tours, commercially run, could be developed as day trips thereby requiring associated services and jobs;

v) a variety of other attractions such as a trip on a "tall ship" on Lake Ontario (based in Port Dalhousie) or a recreational trip through several locks on the canal could be developed by private interests;

vi) the development of an attractive parks and landscaping system would benefit existing residents as well as visitors;

vii) the potential exists to develop a garden theme along the canals to complement the "Garden City" and "Rose City" images of St. Catharines and Welland, and the gardens, greenhouses and lawns of the Niagara Parkway;

viii) it could encourage and provide incentive to the groups presently working on the development of the Welland Canals, and could bring a number of municipalities together to work towards a common theme (1985a: pp. 7-8).

Clearly, there are many economic benefits to be derived from the promotion and development of such a route.

Several studies have dealt with the establishment of parks along the old and new canals.

Almost all the remains of the old canals are on public lands, much of which is already parkland. It should be noted that almost all the significant remains of the Second and Third Canals - there are virtually no remains of the First Canal - are found in St. Catharines and Thorold.

A twenty mile bicycle and hiking trail has already been completed along the old and new canals. This trail - developed by the Welland Canal Preservation Association and, to a lesser

extent, by Public Works Canada - stretches from Martindale Pond in St. Catharines to southern Port Colborne. Thus, a linear park system along the Welland Canals already, in a sense, exists. However, more ambitious plans for the Welland Canals have been formulated.

In 1981 the Ad Hoc Welland Canals Group consisting of 19 interest groups, agencies, and governments was established. The main objective of this group is: "to develop a co-ordinated approach to the preservation and development of the Welland Canals" (Regional Niagara Planning and Development Department, Report 1537: 1).

There are, according to the Regional Planning Department (Report 1537), three options available to develop the Welland Canals in a co-ordinated manner. These include:

- 1) continuation of the present situation of each group carrying out its individual programs.
- 2) formulation of a special purpose body such as (a) crown corporation/parks commission. A similar alternative would be the expansion of an existing independent agency such as the Niagara Parks Commission.
- 3) a co-operative effort based on existing public and private organizations, but with leadership and financial assistance from one or more sources (Report 1537: 4-5).

Each of these options has some serious shortcomings.

The Ad Hoc Welland Canals Group would like a special purpose body (option 2) to take responsibility over the ownership, preservation, and development of the historic canals.

Unfortunately, this option may not be feasible. Before discussing the feasibility of this option the drawbacks of options 1 and 3 will be examined.

Option 1 may be unworkable because of a lack of funds and the problems associated with co-ordinating the efforts of many groups.

The main limitation of option 3 is that it would be very difficult to implement because - as with option 1 - it would be difficult to co-ordinate the efforts of the different agencies. The lack of funding would also pose an obstacle to this option. Furthermore, it may be impossible to find an agency that would be willing - and is able - to assume leadership over the development and preservation of all the historic Welland Canals.

Option 2, the one favoured by the Ad Hoc Welland Canals Group, has several major shortcomings.

Niagara's planning framework is already fragmented among too many agencies; thus the creation of another agency responsible for the planning and management of a large area in Niagara would further complicate efforts to plan on a regional, rather than a piecemeal, basis. The creation of a new agency would also take control of certain lands away from the St. Lawrence Seaway Authority and several municipalities. Thus, these bodies may object to a new Welland Canals agency. It is also highly doubtful that the funds for the development of such an Agency exist.

A corollary to option 2 is to have an existing agency - such as the Niagara Parks Commission - own and manage a park system along the canals.

Bill Lewis (1986), in a paper submitted to Brock University's Institute of Urban and Environmental Studies,

proposes that a Welland Canal Parkway following the Fourth Canal be developed along the lines of the Niagara Parkway. Lewis suggested that this parkway be managed by the Niagara Parks Commission. His proposals included, among other things, the development of a campground along the canal at Port Colborne, placing picnic tables along the parkway, and building several museums and observation areas along the canal.

From his research, Lewis determined that:

...developing the Welland Canal Park System could definitely be accomplished by the present managerial staff operating the Niagara Parks Commission (1986: 35).

Implementation of this parkway scheme would, however, require a substantial increase in the size of the Niagara Parks Commission (in terms of employees and capital).

This concept of setting up a parkway along the Welland Canals has a great deal of appeal; however, it may not be economically viable because a Welland Canal Parkway would almost certainly be dependent on heavy government subsidies, particularly during the initial development stage, because new roads would have to be constructed along much of the canal; furthermore, buildings would have to be constructed, extensive landscaping would be required, and lighting systems would have to be installed.

A simple comparison between the Niagara Parks and any proposal for a Welland Canal parkway helps to illustrate the shortcomings of the latter concept.

Obviously, the greatest asset of the Niagara Parks is

Niagara Falls itself. The Falls attracts so many tourists that the Niagara Parks earns a substantial proportion of its revenue from the sale of souvenirs and food at various outlets along the parkway; most of which are concentrated in the area adjacent to the Falls.

The Niagara Parkway also has two important anchors: Niagara-on-the-Lake, a popular tourist destination, and Fort Erie, an important border crossing point. Being on the closest border crossing point to the Metropolitan Toronto area is yet another one of the Niagara Parkway's advantages.

Aside from the locks in St. Catharines, Thorold, and Port Colborne, there is not much of interest along the Fourth Canal (most of the remnants of the old canals are not, and could not be, considered for this or any other such parkway scheme because, in most cases, roadways accommodating cars could not be built along the old canals).

The Welland Recreational Waterway is really the only other attraction on the canal between the locks of Thorold and the lock at Port Colborne but - as mentioned earlier - the recreational opportunities of this waterway are available in other nearby areas that have much more to offer to the tourist.

One other advantage of the Niagara Parks that should be mentioned is the revenues it receives from water rentals. In 1985, the Niagara Parks Commission received about sixteen per cent of its revenues from water rentals to hydro-electric companies (The Niagara Parks Commission, 1985). A park system along the Welland Canal would not have such an unusual source of

revenue.

Due to its tremendous advantages the Niagara Parks Commission is a profitable venture. In 1985 the Commission had a net profit of about \$3.7 million (Niagara Parks Commission, 1985)*.

It seems very unlikely that a Welland Canal linear park system could be profitable, especially considering the fact that it would be in competition with the Niagara Parks.

There is unlikely to be a market large enough to justify more than two or three souvenir stores along the canals. Furthermore, any campgrounds along the canal would face very stiff competition from existing campgrounds at choice locations such as the Lake Erie and Lake Ontario shorelines. Other revenue generating facilities along the canal would also face the problems of competition or lack of sufficient markets.

It should also be recognized that entrusting the Niagara Parks Commission with the responsibility of maintaining a Welland Canal Parkway could risk the quality of service this Commission now provides at the Niagara Parks. Conversely, since the Niagara Parkway is the Niagara Parks Commission's chief concern; the NPC could neglect a Welland Canal Parkway under its jurisdiction.

So far, a rather pessimistic view of the Welland Canal Parkway concept - operated either by the NPC or a separate body - has been presented. Obviously, though, there are many

*Excess of income over expenditure.

advantages to such a proposal.

As alluded to earlier, the promotion of tourism along the Welland Canal could encourage visitors to the region to stay longer, and to visit communities like Welland, Port Colborne, St. Catharines, and Thorold.

At a recent symposium on the Welland Canals, a planner from the U.S. discussed how a canal redevelopment scheme helped revitalize a declining American town.

The U.S. Federal Government declared parts of Lowell, Massachusetts an Industrial Heritage Park and provided money to renovate several old industrial buildings along its derelict canal system.

This provided the needed spark for continued renewal of the area. Local politicians, community groups, and private industry were soon collaborating in an effort that has seen the area become Lowell's centre-piece. Increased employment, tourism, and the establishment of high tech industries have been among the spin-offs (Welland Tribune, Mar. 24, 1986).

The city of Welland has an abandoned canal running through it, but plans to develop it for tourism and recreational purposes have been stalled because the Federal Government has frozen funding for the project.

Historic canalside communities such as Thorold, Port Robinson, and Port Colborne could also benefit from a Welland Canal Parkway, or anything else that encourages more tourism along the canal. A parkway could heighten public awareness of the historical resources of these communities, thus encouraging more heritage preservation. Heritage preservation and increased tourism could lead to the revitalization of the downtown cores

of these communities.

The flight locks of the Fourth Canal are undoubtedly the most fascinating section of the Welland Canals. Adjacent to these flight locks are the remains of the locks of the Third Canal at the escarpment. These remains are "substantial and interesting" (Ministry of Culture and Recreation, 1979: 101), and several reports have suggested that a park be developed there. A park in this area would provide visitors with the opportunity to view ships passing through the flight locks from the remains of the previous canal's locks. If this area were properly developed it could become a tourist attraction of provincial, if not national, significance.

The potential also exists to develop entirely new points of interest along the historic canals such as a tourist complex at Welland, an observation tower adjacent to the flight locks, a replica of an old canalside village, and other attractions.

The old canalside village concept was suggested by a student at the University of Waterloo. Anne Wilmot (1985) suggested that an old village could be recreated along an abandoned section of the Welland Canal atop the escarpment in Thorold. This recreated village could:

...be a "living museum" of canal life in the nineteenth century. An "avenue of ships" displaying historic vessels could be incorporated into the village scene and moored in the unused waterway (1985: 48).

Admittedly, this concept could be very expensive to implement, however, if it were phased in over a long period of time it could become a major tourist attraction without becoming a

serious financial burden.

The tourism potential of such a development is good because Niagara Falls' main tourist areas and the flight locks are within close proximity to the proposed site of this village (across the canal from Thorold South).

In summation, massive expenditures on tourism development along the canals is unlikely to be a panacea for the communities along them. Plans for a parkway along the existing canals, or a tourist complex at Welland, may be very appealing; however, since tourism is an industry, the returns on investment of these projects, among other things, must be seriously considered before they are undertaken. There is, however, no doubt that the Welland Canals have a great deal of tourism potential that has yet to be exploited.

CHAPTER EIGHT

IMPACTS

Tourism can have a wide range of impacts, both good and bad, on an area. Maximizing the good impacts and minimizing the bad impacts is obviously desirable, but to achieve these ends the extent of these impacts must be known. Thus, this chapter will examine the actual and potential socio-economic and environmental effects of tourism in Niagara.

Positive Impacts

One of the major advantages of tourism is the fact that it:

...provides both the incentive for conservation and the economic means by which such measures can be carried out. Part of a region's income from tourism can be invested in the maintenance of scenic areas and historic sites (Mathieson/Wall, 1982: 98).

Niagara has certainly benefited from tourism in such a way.

An interest in attracting tourists has encouraged the preservation and restoration of much of Niagara's heritage. Most of the historic buildings in downtown Niagara-on-the-Lake, for example, house businesses catering to tourists. The

restoration of Port Dalhousie in St. Catharines is also largely aimed at improving the area's tourism potential.

Tourism has also provided the impetus to preserve many of the natural areas in Niagara. Tourism, for example, provides one of the main rationales for preserving the Canadian side of the Niagara River in a relatively natural state. In fact, it is one of the stated goals of the Niagara Parks Commission to "... encourage and promote the development of the tourism industry in Ontario and Canada" (Seibel, 1985: 2).

Due to tourism there are more recreational, shopping, and entertainment facilities in Niagara than the area could otherwise expect. There are, for example, several large amusement parks in the region; there are almost a thousand picnic tables along the Niagara Parkway alone; there are also many specialized stores catering to tourists in Niagara Falls and Niagara-on-the-Lake, and the list goes on.

The potential for concerns over tourism to spark greater interest in the abatement of pollution, and the preservation of fruitlands, is - as was alluded to earlier in this paper - yet another advantage gained from tourism in the region.

If Niagara is to realize its full tourism potential, the issue of the pollution of waterbodies in and around the region must be addressed.

Niagara's fruitlands are part of the unique physical character of the region that draws many visitors to the area. This contribution provides a sound economic reason for preserving Niagara's fruitlands.

Tourism can directly benefit Niagara's fruit growing industry by encouraging the development of certain facilities that will benefit both the farming and the tourist sectors. Additional reservoirs in the countryside could, for example, serve the dual purpose of providing more outdoor recreational opportunities for tourists and providing farmers with a more reliable water supply. Such a reservoir is operated by the Niagara Peninsula Conservation Authority at Binbrook, a small community outside the Niagara Region and south of Hamilton.

Dual purpose reservoirs need not be large. Small reservoirs could be used for fishing, paddle boating, and swimming. Furthermore, the areas around them could be landscaped to accommodate activities such as picnicking. The Virgil Dam Conservation Area in Niagara-on-the-Lake has the potential to be developed in such a manner.

Tourism can also encourage the development of other facilities (i.e., rural roads, farmers' markets) that benefit the farming community. Furthermore, farm vacations in the Niagara Region could be developed and promoted to supplement the incomes of farmers and to provide them with an incentive to continue farming.

Thus, it is possible for tourism development to be integrated with environmental concerns to extend the benefits of tourism to those who are not directly or indirectly involved with the industry.

Finally, the single most important positive impact of tourism in Niagara, in most people's minds, is its potential

economic impact. Unfortunately, there is not much reliable data on the economic impact of tourism in the region. In the city of Niagara Falls, though, it is estimated that tourists spent \$300 million in 1983; furthermore, 9,100 people were directly employed by the city's tourist industry that year (Pannell Kerr Forster, 1985). A more detailed examination of the economic impacts of tourism is presented in Appendix Two.

Negative Impacts

The negative impacts of tourism on Niagara represent some of the costs of tourism to the region. Although a dollar value cannot be applied to these costs, it is essential that they be considered because the success of a tourism industry cannot be measured in isolation of its costs.

During the peak tourist season, particularly during the weekends, there is a great deal of congestion on some of the region's roadways, and at many of the region's parks and attractions. The Queen Elizabeth Way - Niagara's busiest highway - gets particularly crowded during the tourist season. Picnic and recreational areas along the Niagara Parkway and the Lake Erie shoreline can also become extremely crowded with tourists during summer weekends. All this congestion makes access to the region's recreational facilities difficult for many of the area's local residents.

