



Niagara-on-the-Lake

Economic Impact Analysis

Presentation to Council
February 28, 2022

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Agenda

- Introduction
- Tom McCormack
 - Phase I – Quantitative Analysis
Population, Dwelling, & Employment Trends
- Lauren Millier
 - Next Steps:
Phase II – Qualitative Analysis
- Next Steps
- Questions



Introduction

Monday, Feb 28, 2022





Tom McCormack
metro economics

Phase I: Quantitative Analysis

Niagara-on-the-Lake

Population, Dwelling & Employment Trends

2001 to 2051



NOTL Population, Dwelling and Employment 2001 to 2021



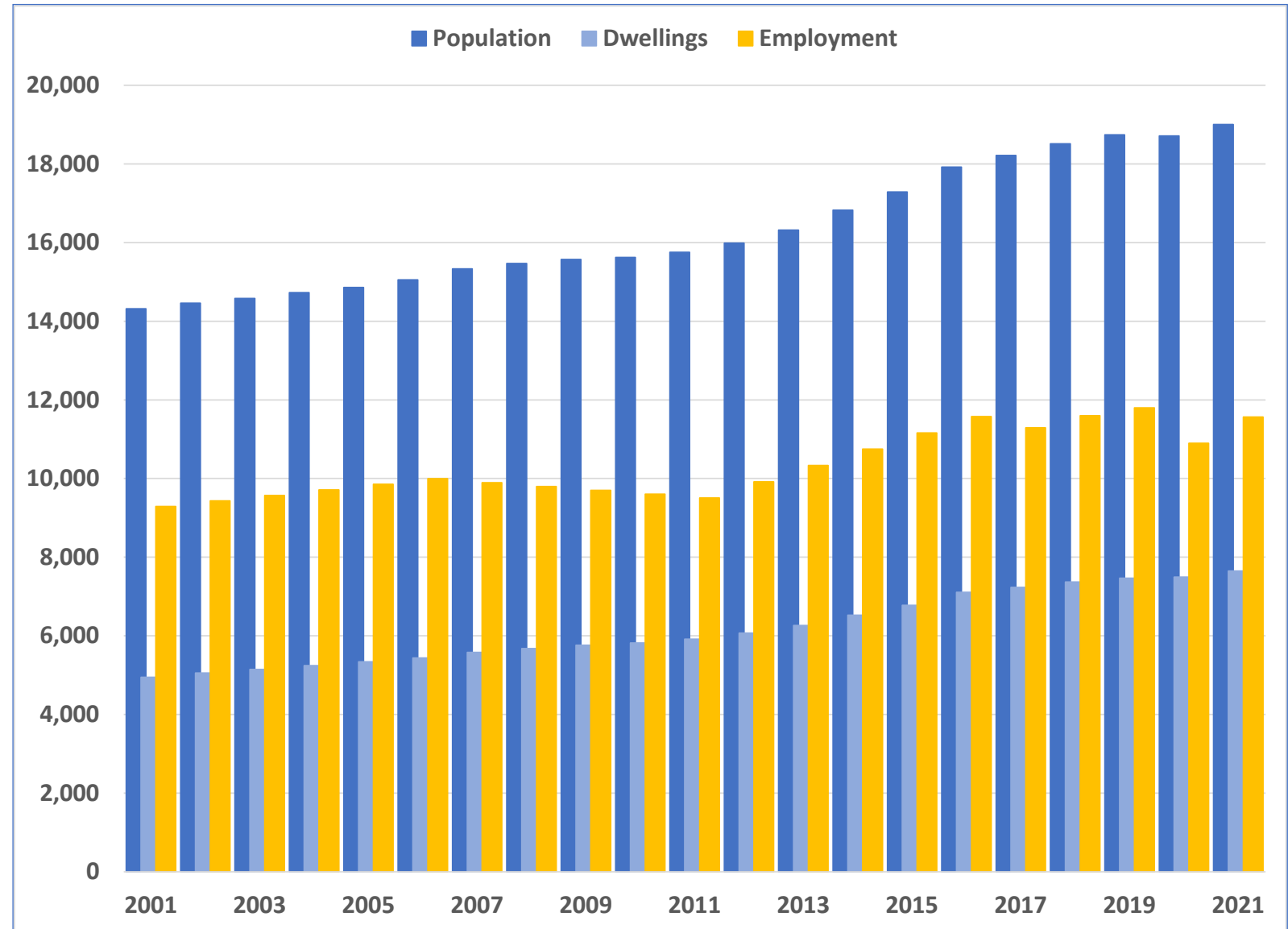
NOTL Annual Growth Rates 2001 to 2021

Population 1.4%

Dwellings 2.2%

Employment* 1.1%

* Employed by place of work



Source: Statistics Canada and metroeconomics



NOTL and Ontario Populations in 2021 Age and Gender % Share of the Total

NOTL

52.3 % are 55+