Tourism can have a particularly significant impact on those living in districts frequented by tourists. There have, for example, been many complaints by residents of Niagara-on-the-

Lake that: "the annual influx of 2 million visitors is ruining the community" (The Toronto Star, March 14, 1986). Due to tourism, Niagara-on-the-Lake suffers from: streets overcrowded by cars and tour buses, too many people on the streets, a lack of services catering to local residents, and other problems.

Resentment towards tourists simmers among some residents of areas that are often inundated by tourists. G.V. Doxey (1979), a specialist on the environmental effects of tourism, constructed an "index of tourist irritation" (see Table 8.1) and applied it to Niagara-on-the-Lake in 1974. This study is obviously old; nonetheless, several recent newspaper reports suggest that it has some applicability to the situation in the town today. Doxey concluded that: "the community is rapidly reaching the stage of irritation and soon may pass it..." (1979: 298). It is impossible to make a generalization for the whole community; but it seems clear that the stage of irritation has already been reached by many of the town's residents. Similar problems may be developing - or may have already developed - in Niagara Falls, and communities along the Lake Erie shoreline.

It should be noted that Doxey's Irritation index is just a hypothesis. There is not enough empirical evidence to suggest that host communities are likely to progress through the five stages identified by Doxey in a linear fashion.

In their book, Tourism: Economic, Physical and Social Impact, Mathieson and Wall (1982) suggest that three factors affect the tolerance of tourists by host communities. These three factors are:

Table 8.1

An Index of Tourist Irritation

1. The Stage of Tourist Euphoria. People are enthusiastic and thrilled by tourist development. They welcome the stranger and there is a mutual feeling of satisfaction. There are opportunities for locals and money flows in along with the tourists.
2. The Stage of Apathy. As the industry expands people begin to take the tourist for granted. He rapidly becomes a target for profit-taking and contact on the personal plane begins to become more formal.
3. The Stage of Irritation. This will begin when the industry is nearing saturation point or is allowed to pass a level at which the locale cannot handle the numbers without expansion of facilities. The resulting pressures on all services and the crowding during the season will begin to turn the apathy of the locals into irritation. They begin to complain among themselves and begin to feel that the tourist is "stealing" something from them. The stores are crowded -- they cannot easily find parking -- they see congestion everywhere and while their community may now be extremely prosperous, largely because of the tourist, they have now forgotten this fact in the face of what they look on as a disturbance of their former lifestyle.
4. The Stage of Antagonism. The irritations become more overt. People now see the tourist as the harbinger of all that is bad...Mutual politeness has now given way to antagonism and the tourist is "ripped-off".
5. The Final Stage. All this while people have forgotten that what they cherished in the first place was what drew the tourist, but in the wild scramble to develop they overlooked this and allowed the environment to change. What they must now learn to live with is the fact that their ecosystem will never be the same again. They might still be able to draw tourists, but of a very different type from those they so happily welcomed in early years. If the destination is large enough to cope with mass tourism it will continue to thrive.

Source: Doxey, 1979: 297-298.

1. The cultural and economic distances between tourists and hosts.
2. The capability of the destination and its population to physically and psychologically absorb tourist arrivals without undermining or squeezing out desirable local activities.
3. The rapidity and intensity of tourist development (p. 141).

The first factor is probably not too relevant to Niagara; however, the second and third factors are.

The second factor is particularly relevant to small communities like Niagara-on-the-Lake because such communities are the least likely to be capable of absorbing an influx of tourists; mainly because the ratio of tourists to local residents could be extremely high in such small towns. Furthermore, it is far easier for tourism to dominate the socio-economic realm of a small town than a big city.

Rapid and intense tourism development is also likely to have a great impact on smaller communities, because such development is likely to dramatically alter the lifestyles of the residents of these communities. People in small quiet communities who are familiar with many of the other local residents would be particularly affected by the influx of strangers, and the noise and congestion that often result from tourism; particularly if this transformation of a small quiet town occurred over a short period of time.

One can conclude that the social impacts of tourism are likely to be greater in small communities than in large communities, like Toronto, which can absorb many tourists

(mainly because the ratio of tourists to locals is unlikely to be overwhelming in such cities). These factors support the argument that tourism activity in Niagara should be dispersed to many parts of the region; obviously because such dispersion would help reduce the problems associated with large concentrations of tourists in just a few centres.

Tourism can also lead to the destruction of parts of a community's heritage. Again, in Niagara-on-the-Lake, many residents are concerned about the loss of their historical heritage to tourism development. Many historical buildings in the town have been incorrectly restored to suit the needs of the tourism industry. Furthermore, on the town's main street, a building erected in the 1840's was recently demolished to accommodate the expansion of the adjacent hotel, despite a great deal of opposition from townspeople. Fortunately, the preservation of Niagara-on-the-Lake's heritage may be made easier now that a bylaw declaring Niagara-on-the-Lake's downtown core a Heritage Conservation District has been passed by the town council.

Tourism has also resulted in the over-development of certain areas. In Niagara Falls:

The integrity of the Niagara Falls scene is now threatened by the intrusions of viewing towers, high rise buildings and commercial features...If unchecked, the steady build up of new construction on the skyline will result in an artificial encirclement that will overshadow and stifle the magnificence of the park system and the Falls themselves (Miele, 1979: 56).

The construction of broad roadways and huge parking lots adjacent to the Falls has also diminished the natural beauty of

the area. Furthermore, the Niagara Parks Commission operates a large retail and food complex (Table Rock House) consisting of two buildings almost at the brink of the Horseshoe Falls. This complex adds to the congestion of this popular viewing area.

In Niagara-on-the-Lake, threats of over-development are looming on the horizon. There are currently several proposals for new hotel developments in the town. There have also been suggestions that more fast food outlets should be allowed downtown. It is almost certain that the special ambience of historic Niagara-on-the-Lake would be diminished by the development of several fast food outlets downtown; mainly because such establishments would reduce the authenticity of the historic town.

In summation, over-development consisting not only of too much development, but also of development that is not compatible with its surroundings, is one of the many problems brought on by tourism in Niagara.

Evidence suggests that tourism may be having some detrimental effects on agricultural production in Niagara.

According to a Regional Planning Department study:

There are 138 recreation/open space uses identified in Niagara outside the Urban Areas Boundaries. Of these, 99 (72%) were located on good agricultural land (Regional Niagara Planning Department, 1982, p. 6).

Obviously, not all of the 138 sites cater to tourists; however, a large proportion do. These 138 sites include campgrounds, about half of which are on good agricultural land (RNPd, 1982: 6).

The impact of recreation (which includes tourism) on agriculture extends beyond the consumption of prime land; in many cases recreational land use is not compatible with agricultural land use.

According to Ontario's Provincial Foodland Guidelines:

...a compatible use in an agriculture designation includes land uses in support of agriculture, as well as uses which, while not related to agriculture, can continue adjacent to agriculture, without conflict and permit the land to be used for food production in the future (RNPd, 1982: 3).

Unfortunately, conflicts between recreational and agricultural uses do occur in Niagara, and evidence suggests that once a piece of land is developed for recreation, it is unlikely to revert to agricultural use.

Some of the conflicts between farming and recreational uses are relatively minor. The owner of a campground surrounded by fruit farms, for example, supposedly asked farmers to "stop spraying and to turn off bird bangers when these activities continued late into the evening" (RNPd, 1982: 11). The owner also complained about cars that were parked on the road due to the farmer's "pick your own fruit" operation.

Conflicts of a more serious nature also exist between farming and recreational uses. Pilferage from fruit trees and trespassing onto farmland are two major problems on some farms adjacent to recreational facilities. In fact, one farmer next to a private campground had to take his land out of production because people were stealing too much of his produce (RNPd, 1982).

The Niagara North and South Federations of Agriculture have

identified a number of other conflicts. These include the: "destruction of four acres of grapes from herbicides sprayed by an adjacent golf course; destruction of crops and fences; complaints about smells from a chicken barn by a nearby golf course; harassment of farm animals", and so forth (RNPD, 1982: 61).

It has been suggested that the degree to which a recreational use has an impact on adjacent farms is the result of such factors as:

The size and intensity of activity carried out by the recreational use.

The type of recreational facility.

The nature of the particular type of farming activity in the surrounding area. Fruit growing areas and livestock operations appear to be the most susceptible to impacts from nearby recreation uses.

The degree to which the recreation facility is buffered or separated from adjacent agricultural uses (RNPD, 1982: 3).

Generally speaking, busy campgrounds are likely to have the greatest impact on farmlands.

The Provincial Foodland Guidelines suggest that land uses that are compatible with agriculture: "should permit the land to be used for food production in the future" (RNPD, 1982: 3).

According to this definition, recreational uses are unlikely to be compatible with agriculture because:

There were no examples found in Niagara where recreational uses have reverted back to agricultural production. Conversion, while theoretically possible, does not seem likely in most cases in view of the physical improvements made to the land by recreational development, such as alterations in soil composition, compaction, topography, and drainage. It is also considered economically improbable in view of the amount of money spent on these land improvements (RNPD, 1982: 14).

There is also evidence to suggest that recreational uses in farming areas increase pressure for other non-farm uses to be developed in these areas (i.e., roads, buildings, etc.).

The increasing use of Niagara District Airport by tourists could also result in the loss of more of the region's prime agricultural land. The airport is located in a major fruit growing area in Niagara-on-the-Lake. Increasing use of this airport by tourists could lead to an expansion of its facilities, and to its encroachment onto adjacent agricultural lands.

Aside from land use conflicts, tourism may adversely affect Niagara's agricultural industry by increasing the demand for workers during the summer season. It is doubtful that the farmers of any of Canada's other agricultural regions have to face the competition for labour that Niagara's farmers must face. As a result of this competition, perhaps combined with other factors, the agricultural industry in Niagara suffers from serious labour shortages; in fact, the situation is so bad that some farmers have to import labour from the Caribbean during the summer.

The effect of the tourism industry on the supply of labour during the summer is just one example of how tourism aggravates the seasonality of Niagara's economy. As alluded to earlier in this paper, unemployment in Niagara rises significantly during the winter because the agricultural, tourism, and shipping sectors become virtually dormant during this period.

Tourism may have a number of other impacts on parts of the Niagara region. Tourism in the region may, for example, promote

crime. "A number of empirical studies indicate 'a positive relationship between increases in tourism and crime rates'" (Mathieson/Wall, 1982: 150). This may partially explain why Niagara Falls has the highest crime rate in Niagara (Niagara Falls Review, November 30, 1984). The main crimes affecting tourists and tourist operators in the city are break ins, vandalism, and theft from cars and motel rooms (Niagara Falls Review, November 30, 1984).

In summation, tourism in Niagara has a number of positive and negative impacts on the region. Obviously, the positive impacts must be cultivated, and the negative impacts must be minimized; however, such goals can only be achieved by managing and developing tourism as an integral part of the social and environmental fabric of Niagara.

CHAPTER NINE

TOURISM INDICATORS

Figures relating to the tourism industry in Niagara suggest that fluctuation is a dominant characteristic of tourism in the region.

Accurate figures relating to the flow of tourists to the region are scarce; however, a survey of numerous data sources suggests that approximately 16,000,000 tourists now visit the Niagara Region each year.

Visitation to Niagara Falls peaked in the early 1970's; however, after 1971 the number of visitors to the region began to decline until the late 1970's (Regional Niagara Planning Department, 1983a). This decline was probably due to a combination of such factors as the increase in oil prices and the onset of poor economic times. Niagara's tourism industry has now basically recovered from the declines of the previous decade.

The variability of visitation to Niagara Falls attests to the unpredictability of tourism activity. Such unpredictability has serious ramifications for areas that depend heavily on tourism because these areas are more likely to be adversely

affected by a decline in visitation.

Figure 9.1 indicates that the number of bus permits issued by the Niagara Parks Commission increased substantially during the latter part of the 1970's; however, the number of permits issued has declined since then. The total traffic recorded in the Niagara Parks System (Figure 9.2) has not changed significantly since 1975, although the traffic at Queen Victoria Park (the park adjacent to Niagara Falls) has increased by about 18 per cent since 1975. Furthermore, attendance to attractions in the Niagara Parks increased substantially during the past few years; in fact, attendance to these attractions in 1985 was 25 per cent higher than in 1983 (Niagara Parks, 1985).

Figures 9.3 and 9.4 illustrate camping attendance at five of Niagara's campgrounds. Together, these five campgrounds should provide a rough idea of the camping situation in Niagara because they represent a broad range of localities in the region: the Ball's Falls and Chippawa Creek Conservation Areas are located in Niagara's interior, the Long Beach Conservation Area is on Lake Erie, the Miller's Creek campground is next to the Niagara River, and Charles Daley Park is on Lake Ontario. The three Conservation Areas are owned by the Niagara Peninsula Conservation Authority (N.P.C.A.), the other two parks are owned by the Niagara Parks Commission. The number of campsites located at each of these campgrounds varies:

Ball's Falls	- 60 sites (approximately)
Chippawa Creek	- 106 sites
Long Beach	- 300 sites
Charles Daley	- 65 sites
Miller's Creek	- 54 sites

Figure 9.1

Figure 9.2

Source: Niagara Parks Commission, Annual Report

Figure 9.3
CAMPING ATTENDANCE AT CONSERVATION AREAS: 1974-1983

Source: Niagara Peninsula Conservation Authority
Annual Reports

Figure 9.4

ATTENDANCE AT NIAGARA PARKS COMMISSION CAMPGROUNDS

NOTE: Attendance at Charles Daley Park also includes day-visitors, however, the park is mainly a campground.

Source: Niagara Parks Commission, Annual Reports

Attendance at the Ball's Falls Conservation Area has been very low, probably because the campground is not close to a major travel route, and it does not offer any swimming opportunities. Camping facilities are no longer available to the general public at Ball's Falls because of the poor attendance record of its campground (the campground was closed after the 1985 season).

The downturn in business at the Chippawa Creek Conservation Area is probably a function of its location. The campground is not on a lake or a major transportation route; thus, the campground operates at a locational disadvantage compared to other campgrounds in the southern part of the Niagara Region.

Unfortunately, the N.P.C.A. does not have figures available relating to camping attendance at its Conservation Areas during the years 1984, 1985, and 1986.

The illustration of attendance to Charles Daley Park (Figure 9.4) includes day visitors. The major fall in attendance (starting in 1980) coincides with the closure of beaches along the Lake Ontario shoreline of Niagara. As with St. Catharines, the beaches at this park are often polluted. Thus, the declining attendance to Charles Daley Park may reflect a reduction in the number of day visitors from nearby communities who frequented the park before the 1980's seeking swimming opportunities. The campground itself remains fairly busy, particularly because the park is on the heavily-used Q.E.W. highway.

The Miller's Creek campground has had a fairly steady level

of attendance since 1979, with about 8,000 campers visiting each year. Such a low level of attendance, even at such a small campground, suggests that there is much unused camping capacity at this park. This could be partly because there are many large campgrounds nearby that are closer to Niagara Falls.

One conclusion that can be drawn from this analysis of campgrounds is the fact that even good locations do not guarantee a campground a large and stable market.

Figure 9.6 illustrates accommodation unit occupancy rates (percentage of hotel/motel rooms filled) for the province, the Festival Country Travel Region, and the city of Niagara Falls. Clearly, Niagara Falls has an extremely high seasonal fluctuation of occupancy rates. Such a high level of fluctuation is unfortunate because it represents a great deal of excess accommodation capacity during the off-season, and over-crowding during the peak season. Seasonal occupancy fluctuations of a more moderate nature also occur in Festival Country and the province as a whole.

Figure 9.6 illustrates tourism occupancy rates in the municipalities of Niagara. St. Catharines, Thorold, Lincoln and Grimsby have the highest occupancy rates in Niagara during the off-season; this means that the accommodation sector in these communities receives a more even flow of tourists throughout the year than the accommodation sectors in other municipalities, mainly because St. Catharines, being as large as it is, attracts people for a variety of reasons that are not influenced by the seasons; the adjacent municipalities of

Figure 9.5
OCCUPANCY RATES: SEASONAL VARIATIONS

Source: Ministry of Tourism and Recreation,

Lincoln and Thorold would also benefit from the flow of visitors to St. Catharines. Most of the hotels and motels in Niagara-on-the-Lake are too far from St. Catharines to capture a share of this market. It should also be noted that the motels in Thorold that are just outside the Niagara Falls border are not considered to be within Thorold in the data presented in Figure 9.6.

As Figure 9.6 indicates, Port Colborne and Wainfleet have the lowest peak season and off-season occupancy rates in Niagara. The costs of building, maintaining, and operating hotels and motels in these communities may, however, be lower than in the larger towns and cities, thus low occupancy rates do not automatically suggest that hotels and motels are unprofitable. Furthermore, the hotels and motels in Port Colborne and Wainfleet probably have relatively low overhead costs because they do not offer the extensive range of services and facilities available in higher quality establishments; thus, the accommodation sector in this area probably has a lower occupancy threshold for survival than most other areas. Nonetheless, the low occupancy rates do suggest that there is an oversupply of accommodations in the area.

In conclusion, the one characteristic that stands out in this analysis of Niagara's occupancy rates is the fact that during the off-season, which is most of the year, much of the accommodation sector in Niagara suffers from very low occupancy rates.

The main point that emerges from this chapter is the fact

Figure 9.6

OCCUPANCY RATES

P Peak Season occupancy rates: mid-June to the first week of September.

L Low Season occupancy rates: off-peak period.

Niagara Falls

St. Catharines/Thorold

Niagara-on-the-Lake

Port Erie

Lincoln/Grimsby

Welland/Pelham

Port Colborne/Wainfleet

0 10 20 30 40 50 60 70 80 90 100
Hotel/Motel Occupancy Rate (%)

that tourism in Niagara is a very unpredictable economic activity. Throughout the year, and over the course of several years, tourist flows to Niagara vary considerably. The reduction of these fluctuations is essential if the benefits of tourism to Niagara are to be optimized.

CHAPTER TEN

MARKET ANALYSIS

A crucial step in the tourism planning process is to determine who the tourists are and what they want; thus, some of the main tourist market studies that are relevant to Niagara's tourism industry will be discussed here.

The U.S. Pleasure Travel Market Study

Some degree of fluctuation notwithstanding, about half of the tourists to Niagara are from the United States. Thus, this study by Tourism Canada (1985) is of great significance to Niagara's tourism industry.

The study narrows down the types of pleasure trips taken by the U.S. public into eight categories (see Table 10.1): Visiting friends and relatives, Touring, Close to home leisure, Outdoor, Resort, City, Themepark/special event, and Cruise trips. As Table 10.2 indicates, Canada seems to exert the greatest pull on those interested in touring. The "visiting friends and relatives" and "outdoor" trip types are also important to Canada. The "close to home leisure trip type" is particularly relevant to Niagara because of the region's

Table 10.1

Pleasure Trip Categories of the U.S. Pleasure Travel
Market Survey

A visit to friends and relatives is a trip whose primary purpose is to visit and spend time with friends or relatives.

A close-to-home leisure trip is a trip to a place close to home where you can enjoy facilities related to a beach, lake, seashore or park.

A touring trip is one by car, bus or train through areas of scenic beauty, cultural or general interest.

A city trip is a journey to a city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city.

An outdoors trip occurs in a natural area where you may engage in activities such as camping, hunting, fishing, hiking or rafting.

A resort trip is a journey to a resort or resort area where a wide variety of activities such as beaches, skiing, golfing, tennis and so on, are available nearby or on the premises.

A cruise is a trip on a cruise ship where you enjoy all the on-board activities and planned stops at points of interest along the way.

A trip to a theme park, exhibition or special event is taken primarily for the purpose of visiting a major theme park or exhibition or special event.

U.S. Pleasure Travel Market Survey.

Table 10.2

Distribution of Canada's Share of Eight Trip Types Taken
by Americans

<u>Trip type</u>	<u>Trips to Canada % of total trip nights</u>	<u>Structure of U.S. pleasure travel market based on % of total trip nights</u>
Visiting friends and relatives	23	44
Touring	37	14
Close to home leisure	6	13
Outdoor	20	10
Resort	3	8
City	8	7
Themepark/Special event	2	3
Cruise	1	1

U.S. Pleasure Market Survey, 1985.

proximity to the United States.

Only the "touring" and "outdoor" trip types will be examined in detail here because, for the time being, they seem to offer Niagara the greatest potential for expanding its tourism market. The "close to home leisure" trip type is not being discussed here because such trips already constitute a large proportion of the trips taken to Niagara (judging by other data that will be presented in this chapter); thus, there does not seem to be a need to encourage such trips into Niagara - except during the off-season. The "visiting friends and relatives" category will not be elaborated on because friends and relatives are not private or publicly owned tourist attractions that can be promoted or developed. The other trip types are not being examined because they currently offer little scope for exploitation by Niagara's tourism industry.

a) Touring

A touring trip is, on average, eight days long and planned well ahead of time. These types of trips involve visiting a number of spots rather than focusing on a single destination. As is indicated in Appendix Four, the tourist can easily spend several days touring Niagara.

Although the car is the single most important form of transportation for this type of trip, 26 per cent of touring Americans travel by air, and 14 per cent travel by bus. Twelve per cent of the people in this category rent a car.

The economic impact of this market segment may be

considerable because 49 per cent of the people in this group stay in motels and 38 per cent stay in hotels. Furthermore, about half of these vacationers are: "looking for first-class accommodation and food, a tendency that generates more revenue for the hospitality sector" (Tourism Canada, 1985: 17). It should be noted that about 20 per cent of these trips involve a package deal.

Obviously, many of the regions in the United States and Canada are engaged in stiff competition to capture a share of the U.S. pleasure market. Canadian destinations, however, have one distinct advantage over American destinations:

Americans perceive Canada's buildings and scenery as foreign. It is Canada's people, cultures, heritage, and ethnic mosaic that makes Canada substantially different (Tourism Canada, 1985: 20).

Such a perception of Canada is significant because 41 per cent of U.S. pleasure travellers feel that it is important to visit a place with a different culture and way of life while on a touring trip.

These attitudes have definite implications for Niagara's tourism industry. Historical sites and historical architecture in the region should be preserved and promoted, and events such as the St. Catharines Folk Arts Festival should be more aggressively publicized. In summation, the region must capitalize on the features that make it unique.

Unfortunately, many Americans seem to feel that Canada is, on the whole, a less attractive destination than their own country. In fact, in relation to the U.S., Americans regard

Canada as being:

- much less popular and well known;
- less exciting, and with fewer things to see;
- lacking first class food and accommodations;
- having a poorer climate (Tourism Canada, 1985: 19).

Although such perceptions may be valid for much of Canada they certainly do not apply to the Niagara Region because:

- Niagara Falls is one of the most popular tourist attractions in the world;
- there is much to see and do in the region;
- there are a number of good hotels and restaurants in St. Catharines, Niagara Falls, Niagara-on-the-Lake, and elsewhere in the region and;
- temperatures in Niagara are similar to those in most of the Great Lakes States of the U.S.

In reality, Niagara has many of the features that appeal to the American touring public; as is corroborated by the findings summarized in Tables 10.3 and 10.4

The preferred characteristics of touring destinations are indicated in Table 10.3. From the descriptions of Niagara in this paper it should be evident that the region has many of the preferred qualities of touring destinations. Participation in most of the top twenty touring activities listed in Table 10.4 is also possible in Niagara.

In conclusion, touring vacationers from the United States are a very lucrative market. Niagara has many of the attractive qualities necessary to draw part of this market; however, these qualities must be promoted; if they are not, Niagara will be unable to compete effectively with other tourist destinations

Table 10.3

What Americans Say About Touring Destinations They
Prefer to Visit

Percentage agreeing that their preferred destination has the
following features:

	%
Sightseeing	
*Beautiful scenery	81
*Lots to see and do	76
*Interesting cities and towns	66
*Many points of interest	59
*Noted for its history	55
Popularity	
*Well-known area	73
*Popular	73
*Well-known landmarks	70
Exciting	
*Not dull	76
Dreamed of visiting	56
Friends would be impressed	50
Exciting nightlife	41
Accommodation and Food	
*First class hotels	53
*Excellent local cuisine	50
*Elegant restaurants	48
*Affordable accommodations	42
Climate	
*Good climate	52
Foreign experience	
Very different	52
Different cultures/way of life	49
*Pertinent to Niagara	

U.S. Pleasure Market Survey, 1985.

Table 10.4
Top 20 Touring Activities of Americans
(In Rank Order)

1. Walking and strolling about.
2. Visiting small towns and villages.
3. Dining at a variety of restaurants.
4. Sampling local cuisine.
5. Visiting natural parks.
6. Seeing wildlife I don't usually see.
7. Being close to mountains.
8. Being by the ocean.
9. Being by the lake.
10. Taking guided tours.
11. Going to zoos and wildlife exhibits.
12. Visiting big cities.
13. Shopping.
14. Attending festivals and ethnic events.
15. Visiting museums and galleries.
16. Visiting science exhibits.
17. Swimming.
18. Exploring wilderness areas.
19. Sunbathing.
20. Dining at elegant, sophisticated restaurants.

U.S. Pleasure Market Survey, 1985.

that may be less appealing, but more heavily promoted.

b) The Outdoors Market

The outdoors trip is the third most popular type of trip to Canada by American tourists. This type of trip is typically taken by young families who have children. Ninety-six per cent of these visitors travel by car, van, or recreational vehicle. The length of the average outdoors trip to Canada is six to seven days. Sixty-five per cent of the people taking this sort of trip stay in campgrounds. These are fairly low-budget type trips; thus, they do not generate as much revenue for the destination as the touring trip types do.

According to the Pleasure Market Survey, Canada's outdoor image has the following weaknesses relative to American destinations (in rank order):

- we are less well known, less popular;
- our climate is not as good;
- as a result we are less suitable for boating, watersports, and swimming.
- we are too far away;
- we offer few points of interest and, as a result, there are fewer things to see and do;
- and finally, the country is a bit too wild.

Most of these perceived weaknesses are refuted in the previous section on touring. Furthermore, it should be emphasized that Niagara offers outstanding opportunities for boating, watersports (i.e., waterskiing, windsurfing, fishing, etc.) and swimming. Finally, Niagara is not, by most standards, wild.

Table 10.5 indicates the preferred characteristics of outdoor destinations. These findings suggest that Niagara has some of the most preferred qualities of an outdoor destination. Furthermore, most of the top twenty outdoor activities identified in Table 10.6 can be engaged in within Niagara.

What is not mentioned in Tables 10.5 and 10.6 is the fact that many American outdoor travellers prefer to have a fairly tame vacation experience with many of the modern day amenities available. Thus, Niagara has the potential to attract many such travellers by promoting its well-equipped campgrounds.

In summation, Niagara appears to be the type of destination that would appeal to many U.S. outdoor pleasure travellers. Thus, the promotion of the attractions of Niagara would be in the best interests of both the region, and the American outdoor travellers who are within driving distance of Niagara.

Canadian Tourism Attitude and Motivation Study

The Canadian Tourism Attitude and Motivation Study (CTAMS, 1985) was conducted on behalf of the Department of Regional Industrial Expansion (Tourism)* to determine the various travel market segments of the Canadian public. These segments were identified on the basis of the behaviour and attitudes of the Canadian public. Only the key findings of this study will be presented here.

*To be referred to as DRIE.

Table 10.5

What Americans Say About Outdoors Destinations They
Prefer to Visit

Percentage agreeing that their preferred destination has the
following features.

	%
Scenery	
*Beautiful scenery	85
Activities	
*Lots to do and see	71
*Hunting/fishing	62
*Hiking/climbing	58
*Many points of interest	63
*Boating/water sports	49
Snow skiing	46
*Historical interest	41
*Swimming	36
Seclusion	
*Not too wild	68
*Rest/relaxation	61
Seclusion/privacy	56
Natural/untouched	43
Exciting	
Real adventure	65
Challenge skills	36
Convenient	
*Not too far away	65
*Not too hard to reach	44
Popular	
*Well-known area	61
*Popular	60
Climate	
*Good climate	56
*Pertinent to Niagara.	

U.S. Pleasure Market Survey, 1985.

Table 10.6

Top 20 Outdoors Activities of Americans

(In Rank Order)

1. Walking or strolling about.
2. Exploring wilderness areas.
3. Being by a lake.
4. Seeing wildlife I don't usually see.
5. Visiting natural parks.
6. Close to mountains.
7. Fresh-water fishing.
8. Swimming.
9. Visiting small towns and villages.
10. Hiking or backpacking.
11. Being by the ocean.
12. Sunbathing.
13. Power boating.
14. Canoeing.
15. Hunting.
16. Sampling local cuisine.
17. Shopping for arts and crafts.
18. Mountain climbing.
19. Indoor activities.
20. Water skiing.

U.S. Pleasure Market Survey, 1985.

Based on their travel philosophies, the Canadian public can be divided into four major cluster groups (the numbers within the brackets indicate the percentage of the Canadian public represented by each group):

- Casual Travellers (27%)
- Low Risk Travellers (23%)
- Planned Adventurers (30%)
- Those who prefer to stay at home (18%) (DRIE, 1985: 12).

The Casual Travellers and the Low Risk Travellers are probably the main components of the Niagara tourist market.

The Casual Traveller is the type who is unlikely to preplan a vacation. These types of travellers like to take short trips whenever they can, and they like to visit a different place on each trip. Among the four cluster groups, the Casual Travellers are the ones who travel the most.

Low Risk Travellers are those who prefer to visit places where the people speak their own language. The people in this category tend to be older than the general population.

The Planned Adventurers are mostly people who prefer to travel long distances and use travel agents to pick the spot they wish to visit. Since the vast majority of tourists to Niagara come by car it is unlikely that the Planned Adventurer makes up a large proportion of the visitors to Niagara.

The Canadian public can also be divided into four groups according to the types of benefits they seek from travel. These four groups are:

- Getaway - 25% of Canadians

- Experience - 22%

- Going Home - 23%

- Active Participation - 13% (DRIE, 1985: 13)

The Getaway, Going Home, and Active Participation groups are the main Canadian travel markets for Niagara. Those belonging to the Experience category are mostly interested in exotic destinations where they can experience new lifestyles.

Those belonging to the Getaway category do not wish to do much at their holiday destination. Many just want to visit friends and relatives. The Getaway category is mostly made up of family units (husband, wife and children). Those in this group tend to take numerous trips.

The Going Home category is mostly made up of people wanting to see the places their families came from. Many in this category also travel to visit friends and relatives. The metropolitan areas of Toronto and Buffalo, which are both near Niagara, probably attract many such visitors; thus, these are significant markets for Niagara. It should also be noted that many belonging to this category wish to visit historical places; they also indicate a preference for visiting places that are safe and secure. Niagara, of course, has many historical places; it is also relatively safe and secure.

The fourth category, the Active Participation group, generally consists of people who like to participate in sports, watch sporting events, and be physically active. Much of this group is made up of single men who take numerous short trips. With its many hiking trails, fishing opportunities, boating

opportunities, and so forth, the Niagara Region has the potential to attract many people from this group.

On the basis of the vacation activities and interests of Canadians the CTAMS identified six main cluster groups. These groups, and the percentage of Canadians belonging to each one, are:

- Outdoors - 30% of Canadians
- Resort - 22%
- Heritage - 8%
- City Culture - 9%
- City Spree - 3%
- Bed & Breakfast - 10% (DRIE, 1985: 13)

Those belonging to the Resort and City Spree groups are probably least likely to visit Niagara.

The people who prefer resorts are inclined to visit warmer climates with beaches and luxury hotels. Those who belong to the City Spree group tend to like shopping, big cities, and night life. People in this group are often young and single and take short trips; they also often stay with relatives while on vacation.

Many of those belonging to the Outdoors category would probably find the Niagara Region an attractive destination. Wilderness tops the list of the type of environment these people seem to prefer; nevertheless, this group also indicates a strong preference for outdoor recreation and rural areas; two features that can easily be found in the Niagara Region.

The Niagara Region would also appeal to many whose

activities and interests fall within the Heritage Category.

This group likes live theatre, museums, local festivals, amusement and theme parks, cultural activities, and historical sites. All of these attractions are available in Niagara.

Much of the Heritage group consists of females 25 to 54 years old who are housewives and/or mothers. Thus, women should be targetted for the promotion of attractions in Niagara that appeal to the Heritage group.

There is some potential for Niagara to attract members of the Bed and Breakfast group because Niagara has most of the features that appeal to this market segment. People in this category prefer indoor activities, budget meals and accommodations, small towns and villages and rural areas. Furthermore, people in this category tend to take short trips to visit relatives, and they often tend to be older women.

The City Culture group is less likely to be attracted to Niagara than the Bed and Breakfast group; nonetheless, some of the interests of the City Culture group do correspond to what the Niagara Region has to offer. Generally speaking, the City Culture group is a fairly sophisticated and well-to-do group that likes: museums and galleries, quality restaurants and hotels, live theatre, big cities, cultural activities, historic sites and parks, and local crafts. Niagara does not have any large outstanding museums; nor does it have any big cities; however, the region has several of the other attributes that the City Culture group prefers. It is worth noting that older women are a dominant element of this group as well.

In summation, the findings of the CTAMS suggest that the Niagara Region has the potential to draw tourists from a fairly broad range of tourist market segments.

Canadian Travel Survey

Tables 10.7 to 10.9 indicate some of the findings of the Canadian Travel Survey (Statistics Canada, 1984). This study examines some of the characteristics of Canadians travelling within the country.

A brief comparison between the Ontario and the general Canadian travel market will be presented here because Ontario is the main Canadian travel market for Niagara.

As Table 10.7 indicates, the travel activity preferences of Ontario residents are similar to the preferences of the average Canadian; however, visiting national, provincial, and regional parks appears to be less significant to Ontario residents than to Canadians as a whole.

In regards to expenditures, Table 10.8 suggests that the types of travel expenditures made by Ontario residents are very similar to those made by the average Canadian traveller. In regards to accommodations though, Table 10.9 indicates that visitors to Ontario are more likely to stay in cottages, and less likely to stay with friends and relatives, than visitors to Canada as a whole.

Since about ninety per cent of the tourists to Niagara are from either the United States or Ontario, the findings of the Canadian Travel Survey that relate to Canada as a whole are not

Table 10.7.

Selected Activities of Travellers Ranked by Degree
of Popularity

Activity	Rank	
	Residence of Travellers Canada	Ontario
Visiting friends/relatives	1	1
Shopping	2	2
Sightseeing	3	3
Local festivals/events	12	10
Attend cultural events	13	13
Nightlife/recreational activities	5	6
Visit zoo/historic site/ natural display	10	11
Visit national, provincial, or regional park	8	12
Attend sports events	9	9
Swimming	6	5
Other water sports	11	8
Hunting or fishing	7	7
Cross-country skiing	15	15
Downhill skiing	14	14
Other sports or outdoor activities	4	4

Statistics Canada, Canadian Travel Survey, 1984.

Table 10.8
Breakdown of Travel Expenditures

	Residence of Travellers	
	Canada %	Ontario %
Prepaid packages	2.2	No Data
Transportation	21.2	23.0
Accommodation	6.0	6.0
Food and Beverages	13.2	14.0
Recreation and Entertainment	4.4	4.6
Other	6.3	5.5
Not Stated	46.5	44.5

Table 10.9

Type of Accommodation Used - By Destination

Accommodation	Destination	
	Canada %	Ontario %
Hotel	8.6	7.3
Motel	6.7	5.5
Camping/trailer park	10.7	10.2
Home of friends/relatives	50.8	44.3
Private cottage	16.1	26.4
Other	6.0	5.7
Not stated	.94	No Data

Canadian Travel Survey, 1984.

of great significance to the region's tourism industry. Nonetheless, an understanding of the Canadian travel market is essential for any tourism industry that hopes to attract a larger share of this market.

Ontario Travel Survey: Festival Country

Ontario's Ministry of Tourism and Recreation has divided the Province into a number of tourist regions. Tourism data for Ontario's Travel Survey (1985) was collected by the Ministry for each of these regions. Niagara is part of the Festival Country tourist region (see Figure 10.1). Festival Country consists of the Regional Municipalities of Niagara, Hamilton-Wentworth, Haldimand-Norfolk, Halton, Waterloo, and the Counties of Wellington and Dufferin. Thus, the following data that was collected from the Ontario Travel Survey does not pertain solely to the Niagara Region; nonetheless, its findings should be relevant to most parts of Niagara. Admittedly though, this data is unlikely to reflect the characteristics of visitors to Niagara Falls and Niagara-on-the-Lake because many of the features of tourism in these two communities are radically different from tourism in the rest of Festival Country.

It must also be noted that this survey pertains only to Ontario residents travelling within the province. Thus, the data provided here indicates the travel habits and characteristics of visitors from within Ontario who visit Festival Country and other parts of Ontario. It is estimated that about 40 per cent of Niagara's tourists are from Ontario.

Figure 10.1

As Table 10.10 indicates, the main mode of transportation to Festival Country is the car; 96.5 per cent of the same day visitors travel by car or van, as do 93.4 per cent of those staying for one or more nights.

One characteristic that emerges several times in this study is the fact that most visitors to Festival Country are only day visitors. In fact, 75.6 per cent of the visitors to the area are day-trippers; for the province, as a whole, only 63.5 per cent of the travellers are day visitors. Table 10.11 indicates that part of the problem is the fact that 59.2 per cent of the travellers in Festival Country are from within this travel region. In no other travel area in Ontario is there such a high incidence of internal visitation. Furthermore, as Table 10.12 indicates, relative to most other travel areas in Ontario, a very large proportion of Festival Country's overnight visitors are also from within the travel region.

In regards to the motivation for travel, Table 10.13 indicates trip purposes by length of stay. Clearly, visiting friends and relatives is the main motivation for visiting Festival Country (this is obviously not the case in Niagara Falls and Niagara-on-the-Lake). Recreation and pleasure are the second most important reasons for visiting Festival Country. It is interesting to note that, in relation to the province as a whole, a substantially smaller proportion of those visiting Festival Country for recreation and pleasure stay overnight.

Table 10.10

Mode of Transportation by Length of Stay -
Festival Country

Mode	Same Day (%)	One or more nights (%)
Automobile/van	96.5	93.4
Bus (scheduled/chartered)	2.8	4.5
Air (scheduled/chartered)	.2	.2
Train	.3	1.8
Ship/boat	-	-
Other	.2	.1

Table 10.11

Same Day Travel by Origin Region

	<u>Destination</u>	
	Festival Country (%)	Province (%)
Festival country	59.2	26.3
Metro Toronto	26.9	17.0
Southwestern	6.4	12.7
Central Ontario	4.1	15.3
Georgian Lakelands	2.9	8.2
Ontario North	0.4	7.9
Ontario East	0.1	12.6
Ontario Travel Survey		

Table 10.12

One or More Nights Travel by Origin Region

Origin	Destination	
	Festival Country (%)	Province (%)
Festival country	30	20.1
Metro Toronto	28.1	31.4
Southwestern	14	11.4
Central Ontario	10.8	13.3
Ontario East	6.3	9.1
Ontario North	5.5	9.8
Georgian Lakelands	5.3	5.3

Table 10.13

Trip Purpose by Length of Stay

Main Purpose	Destination			
	Region		Province	
	Same Day	One or More Nights	Same Day	One or More Nights
	-----x-----			
Visiting friends/relatives	39.1	58.8	32.4	42.9
Recreation/pleasure	33.8	30.4	29.9	44.1
Personal business	9.9	4.9	14.8	6.0
Other business	6.1	3.1	8.7	4.2
Attending convention	1.6	2.4	1.5	2.1
Shopping	9.5	0.5	12.7	0.7

Ontario Travel Survey, 1985.

As Table 10.4 indicates, visitors to Festival Country participate in a fairly broad range of activities. What is interesting to note about the findings on this table is the fact that shopping is the most important activity participated in by travellers to Festival Country. Furthermore, shopping is more important to those who stay in the travel area for one night or more. Another interesting fact is that live theatre, dinner, and music concerts also seem to generate a high proportion of overnight stays - half of the Shaw Festival's patrons require overnight accommodations (The Standard, July 26, 1986).

Table 10.15 indicates the types of accommodations used by visitors to Festival Country. As may be expected, a large proportion of these visitors - 65.1 per cent - stay with their friends and relatives, which is far higher than the provincial average. On the other hand, a much smaller proportion of the visitors to Festival Country stay in private cottages (another form of non-commercial accommodation) in comparison to visitors to the province as a whole. Thus, the percentage of visitors to Festival Country who stay in commercial accommodations balances out to near the provincial average.

As Table 10.16 indicates, the seasonality of travel to Festival Country and the province is somewhat similar. Same day travel, however, tends to be much more seasonal in Festival Country than in the province as a whole.

An itemized list of expenditures by travellers to both Festival Country and the province (10.17) indicates that the proportion spent on each item does not differ very much between

Table 10.14

Activities Participated in at Festival Country by
Length of Stay

Activities	Same Day (%)	One or more nights (%)
Shopping	24	40.1
Outdoor or sporting activity	15.3	24.6
Attended sporting event	6	6.3
Attended live theatre, dance or music concert	2.6	9.0
Visited museums, galleries	2.3	4.5
Historical site	4.6	8.1
Exhibitions, fairs, special events	7.6	8.6
Attractions, zoos, amusement parks	7.3	11.4
Went on boat or rail tours	1.3	2.5
Other activities	42.3	43.5

Ontario Travel Survey, 1985.

Table 10.15

Accommodation

Accommodation	Destination	
	Festival Country	Province
Friends/relatives	65.1	46.2
Private cottage	9.5	25.7
Camping/trailer park	11.7	13.6
Hotel/motor hotel	8.3	5.9
Motel	4.4	2.9
Commercial cottage/cabin	.3	3.3
Resort lodge	.5	2.0
Outfitter/outpost	.1	.5

Table 10.16

Seasonality of Travel by Length of Stay

Festival Country			
Season		Same Day (%)	One or more nights (%)
Jan./Feb./March	20.5	20.7	
Apr./May/June	20.6	19.5	
July/Aug./Sept.	32.9	36.5	
Oct./Nov./Dec.	26.0	23.0	
Ontario			
Jan/Feb./March	23.3	18.9	
Apr./May/June	22.6	22.7	
July/Aug./Sept.	28.0	39.6	
Oct./Nov./Dec.	26.1	18.8	

Ontario Travel Survey 1985.

Table 10.17

Itemized Expenditure

Item	Destination	
	Festival Country %	Province %
Retail/other miscellaneous	22.8	22.6
Food/Beverage	21.5	23.1
Automobile	19.9	19.7
Public transportation - Canadian carriers	18.7	20.5
Recreation/pleasure	9.8	7.0
Accommodation	7.3	7.1

Table 10.18

Average Expenditure Per Traveller Per Trip

Destination Region	\$
Ontario East	63.28
Metro Toronto	62.79
Ontario North	56.50
Southwestern	42.53
Central Ontario	41.26
Georgian Lakelands	38.23
Festival Country	37.76
Provincial Average	48.18

Ontario Travel Survey, 1985.

the province and the travel region.

Table 10.18 indicates that the average expenditure per traveller in Festival Country (\$37.76) is the lowest of all seven of Ontario's travel regions. The provincial average expenditure per trip is \$48.18. The low expenditure per traveller in Festival Country is probably due to the short length of stay of visitors to the area, and the fact that a large proportion of the area's visitors stay with friends and relatives.

Tables 10.19 to 10.22 indicate some of the socio-economic characteristics of overnight travellers in both Festival Country and the province.

As Table 10.19 indicates, about one-third of the overnight visitors to Festival Country are under 25 years old; another third are between the ages of 25 and 44, and the remaining third are 45 years of age or older. This generally corresponds to the provincial breakdown of travellers, by age.

In regards to the occupation (of the chief wage earner of the households surveyed) of overnight travellers to Festival Country; Table 10.20 indicates that most of the travellers to the area (62 per cent) are either professionals, businessmen (executives, owners/managers), or skilled labourers. Less than half of the visitors to Festival Country have post-secondary non-university or university education (43.4%), as Table 10.21 indicates.

Finally, Table 10.22 (household income of overnight travellers) reveals that the province as a whole receives a

Table 10.19

Age of Overnight Travellers

Age	Destination	
	Festival Country %	Province %
Under 15 years	17.1	17.2
15 - 19 years	7.4	6.1
20 - 24 years	10.5	8.7
25 - 34 years	19.1	18.9
35 - 44 years	11.2	14.7
45 - 54 years	11.9	13.5
55 - 64 years	12.2	12.3
65 years and over	10.2	8.4
Did not state	0.5	0.3

Ontario Travel Survey, 1985.

Table 10.20

Occupation (Chief Wage Earner of Household) of
Overnight Travellers

Occupation	Destination	
	Festival Country (%)	Province (%)
Professional, business executive, owner/manager	34.6	33.4
Skilled labour	27.8	30.5
Sales/clerical	12.3	13.9
Unskilled labour	4.0	4.9
Farmer	2.5	1.5
Retired, pensioned	11.6	8.7
Student/unemployed/homemaker	6.8	6.3
Did not state	0.5	0.6

Ontario Travel Survey, 1985

Table 10.21

Education Level of Overnight Travellers

Education	Destination	
	Festival Country (%)	Province (%)
Public/Elementary	7.1	9.3
Secondary/high school	48.2	48.8
Post-secondary (non-university)	15.6	14.3
University	27.8	27.0
No formal schooling	-	0.1
Did not state	1.3	0.6

Table 10.22

Household Income of Overnight Travellers

Household Income	Destination	
	Festival Country (%)	Province (%)
Less than \$12,000	11.3	8.3
\$12,000 - \$17,999	10.6	10.0
\$18,000 - \$23,999	23.5	16.9
\$24,000 - \$29,999	16.2	18.1
\$30,000 - \$39,999	20.1	22.9
\$40,000 and over	15.8	21.9
Did not state	2.5	2.0

Ontario Travel Survey, 1985.

higher proportion of upper income visitors than Festival Country does.

The most important findings of the Festival Country Visitor Profile are not very surprising: the average tourist to the area does not spend very much money, and does not remain in the area very long. The data also suggests that tourism is more seasonal in Festival Country than in the rest of the province. Thus, the Ontario Tourism Survey confirms the existence of many of the problems that plague Niagara's tourism industry.

Regional Niagara Planning Department Reports

Regional Niagara's Planning Department completed a series of extensive reports, between 1983 and 1984, on tourism in the Niagara Region. This section will summarize the main characteristics of Niagara's tourist market that have been gathered from these reports.

According to Niagara's Planning Department the primary tourist market area for Niagara includes the Great Lakes States and Southern Ontario (see Appendix Three). The current population of this area is about 87 million.

A 1983 tourist information booth survey conducted by the Niagara Regional Planning Department suggested that tourists to Niagara have the following characteristics:

- 28 per cent of visitors are children or teenagers.
- 60 per cent of adults are 44 years of age or less.
- 7 to 8 per cent of the visitors are 65 years of age or more.
- 42 per cent of the visiting parties are families (Regional Niagara Planning Department, 194b: 6).

Table 10.23 indicates the reasons cited by tourists for visiting Niagara. The findings indicated by this table suggest that a fairly broad range of activities in Niagara attract tourists.

Finally, Niagara - because of the Falls - receives a greater proportion of first time visitors, than Ontario as a whole. Data suggests, however, that an increasing proportion of tourists to Niagara are making return visits.

Unfortunately, this concludes the presentation of information provided by the Planning Department reports because the remaining data is either inaccurate (the Planning Department admits that some of the findings of its tourism booth survey are biased because of the way they were collected; such findings are not presented here), outdated, or comes from the Ontario Tourism Survey; which, of course, was examined in the previous section.

Tourist Area Traffic and Parking Study

One of the most recent studies dealing with the characteristics of tourists to Niagara Falls is the Tourist Area Traffic and Parking Study (Lanmer Fenco, 1980).

In regards to the length of stay of visitors to the city, the study determined that:

- 10% planned to stay for a few hours.
- 35% intended to stay for one day.
- 55% planned to stay for two days (Lanmer Fenco, 1980: 28).

These figures are somewhat suspect because they suggest that the average length of stay of visitors to Niagara Falls is

Table 10.23

Reasons for Visiting Niagara

Percentage of those surveyed who indicated each reason

	%
Falls and Gorge	62
Entertainment and Amusement Centres	43
Countryside Touring	43
Welland Canals	43
Gardens	39
Historic Interests	33
Shopping	33
Outdoor Activities	30
Obtaining Fruit	28
Visiting friends and relatives	21
Park and/or Picnicking	20
Live Theatre	12
Business and Pleasure	5
Sports or Special Event	4

Source: Regional Niagara Planning Department, 1984b.

relatively long. This seems unlikely because Niagara Falls is a notorious day-trip destination. In fact, the manager of tourism marketing for the Federal government in Ontario was quoted as saying that the "average visitor to the city...spends only 24 minutes here" (Niagara Falls Review, July 19, 1985). A more common figure cited as the average length of stay of visitors to Niagara Falls is two hours.

Among the tourists to Niagara Falls surveyed for this study, it was determined that:

- 35 per cent wanted additional recreational facilities (i.e., amusement parks and water activities).
- 25 per cent wanted more natural features (i.e., gardens, trails) and open air concerts.
- 20 per cent wanted more night life (Lanmer Fenco, 1980: 28).

It is unlikely that more amusement parks will be built in Niagara Falls; in fact, the amusement park at Maple Leaf Village is to be downsized, if not completely eliminated (Niagara Falls Review, January 2, 1986). It should also be noted that the amusement rides at Marineland were built after this study was completed. A large waterslide complex in the Lundy's Lane tourist area has also been completed since this study was conducted. Thus, the need for more amusement parks may have abated. There is still, however, a need for more nighttime activities in the city.

According to the Lanmer Fenco study, the seasonal distribution of tourist arrivals to Niagara Falls is:

- 54 per cent between July 1st and Labour Day.
- 21.6 per cent between April 1st and June 30th.
- 14.4 per cent from Labour Day to October 31st.
- 10 per cent between November 1st and March 31st (Lanmer Fenco, 1980: 78).

Since the completion of this study, the proportion of visitors arriving during the winter has probably increased due to the Festival of Lights.

In summation, the Lanmer Fenco study is not comprehensive; nonetheless, it does provide some insights into the Niagara Falls tourist market that are not available in other reports.

Conclusion

Admittedly, all of the market studies examined here are - like most market studies - broad generalizations; nonetheless, they provide some idea of what the tourists want, and this can provide the foundation upon which tourism in Niagara can be promoted and developed.

CHAPTER ELEVEN

MARKET TRENDS

There are a number of emerging market trends that will almost certainly have an impact on tourism in Niagara. An understanding of the possible implications of these trends by local governments and tourist operators in Niagara is essential if the region is to fully exploit these changes.

During the 1980's the population of Niagara's primary tourist market area (the Great Lakes States and Southern Ontario - see Appendix Three for further explanation) is expected to increase by 500,000; however, during the 1990's the population of this area is expected to decline by 2 million (Regional Niagara Planning and Development Department, 1983b). Thus, if Niagara is to receive increased numbers of tourists it will have to attract a larger proportion of this market, or attract more repeat visitors. The other alternative is for Niagara to attract more tourists from other market areas.

Further trends, and their implications for Niagara, may be examined by segmenting Niagara's primary market by age. This segmentation is taken from Regional Niagara's Planning Department (RNPd) publication: Tourism in the Niagara Region, Report 2 (1983b).

Children (ages 0-14) now represent about 22 per cent of the population of the primary market area; however, their numbers are expected to decrease by 5 per cent during the 1980's. Fewer children could mean less emphasis on summer vacations and increased shoulder season travel. Less children could also mean that more people will be free to travel and to stay at hotels. On the other hand, attractions that cater to children such as Go-Kart tracks and wax museums could receive fewer visitors.

Fewer children could mean fewer visits to Niagara by other segments of the population because: "some (4 per cent) return visits to Niagara Falls are attributed to parents showing their children 'this wonder of the world'" (RNPD, 1983b: 42). On the whole, however, it appears as though the benefits to Niagara's tourist industry that could accrue from a small decrease in the number of children could outweigh the adverse affects.

The older teenagers (ages 15-19) segment which now represents about 10 per cent of the population of the primary market area is expected to decline by 27 per cent during the 1980's. Such a decline may not be very significant to Niagara's tourism industry because this market segment is unlikely to have much spending power. It is difficult to determine exactly what attractions would be adversely affected by this decline. A survey at the Crystal Beach amusement park, for example, found that 77 per cent of the park's clientele were over 25 (Senese, 1981). Thus, amusement parks - the main type of attraction associated with teenagers - may not be greatly affected by the decline in the number of teenagers. It can perhaps be concluded

that the decline in the number of older teenagers is unlikely to have much of an impact on Niagara's tourism industry.

A decline of only 1.5 per cent in the number of young adults (ages 20-34) during the 1980's is forecast. Thus, this group, which represents 25 per cent of the population of the market area, should provide a steady source of tourists during the 1980's; however, the size of this market will probably decline in the 1990's.

The mature adult segment (ages 35-49), which represents about 17 per cent of the market area's population, is expected to increase in size by 27 per cent during the 1980's. This is very fortunate for Niagara and other tourist destinations because this group is: "about 40 per cent more likely to travel in a year than the average resident" (RNPB, 1983b: 45). Thus, this group could constitute a significantly higher proportion of the tourists entering Niagara by the end of this decade than it does now.

About 15 per cent of the population in the market area belongs to the "Empty Nesters" group (ages 50-64) - so named because the children of many people in this group have left home. The size of this group is expected to decline by about 10 per cent during the 1980's; nonetheless, this group will remain a highly significant market for several reasons. Marketers, for example, have noted that: "these people are spending more of their money rather than saving it for their children" (RNPB, 1983b: 47). Since many of these Empty Nesters are not tied down to vacationing during school breaks they may be more likely to

travel during the shoulder season. Those in this group without children may also be more willing to stay in expensive hotels, and to eat at expensive restaurants, and so forth. This group should begin to increase in numbers by the 1990's.

The last market segment, by age, is the Seniors group (65 years of age and older). Approximately 11 per cent of the population of Niagara's primary market area consists of Seniors; during the 1980's this group is expected to grow by about 16 per cent. According to the Tourism in Niagara report:

Considering their numbers and income it is thought that this market represents one of the 'largest emerging pools of purchasing power to impact the U.S. economy' (RNPd, 1983b: 47).

A senior citizen's boom will also, in all likelihood, have a strong impact on Canada.

The increase in the number of elderly people will have a number of implications for the tourism industry in Niagara and elsewhere. Since many of the elderly travellers of the future will be living on fixed incomes, many will want to know how much their vacations cost in advance of their actual trip. There is a good chance that a large proportion of this market will choose prepaid fixed price package vacations. Thus, packaged bus tours of Niagara have a great deal of potential.

It must also be recognized that senior citizens prefer holidays that do not require a great deal of physical exertion (Goeldner/Duea, 1984). This suggests that tourist facilities should be planned with the elderly in mind. More campgrounds, for example, should provide fully serviced cottages or lodges;

this, would provide the elderly who wish to stay in a campground environment - but find living in a tent too uncomfortable - with a unique form of alternate accommodations.

It must also be noted that in Niagara Falls, for example, many of the hotels and motels that are within "walking distance" of the Falls may not be within comfortable walking distance for the elderly; thus, a frequent shuttle bus service to the Falls from nearby hotels may eventually have to be instituted as the elderly travel market grows. Shuttle systems may also be required in other tourist areas (i.e., Niagara-on-the-Lake), or within certain tourist attractions (i.e., the Marineland theme park).

One final point to make regarding the elderly is the fact that age does not necessarily alter one's leisure activities. Elderly subjects of one study, for example: "showed a strong tendency to maintain leisure participation patterns established well before reaching the age of fifty" (McAvoy, 1979: 46). These findings suggest that senior citizens are not a homogeneous group that may be specifically targetted for marketing; on the contrary, the seniors can be segmented into various travel markets in the same way the American and Canadian populations were in the previous chapter. The main factor that makes the seniors stand out from the rest of the population - from a tourism planning and development point of view - is the fact that facilities and attractions may have to be made more comfortable and accessible for them.

The growth of the seniors market may be augmented by an

increase in the number of people retiring early (Goldie, 1983). A major result of this trend would be a large increase in the number of "Empty Nesters" with lots of time and money to spend on travel.

Another emerging segment of the tourist market is the working woman (Canadian Government Office of Tourism, 1982). With more women working it stands to reason that more women will be making travel decisions for their families and themselves. Therefore, those responsible for promoting attractions in Niagara will have to ensure that their promotions are not subtly biased to any particular sex.

Changes in the structure of families should also have an impact on tourism. An increase in the number of families in which both the husband and wife work will, if it has not already, increase the popularity of short, well-planned vacations, because it will be difficult for these families to co-ordinate long vacations due to time restrictions (Naradick, 1979). Public and private tourist facilities in Niagara could capitalize on this trend by offering special weekend or four-day packages that include accommodations and the price of admission to several local attractions.

It should be noted that there will be a "mini baby boom" during the late 1980's and the 1990's as the Post World War Two Baby Boomers have children of their own (Goeldner/Duea, 1984). Thus, many families with children may delay taking vacations during this time, furthermore, attractions catering to children may enjoy a growing market by the 1990's.

Education levels may also influence tourism:

Studies uniformly show that the well-educated account for the most travel and the most dollars spent for vacations and pleasure travel (Goeldner/Duea, 1984: 7).

Thus, the increasing levels of education among the North American public could significantly boost the level of tourism activity.

It is very likely that the mode of transportation for many tourists will change in the coming decades. In fact, a study by the Canadian Government Office of Tourism suggests that a smaller proportion of tourists will travel by car and that: "packaged intermodal travel, i.e.: fly/drive and even bus/drive will gain popularity" (Canadian Government Office of Tourism, 1982: 50). An analysis of the trends of vacation travel by Canadians between 1966 and 1982 reveals that the use of cars for overnight trips has declined from 77 per cent in 1968 to 69 per cent in 1982 (Tourism Canada, 1983). This is not to say that the decline in car use has been steady - indeed, car use for vacation travel has fluctuated quite significantly - but the general trend seems to be a reduction in the proportion of vacation trips taken by car. Air travel, on the other hand, seems to be increasing in importance.

In 1968, 8 per cent of Canadians who took trips that lasted one night or longer flew by plane; while in 1982 16 per cent of such travellers took the plane (Tourism Canada, 1983). With increased deregulation of the airline industry in Canada, it is possible that a greater proportion of tourists will fly by plane, especially if smaller cars become the norm and the price

of travelling by car goes up.

Increased air travel by tourists would have several implications for Niagara. First of all, nearby cities with major airports (Hamilton, Toronto, and Buffalo) would become - or would substantially increase their positions as - important gateways to the Niagara Region. Thus, Niagara would have to be heavily promoted in these cities.

Access to Niagara by means other than the car from these gateways would also have to be considered if a greater number of tourists travel by plane. Improved train and bus services, and even hydrofoils and boats may be necessary to connect Niagara to the gateways.

Bus travel to Niagara could also increase. There has already been a substantial increase in the number of charter bus passes issued by the Niagara Parks Commission over the past decade (see Figure 9.1). Furthermore, various social and economic factors that have already been discussed may encourage even greater use of buses by tourists.

Visitors to Niagara without their own cars would obviously need to be transported within the region. Car rentals provide one mode of transportation for such visitors, however, other modes such as improved urban and regional transit, bus tours of the region, bicycle paths, and bicycle rentals within some of the cities will have to be considered.

The motivations for travelling are also changing. The travel market is becoming more segmented (Jackson, 1985: 33). People are more knowledgeable and have more specialized

interests these days. More and more tourists are seeking specialized vacations; some may be interested in marine history, while others may be interested in horticulture. The point is that the image of the tourist as a member of a homogeneous mass is giving way to the realization that tourists often belong to special interest groups. This means that Niagara can no longer rely on only a few points of interest to attract tourists; if it does, its tourism industry will either stagnate or decline.

To attract different tourist markets Niagara must capitalize on its diversity. It is probably impossible to identify all the tourist markets for promotional purposes; nonetheless, several broad themes in Niagara could be promoted and developed. These themes include: the landscape (Niagara Falls and the Niagara Gorge, the orchards and vineyards, the escarpment, and so forth), the Lakes (Lake Ontario and Lake Erie), agriculture and horticulture (the fruitlands, the Niagara Blossom Festival, the Welland Rose Festival, the St. Catharines Grape and Wine Festival, the various horticultural attractions along the Niagara Parkway, and more), the history of Niagara (the War of 1812, early settlements, museums, etc.), and the outdoor recreational activities of Niagara (swimming, bicycling, sailing, hiking, etc.).

Niagara's historical legacy and the region's outdoor recreational activities are not well known; however, it is important to Niagara's tourism industry that they be promoted.

In regards to history:

Nostalgia is a major market segment for tourism. In the face of ever increasing technology and the pace of modern

life, people are making a more conscious effort to recognize the past (Goeldner/Duea, 1984: 8).

Thus, the preservation and promotion of more of Niagara's heritage could improve the health of Niagara's tourism industry.

The promotion of the outdoor recreational activities that may be engaged in while in Niagara may also attract tourists to the region because:

The emphasis on physical fitness has increased the tourism potential of areas in which sports, physical fitness activities, or outdoor wilderness and recreational experiences can be enjoyed (Jackson, 1985: 33).

Visitors may be encouraged to visit Niagara to swim in Lake Erie, or to take a bicycle tour of the countryside, or to bicycle or hike on the trails along the old and new Welland Canals.

Clearly, there are a number of possibilities available to promote the many attractions in Niagara, in order to appeal to a variety of tourist market segments.

A factor that may become increasingly important to Niagara's tourism industry is the value vacationers feel they may get for their dollars in Niagara, and the perceived quality of Niagara's tourist facilities and attractions. According to one Tourism Canada study: "Travelers are becoming more discriminating, more demanding of quality, value, reliable information and safety" (Canadian Government Office of Tourism, 1982: 51). The implications of all this are quite obvious; the quality of the tourist services and facilities in Niagara must be improved, and prices must be fair.

The final point to make in this section on trends involves

competition. More and more communities and regions in Canada and the U.S. are looking upon tourism as a means of generating local economic activity, often because many of these areas are like Niagara - witnessing a breakdown of their traditional economies based on manufacturing. This trend suggests that Niagara will be facing a greater degree of competition for a share of the tourist market in the future. This problem will be exacerbated by a decline in the population of the Niagara's primary market area.

The marketing problems and opportunities facing Niagara and the other tourist destinations may be summed up by the following passage taken from Thomas Davidson's (1984) article: "Marketing travel in an emerging economy".

The byword for marketing travel in an emerging economy is competition, and competition has numerous corollary concerns: developing a strong unique competition edge; gaining market share from a clearly defined market segment; building continued customer loyalty; and engaging in aggressive - some might even say cut-throat - marketing (1984: 38).

In conclusion, Niagara has the potential to capture a significant share of the tourist market from other destinations; however, it must be recognized that many other destinations have the same potential.

CHAPTER TWELVE

RECOMMENDATIONS AND CONCLUSION

Once again, the main aims of tourism planning for Niagara should be to provide strategies to:

- increase the satisfaction tourists derive from visiting Niagara;
- + encourage tourists to visit more of the region;
- attract more visitors during the off-season;
- increase the length of stay of visitors;
- encourage the promotion, planning, and development of tourism on a regional basis and;
- maximize the economic benefits and minimize the environmental damage associated with tourism.

The recommendations presented in this chapter to achieve these objectives within the next five years will, where applicable, incorporate the means by which certain local problems can be ameliorated. Nonetheless, it must be recognized that tourism cannot, in most cases, provide a direct means of ameliorating problems like water pollution, agricultural land loss, and other environmental concerns; it can only provide the added incentive to deal with these problems. Employment, on the other hand, is something that would be directly influenced by tourism; therefore, tourism development is being proposed for each of the

main urban areas.

Most of the recommendations presented in this chapter could be implemented simultaneously because the responsibility for implementing these projects is spread among numerous groups. The priority of the individual projects will be listed in those rare cases that a single organization would be required to carry out several projects. All these projects should be completed within the next five years to achieve the goals established in this thesis within this time. Table 12.1 briefly identifies the responsibilities of the main government bodies that would be required to implement the recommendations. The successful implementation of these recommendations would also require the cooperation of the private sector. Numerous government agencies not listed on the table would also play a role - albeit minor compared to the listed agencies - in the carrying out of the recommendations.

The recommendations for individual municipalities will be discussed first. These individual strategies would contribute to the achievement of the aims identified at the beginning of this chapter.

Niagara Falls

Considerable improvements to the types of facilities, services, and events available to Niagara Falls' visitors are necessary to make the area a high quality tourist attraction.

An integrated transportation system serving all the major tourist areas of Niagara Falls, including the Niagara Parks,

Table 12.1

The Implementation of the Recommendations: A Summary of the Responsibilities of the Main Public Agencies

Agency/Organization	Recommendations
City of St. Catharines	<ul style="list-style-type: none"> - Designate Port Dalhousie a Heritage Conservation District. - Initiate the development of Port Dalhousie into a major tourist attraction - a detailed plan of this development is contained in the <u>Port Dalhousie Harbour Study</u> (Lanmer Consultants (1978) Ltd., 1984).
Department of Fisheries and Oceans/City of Port Colborne	<ul style="list-style-type: none"> - Initiate the development of a marina in Port Colborne.
Ministry of Citizenship and Culture	<ul style="list-style-type: none"> - Provide funding and assistance for the development of a canal side village in Thorold in collaboration with local agencies (i.e., the Ad Hoc Welland Canal Group).
Ministry of Environment	<ul style="list-style-type: none"> - Identify, and prosecute those who are illegally discharging pollutants into the old Welland Canal, the Welland River, and Niagara's other waterways. - This Ministry should also provide local governments with assistance to reduce the flow of raw sewage into Niagara's waterways.
Ministry of Natural Resources/Niagara Peninsula Conservation Authority	<ul style="list-style-type: none"> - Identify and purchase shore-front property for public use on Lake Erie.
Ministry of Tourism and Recreation	<ul style="list-style-type: none"> - Should focus less on promoting Niagara Falls and focus more on promoting the Niagara Region as a major tourist destination. - Develop a good quality Niagara Region brochure.
Niagara Parks Commission	<ul style="list-style-type: none"> - Enhance the entrance to the Niagara Parkway at Fort Erie.

Table 12.1 cont'd.

Niagara Peninsula
Conservation Authority

- Provide more recreational facilities at the Beamer Memorial (first priority) and Virgil Dams Conservation Areas.

Niagara Transit

- Implement a shuttle service between the Falls and the major tourist areas (with the help of the provincial government).

Parks Canada

- Develop a National Historic Park at the remains of the Third Welland Canal at the escarpment.

Public Works Canada

- Arrange for the provision of a basic infrastructure (roads, sewage, etc.) along the Welland Recreational Waterway.

Region Niagara Tourist
Council

- Should become more active.
- Co-ordinate the public and private sectors of the tourism industry and point out development opportunities to the private sector.
- Promote the region more vigorously.

should be developed. Such a system could consist of an extension of the present People Mover System of the Niagara Parks into the commercial tourist areas of the city. People Mover Stations - consisting of glass shelters that are larger than conventional bus shelters - could be developed at reasonable intervals along major tourist corridors.

Stations are preferable to frequent bus stops because a transit system stopping only at stations would operate faster than a conventional bus system. This proposed extension of the People Mover System would almost certainly encourage people staying in Niagara Falls to leave their cars at their hotels and motels while visiting the Falls, assuming, of course, that the service is frequent and well-publicised. The People Mover Stations should also be within easy walking distance of most of the hotels and motels among the major tourist corridors.

This entire system could be operated by Niagara Transit (the city of Niagara Falls' transit system) because it is subsidized by the Ontario government. The Niagara Parks Commission could not be expected to develop such an extensive system because it is not subsidized by the government. Furthermore, it is beyond the mandate of the Niagara Parks Commission to operate such a city-wide system. The buses operated by Niagara Transit for the People Mover system should be differentiated from local transit buses.

The successful implementation of this city-wide People Mover System could substantially reduce traffic congestion in the city by encouraging the use of public transit by tourists.

Another method of ameliorating the congestion problem in Niagara Falls is to encourage tourists to travel to the area by means other than the car. Visitors using Toronto as a gateway to Niagara Falls are the main market segment that could be influenced to travel to Niagara Falls by alternate modes of transportation. The train service between Toronto and Niagara Falls should, for example, be promoted. Bus tours of the Niagara Region originating in Toronto should also be encouraged. Eventually, even ~~boat trips~~ from Toronto to Queenston could be operated; buses could shuttle passengers between Queenston and Niagara Falls.

There seems to be a shortage of good quality night-time activities in Niagara Falls. Aside from viewing the Falls at night, many visitors in the city during the evening wander along Clifton Hill and visit attractions such as museums and haunted houses; others visit the Maple Leaf village amusement park and shopping complex. More interesting and "sophisticated" night-time entertainment (i.e., live theatre, musical acts, and concerts) would probably appeal to a large segment of the visitors staying in the city overnight; in fact, such entertainment would likely encourage more visitors to stay overnight. Improved night-time entertainment could also attract more upscale visitors - the ones who spend more money on their vacations - to the area.

The Festival of Lights (the three-month long festival beginning at the end of November that features the illumination of areas along the Falls with coloured lights) is a major step

towards increasing off-season visitation; however, it needs to be expanded. A variety of activities should be organized during the festival to attract more tourists, and to encourage them to stay for a few days. For several weeks during the festival an intensive effort could be made to increase the popularity of the event. Live entertainment shows at several of the hotels, cross country skiing races at the Whirlpool Golf Course, and special exhibitions at local convention facilities are among the many activities that could be organized for the festival.

The development of large indoor recreational facilities in Niagara Falls could also draw more visitors during the off-season. Hotels with such facilities could attract conventions and weekend travellers during the off-season. More indoor attractions at the Marineland themepark could certainly make this complex a major year-round tourist attraction.

Fort Erie

Fort Erie's position as a gateway to the Niagara Peninsula and Canada should be exploited for tourism. The Mather Arch in Fort Erie - which marks the beginning of Niagara Parkway - should be developed further. One possibility, according to the study conducted for the Niagara Parks Commission, is to develop a pool and fountain near the arch (Richard Strong Associates Ltd., 1969). The gardens that are now in the area could be retained, or preferably, enhanced. Developing and promoting the Mather Arch area as the gateway to the Niagara Parkway may encourage more visitors from the United States to drive to

Niagara. More importantly, the development of a large marina at Jordan Harbour would encourage additional development in the area that would threaten adjacent farmlands. Furthermore, the development of tourism in St. Catharines should take precedence over the development of tourism in Lincoln because St.

Catharines has a much larger population requiring alternative employment opportunities. Admittedly, residents of St.

Catharines could work in Lincoln; however, from an environmental point of view it makes more sense to concentrate tourism development in St. Catharines.

Heritage preservation can significantly increase the appeal of an area. Thus, it is recommended that downtown Port Dalhousie be designated a Heritage District under the Ontario Heritage Act. The advantage of such a district designation is that it

...allows the municipal Council to control not only the existing buildings but ensures that new buildings are compatible with their neighbours in regard to location, design, scale, and building materials (City of St. Catharines, 1979: 41).

Such control is essential if Port Dalhousie is to develop into a quality tourist destination. This designation does not suggest that a freeze should be put on development in the area, in fact, more development should be encouraged in Port Dalhousie because the numbers of businesses located in the area is still fairly low. New development should, however, be compatible with what already exists in the area.

Live theatre generates a high proportion of overnight stays relative to other attractions (Ontario Travel Survey, 1985).

step towards developing the entire Welland Canal Corridor into a tourist attraction.

A marina facility near the downtown core of Port Colborne on Lake Erie could dramatically improve the tourist industry in the city. Some demand definitely exists for pleasure-boat docking facilities in the area; however, a detailed market analysis would be required to determine whether a marina in the area would be economically viable. Such a facility could become a focal point for other tourist-related developments such as hotels, restaurants and shopping facilities. The development of such a marine would reduce the Port Colborne tourist industry's dependence on beach front activities; thus, such an attraction could contribute to the lengthening of the city's tourist season.

Further tourist-related development in West Lincoln and Wainfleet is unwarranted at the present time. Such development should be concentrated in the municipalities with larger populations and more tourism potential, both to provide employment opportunities where they are needed, and to encourage the development of strong tourist centers beyond Niagara Falls and Niagara-on-the-Lake.

Grimsby

There is great potential for increased tourism development in Grimsby due to its natural setting and its strategic position on the busy Q.E.W. highway.

A large marina facility at Grimsby could attract boaters

from nearby metropolitan areas like Toronto and Hamilton; in fact, downtown Toronto is only an hour's drive away from Grimsby. Hamilton is less than twenty minutes away by car.

Land along the waterfront is not at such a premium in Grimsby as it is in such places as Toronto; thus, the costs of developing the Grimsby waterfront would be less than for the large metropolitan areas nearby. This cost advantage could be passed on to users in the form of lower fees, thereby giving the area a competitive edge over facilities that are closer to the metropolitan markets. Grimsby's small town atmosphere and scenic beauty would also contribute to the success of a marina facility in the town.

The development of a large marina facility in Grimsby could form the nucleus for a number of other tourist facilities such as hotels, restaurants, and shops - thereby making Grimsby a major tourist center.

Other attractions in Grimsby could also be promoted and developed. The Beamer Memorial Conservation Area (one of the highest points on the Niagara Escarpment) could be developed into a more popular park by placing more picnic tables in the area and by making the existence known (using road signs and promoting it in travel literature).

In downtown Grimsby a farmer's market could be established. Visitors could be attracted to the market from the busy Q.E.W. by placing signs on the highway indicating the existence of a large market in the town. Grimsby specializes in the production of both fresh fruit and flowers; thus, its markets could offer a

variety of products. Judging by the popularity of two large fruitstands operated by the Ontario government along the Q.E.W., and the interest expressed by tourists in purchasing fresh fruits in Niagara; a market in Grimsby would probably attract a substantial number of people. Obviously, the success of such a market could substantially benefit many of the businesses located in the downtown area.

The market could be part of an overall strategy to cultivate a "garden" theme for Grimsby. This "garden" image would provide a focus for promoting the town as a tourist attraction. Grimsby could also be promoted as a "gateway" to the Niagara Region.

St. Catharines, Thorold and Lincoln

A National Historic Park should be developed at the remains of the Third Welland Canal at the escarpment. The historic Welland Canals are of national significance; thus, part of their remains should be protected in a manner that recognizes the historical significance of these Canals.

The Third Canal at the escarpment is unequivocally the best location for a National Park because the remains of the old Canal in the area are in good condition. Furthermore, the area is adjacent to the existing Canal's flight locks which, as alluded to earlier, are the most fascinating features of the Welland Canals. A park in this area would also command an excellent view of much of Niagara - including the Welland Canal below the escarpment. The Federal Government (through the St. Lawrence Seaway Authority) already owns the property that this

park would be located on.

A plan completed in 1964 suggested that a park encompassing the Third Canal at the escarpment could be developed with a capacity to accommodate 6,110 persons and 1,454 cars at one time (Project Planning Associates, 1964). Despite its age, the plan would still apply to the area today. The plan suggested, among other things, that a campground, an observation area at the flight locks, and a museum be developed at the park.

It is quite conceivable, judging by the attendance levels at other National Parks in Ontario, that designating the area adjacent to the flight locks a National Park, would attract many visitors to the area. Thus, such a park could significantly improve the health of the tourism industry in St. Catharines, Thorold, and other nearby municipalities. On a less pragmatic note, the development of this proposed park would provide the historic Welland Canals with the recognition that should be accorded to them. The park would also be an important educational resource.

The concept of developing an old Canalside Village along an abandoned section of the Canal in Thorold (see Chapter Seven) should also be considered. Such a development could increase the length of stay of visitors to the area, and increase the popularity of the Canals as a tourist destination.

In regards to facilities on Lake Ontario, a new marina should be developed at Port Dalhousie in St. Catharines rather than at Jordan Harbour in Lincoln. If both are developed there could be an oversupply of marina facilities in Northern

Niagara. More importantly, the development of a large marina at Jordan Harbour would encourage additional development in the area that would threaten adjacent farmlands. Furthermore, the development of tourism in St. Catharines should take precedence over the development of tourism in Lincoln because St. Catharines has a much larger population requiring alternative employment opportunities. Admittedly, residents of St. Catharines could work in Lincoln; however, from an environmental point of view it makes more sense to concentrate tourism development in St. Catharines.

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Live theatre generates a high proportion of overnight stays relative to other attractions (Ontario Travel Survey, 1985).

Thus, the live theatrical productions that are regularly held in St. Catharines should be promoted for tourism.

Eventually, St. Catharines should have a theatre for live performances or a museum in the downtown area to increase the number of activities available to tourists - and local residents - in the core. More small-scale specialized shopping complexes in the core would also make the downtown more attractive.

Improvements to downtown Thorold should also continue because the area has the potential to attract more tourists in the future, especially if the flight locks on the Welland Canal become a popular tourist attraction.

In regards to Lincoln, further tourism development in the municipality should be limited to providing accommodations for tourists in farms and guest houses. Further large-scale tourism development is inadvisable from an environmental point of view.

Welland and Pelham

The tourism potential of Welland is, under present conditions, very limited. It is recommended, however, that Public Works Canada (or some other agency/agencies) spend the money necessary to provide a portion of the parkland adjacent to the Welland Recreational Waterway with the infrastructure (i.e., roads, sewage systems, etc.) necessary to develop tourist facilities. If no tourist development results from such expenditures - tourism development would presumably be left to the private sector - then other uses could be found for the land. Residential subdivisions could, for example, be built in

the area, and still leave lots of land open for public recreational use. Selling some of the land along the Canal would allow the government to recover some of the costs of providing a basic infrastructure to the area. Since it is public policy to encourage more growth above the escarpment it seems justifiable to try to stimulate some growth in the Welland area.

Like Lincoln, further tourism development in Pelham should be limited to the provision of accommodations for tourists at farms and guest houses. The Short Hills area of Pelham (and Thorold) which is a Candidate Provincial Park should not be exploited for tourism because its forested hills and valleys are unique in Niagara. Encouraging tourists to visit this area could lead to the degradation of this last large "wilderness" environment of Niagara.

Niagara-on-the-Lake

There is a definite need to ameliorate peak season traffic congestion in Niagara-on-the-Lake. If these traffic conditions are allowed to worsen, visitor satisfaction with the area will almost certainly deteriorate.

One of the possible solutions to the town's congestion problem is the construction of a large parking garage on the outskirts of its downtown; a parking lot would take up too much space. Large signs at the entrances to the town would direct tourists to this garage. At the garage a tourist centre could be developed. The centre would have tourist information

counsellors, brochures, slide shows, and wall maps. Other facilities at the centre could include washrooms, a souvenir shop; a ticket outlet for the Shaw Festival, and a snack bar.

To transport tourists between the parking garage and the main attractions of the town, a shuttle bus system would have to be established. The shuttle buses would run from the parking complex down to mainstreet; from there they would proceed to the Festival Theatre, and finally to Fort George where they would turn around and retrace their route.

The success of the shuttle system depends on the banning of on-street parking along the town's main tourist thoroughfare. Parking behind downtown buildings would serve locals, and people working downtown.

Tour buses entering the town would be required to park in a parking lot adjacent to the parking garage.

This entire concept may seem extravagant, however, the problem of overcrowding in the town has reached unacceptable levels. Some control must now be exercised over the movement of tourists in this town for the sake of both the tourists and the residents of Niagara-on-the-Lake.

There is a shortage of accommodations in Niagara-on-the-Lake during the summer (The Standard, July 26, 1986). Thus, the development of new accommodation facilities in the town should be encouraged, otherwise the proportion of tourists staying in the town overnight will decline.

The development of new accommodation facilities in Niagara-on-the-Lake should take place in areas beyond the main tourist

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core of the town. Additional tourist facilities near the main street area would contribute to the further congestion of the core.

The Virgil Dam Conservation Area of Niagara-on-the-Lake should be developed into a recreational area for tourists and locals. Picnicking and swimming areas could be established along one section of the Conservation Area's reservoir. The flow of tourists into the area could provide local farmers - the Conservation Area is located in the midst of orchards and vineyards - with a market for their fresh fruit; in fact, a fruit stand and small interpretive centre could be incorporated into the Conservation Area. The interpretive centre could contain information about agriculture in the Niagara Fruit Belt.

Regional Strategies

In this section general guidelines for developing tourism in the Niagara Region will be discussed. These guidelines are not oriented specifically to individual municipalities; they are essentially regional in nature.

As noted at the beginning of this thesis, the entire Niagara Region should be promoted as a tourist destination, rather than just the individual communities within it. Encouraging tourists to visit more of the region would increase the length of stay of tourists (thereby increasing their expenditures in the region), extend the economic benefits of tourism to more of the region, and possibly reduce the congestion at the major tourist nodes during the peak season by spreading the tourists out.

Promoting the entire Niagara Region would increase the average length of stay of tourists because such a strategy would probably increase the number of areas in Niagara that tourists would visit. In order to promote the entire region, however, there needs to be an agency that can co-ordinate such promotion. The Regional Government's Regional Niagara Tourist Council is the only agency in Niagara dedicated solely to the promotion of the entire region's tourism industry. Unfortunately, this agency does not seem to have the resources necessary to effectively promote tourism, nor does it have the widespread backing of Niagara's tourism industry. Obviously, tourist operators in Niagara must be made aware of the benefits that could accrue from the development of tourism in areas beyond the existing nodes. Furthermore, the Regional Niagara Tourist Council must be developed into an effective promotional instrument for the region's tourist industry.

The Regional Niagara Tourist Council, because of its regional scope, should also be the agency responsible for planning the development of tourism on a regional scale. Such planning would have to be conducted in association with local planning departments, Chambers of Commerce, government agencies with control over resources of significance to the tourism industry, and other concerned parties.

A more active role in the Region's tourist industry by the Tourist Council will require representatives of each of Niagara's municipalities on this Council. The Council is currently made up of some private tourist operators and

representatives from a few public agencies concerned with tourism. Most of the municipalities do not have a representative on this Council. Admittedly, the size and structure of the Regional Niagara Tourist Council would have to be dramatically altered to accommodate its new role as a co-ordinator of tourism planning and development, but such a drastic change is essential to provide the means necessary for ensuring some degree of co-operation amongst the various bodies involved in the region's tourism industry. It is recommended that the strengthening of the Tourist Council's role be given top priority.

Much of Niagara's tourist industry would benefit from increased off-peak visitation. One study (Manning/Powers, 1984) relating to campgrounds suggests some methods that may be used at various tourist facilities to achieve this objective:

- a) manipulate pricing
- b) alter opening and closing dates (i.e., extend the season)
- c) locate parks closer to market areas
- d) provide package camping vacations (offer a week of camping at several parks)
- e) provide information on crowding (i.e., promotional material can indicate when places are too crowded) (1984: 30).

According to the same study, it is easiest to persuade tourists to visit during the following off-peak periods, in descending order:

- a) Summer weekdays
- b) Fall

- c) Spring
- d) Spring/Fall combined
- e) Winter (1984: 30)

Since most of Niagara's tourism industry is not dependent on such highly seasonal activities as swimming, there is a great deal of potential to increase tourism during the shoulder seasons.

Two activities that could contribute significantly to Niagara's tourism industry are: package bus tours, and touring by private car. These activities should be encouraged during the shoulder season when temperatures are more comfortable for driving and the landscape is more interesting (during the spring the trees blossom and during the fall the trees change colour). Many elderly people take bus tours; thus, work and school commitments are unlikely to impede the ability of this group to travel during the off-season.

Increased bus touring and driving for pleasure in Niagara would expose more of the region to the economic benefits of tourism. These touring groups or individuals are, for example, more likely to eat lunch in areas beyond the existing tourist nodes than tourists interested in visiting only a few specific attractions in Niagara.

Touring may also reduce congestion because, by its very nature, it consists of spreading people over the landscape. Admittedly, though, popular points of interest on touring routes may be congested.

Increased touring of Niagara's fruitlands, and an increase

in the number of tourists visiting local wineries would increase the economic value of the fruitlands to the region.

Farmers may benefit from increased touring of the countryside through the sale of more fruit at roadside fruit stands. More enterprising farmers could provide accommodations for those touring the countryside; in fact, "farm vacations" and private homes and small hotels offering "bed and breakfast" in Niagara's Fruit Belt could evolve into an important tourist attraction of the region.

There are numerous scenic drives in Niagara that could be promoted. These include: scenic routes along the Niagara Escarpment, drives through Niagara's fruitlands, drives along waterways and waterbodies (Lake Ontario, the Niagara River, and the Welland Canal), and others. These scenic routes should be well marked with signs and heavily promoted in tourist literature.

There are many sites beyond the main tourist nodes of Niagara that would make interesting stops for bus tours of the region. Port Colborne, Wainfleet, Welland, and West Lincoln are the only municipalities that do not have enough interesting features to justify visits by bus tours.

There is the potential to develop high quality four-day package bus tours of Niagara that start in Toronto. The sample itinerary of such a tour (Appendix Four) indicates that there are enough attractions in Niagara to make such trips viable. The Region Niagara Tourist Council should take an active role in attracting tour operators to the region.

Bicycle tours of Niagara also have great potential: There are many backroads through the vineyards and orchards of Niagara that are highly amenable to cycling. Furthermore, the bicycle trail stretching along sections of the old and new Welland Canals offers unique cycling opportunities that could attract cyclists from outside the region.

As mentioned earlier in this thesis, the Welland Canals should be the next major frontier of tourism development in Niagara. This does not suggest, however, that the proposals for parkways along the Canal should be given priority. It is probably more sensible to first develop clusters of tourist facilities at certain points along the canal; if these become significant tourist nodes, a parkway along the Canal could be developed to link them up. Port Colborne, particularly downtown Port Colborne, would have to become an attractive tourist destination to provide the parkway with a strong southern anchor. To develop the northern part of the Canal into a major attraction it is recommended that the National Park at the flight locks which was proposed earlier in this Chapter be developed first. Such an attraction would likely stimulate more interest in other parts of the Canal, thereby creating a market for the other tourist-related developments along the Canal which were recommended in the first part of this Chapter.

To attract visitors from a variety of tourist market segments, a number of themes relating to the region should be developed and promoted by the Region Niagara Tourist Council. Historical themes relating to: the War of 1812, early settlement

in Niagara, and the Welland Canals, could, for example, be promoted. Niagara's outdoor recreational activities (boating, fishing, swimming, bicycling, etc.), the natural beauty of the region, and all the other attractions of Niagara that have been discussed elsewhere in this paper should also be advertised by the Council. Table 12. 2 lists the broad themes that could be developed for Niagara and the markets these themes would be expected to attract.

Special emphasis should be given to the promotion of Niagara's unique agricultural and horticultural features. Flower beds should, for example, be planted at interchanges along the Q.E.W. through Niagara to distinguish Niagara from other regions. Furthermore, the agricultural and horticultural festivals in the region should be heavily promoted. Such heavy emphasis on Niagara's agricultural and horticultural attractions is essential if Niagara is to be thought of as a distinctive travel region.

Further tourism development in Niagara should follow two important guidelines if the economic benefits of tourism are to be optimized and the environmental damage is to be minimized. First of all, large-scale tourism development should be concentrated in urban centres to minimize environmental damage and to provide employment opportunities where people live; it is also more economical for services to be concentrated at a few nodes than to be dispersed over the landscape (Gunn, 1979). The second point is that small-scale locally-owned tourist operations should be encouraged. The local ownership of tourist

Table 12.2

Tourism Themes for Niagara

Themes	Target Markets
Countryside Touring	
a) Bus Tours	- Empty Nesters (ages 50-64)/Seniors
b) Automobile	- Empty Nesters (ages 50-64)/Seniors
	- Families with children
Live Theatre	- The affluent
	- Females 25-54 years of age
Outdoor Recreational Activities (bicycling, hiking, fishing)	- Single men
	- The U.S. and Canadian outdoors markets*
Camping	- Families with children
	- The U.S. and Canadian outdoors markets*)
Shopping (antiques, flea markets)	- young singles
	- shopping is particularly popular with Ontario residents
Ethnic Festivals	- Females 25-54 years of age
	- The U.S. "Touring Market"*
	- Those interested in heritage and city culture*
Museums/Historic Sites	- The affluent
	- People visiting friends and relatives
	Females 25-54 years of age
	- Those interested in "Heritage" and "city culture"
High Quality Country Inns	- The affluent
	- "Empty Nesters": People aged 50-64
	- The U.S. Touring Market

*Refers to market segmentations in Chapter Ten: The Canadian Travel Attitude Motivation Study (CTAMS) and the American Pleasure Market Survey.

Themes

Target Markets

Horticulture/Agriculture

- The U.S. and Canadian outdoors market
- The Heritage and city culture groups
- The U.S. Touring market
- Should appeal to an extremely broad range of markets

Scenic and Historic

- Females 25-54 years of age
- The U.S. Touring market
- The Heritage and city culture groups

This table is based on information presented in Chapters Ten and Eleven.

operations would reduce the economic leakages of the tourism industry to areas beyond the region.

In conclusion, Niagara has a great deal of unrealized tourism potential. It is now necessary to create an alluring image for the region to make the Niagara Peninsula - and not just Niagara Falls and Niagara-on-the-Lake - a popular tourist destination. The fact that the Niagara Region is a unique geographical area with miles of shorefront, vineyards, orchards, and picturesque communities, should be exploited by cultivating an image of the region as a unique vacationland nestled between the shores of Lake Ontario and Lake Erie. Such efforts would benefit both Niagara's tourism industry and the region as a whole.

Conclusion

As mentioned at the beginning of this thesis, tourism is not as amenable to planning as many other economic activities are; mainly because there are so many government bodies and private operators involved with this industry. There is, nonetheless, a need for some government involvement in this industry to ensure that activities by tourist operators do not damage the long term viability of the industry. Government involvement is also necessary to extract as many benefits as possible from the tourism industry for the region. Such involvement cannot, however, take place in the absence of information on the existing situation of the tourism industry, the objectives that need to be set for the industry and, finally, the means by which these objectives can be realized. It is hoped that this thesis provides this information.

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APPENDICES

Municipality	Number of Hotels/Total Rooms	Number of Campsites
FORT ERIE	342	729
GRIMSBY	41	0
LINCOLN	177	638
NIAGARA FALLS	7200	2176
N-O-T-L	397	43
PELHAM	26	600
PORT COLBORNE	77	5380
ST. CATHARINES	753	0
THOROLD	224	0
WAINFLEET	39	456
WELLAND	89	0
WEST LINCOLN	0	100

Ministry of Tourism and Recreation, 1986, and
field work by the author

Municipality	Number of picnic ta- bles	Beach Length (Metres)
FORT ERIE	1027	712
GRIMSBY	101	830
LINCOLN	387	-
NIAGARA FALLS	970	152
N-O-T-L	529	167
PELHAM	293	242
PORT COLBORNE	1168	7314
ST. CATHARINES	682	3249
THOROLD	68	-
WAINFLEET	1110	2095
WELLAND	261	-
WEST LINCOLN	40	-

Ontario Recreational Supply Inventory, Ministry of
Natural Resources, 1976/77

NOTE: The list of beach lengths includes beaches,
that have been closed during the past few
summers due to pollution.

Although this list is dated it still provides
a general idea of the distribution of these
two recreational opportunities in the region.

REFERENCE MAP

NIAGARA: Distribution of Beaches

A.1

1 OF NIAGARA'S BEACHES

30 -< 50
20 -< 30
10 -< 20
2.5 -< 10.
0 -< 2.5

SOURCE: MINISTRY OF NATURAL RESOURCES, 1976/77

CARLETON UNIVERSITY
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1000

NIAGARA: Distribution of Picnicking Facilities

A.1

1 OF NIAGARA'S FACILITIES

15 -< 20
10 -< 15
5 -< 10
2.5 -< 5
0 -< 2.5

SOURCE: MINISTRY OF NATURAL RESOURCES, 1976/77.

CARLETON UNIVERSITY
DEPARTMENT OF GEOGRAPHY
1986

NIAGARA: Distribution of Hotel/Motel Rooms

% OF NIAGARA'S ROOMS

SOURCE: MINISTRY OF TOURISM
AND RECREATION
S. HAZRA

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1986

NIAGARA: Distribution of Campsites

A.1

SOURCE: MINISTRY OF TOURISM
AND RECREATION
S. HAZRA

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The Economic Impact of Tourism in Festival Country

Tourism Expenditures in Festival Country - 1982

Item	(Millions \$)	
	Direct Expenditures	Income Generated
Transportation	378.0	492.0
Retail Trade	229.6	334.0
Amusement and recreation	156.4	192.0
Accommodations and food/beverage	<u>411.8</u>	<u>512.0</u>
Total	1,175.8	1,530.0

Direct Employment (person years) attributed to tourism in Festival Country - 1982

Transportation	5,068
Retail trade	10,699
Amusement and recreation	3,330
Accommodation and food	<u>18,607</u>
Total	37,705

Direct, indirect and induced employment generated by tourism expenditure in Festival Country: 70 thousand person years.

Ontario Ministry of Tourism and Recreation, Ontario Tourism Statistical Handbook, 1983.

Estimated impacts of tourism in Niagara Falls, 1983

Total Visitation	15.8 million
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Total Expenditure	\$300 million
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Expenditure per visitor: \$19.00

Employment

Direct	9,100
Indirect and induced	<u>8,000</u>
Total	17,000

Income

Wages and salaries	\$227 million
Other income	\$166 million
Total	\$393 million

Pannell Kerr Forster, Tourism Impact Study - Proposed OWMC Hazardous Waste treatment facilities, 1985, p. 17.

19 per cent of the work force in Niagara Falls is engaged in the tourism industry (Niagara Falls Economic Development Agency, 1985).

Primary Market Area for Niagara

(Great Lakes States and Southern Ontario)

* Great Lakes States include New York, Pennsylvania, New Jersey, Ohio, Michigan, Illinois, Indiana and Wisconsin.

Sample Itinerary: Three day package tour of Niagara

DAY ONE

9:00 am	Depart from Toronto.
10:30 to 11:30	Tivoli Miniature World theme park (just outside St. Catharines).
11:30 to 1:30	Downtown St. Catharines for lunch, browsing, shopping, etc.
1:30 to 4:00	Countryside touring - highlights: <ul style="list-style-type: none"> - a drive through orchards and vineyards and a stop at a local winery. - Mountain Mills Museum and Decew Falls. - the Comfort Maple - Canada's oldest maple tree. - a drive through the scenic Short Hills area. - Ball's Falls Conservation area (historic buildings and waterfall). - the Happy Rolfe Bird Sanctuary in St. Catharines.
4:00 to 5:30	Visiting the sites of interest along the old and new Welland Canals.
5:30	Dinner at historic Port Dalhousie.
7:00	Check into hotel in St. Catharines.
8:00	Evening theatre or concert in St. Catharines.

DAY TWO

- 9:30 am to 12:00 Marineland themepark, Niagara Falls.
- 12:00 to 3:00 Drive down the Niagara Parkway to Fort Erie.
- lunch in Fort Erie.
 - tour of the historic fort that the town is named after.
- 3:00 to 6:30 Sampling the attractions of Niagara Falls.
- Niagara Parks greenhouse.
 - Maid of the Mist boat ride.
 - view from the top of one of the observation towers
- Evening free in Niagara Falls.

DAY THREE

- Free time in the morning
- 10:20 am to 2:00 Up the Niagara Parkway to Niagara-on-the-Lake - Highlights:
- Sir Adam Beck generating station.
 - School of Horticulture.
 - Aerocar rider over Whirlpool Rapids (optional)
 - Floral Clock
 - Laura Secord's home
- Rest of afternoon free in Niagara-on-the-Lake
- 7:00 Shaw Festival play.

Next Morning

Depart for Toronto

END

21.06.88

FIN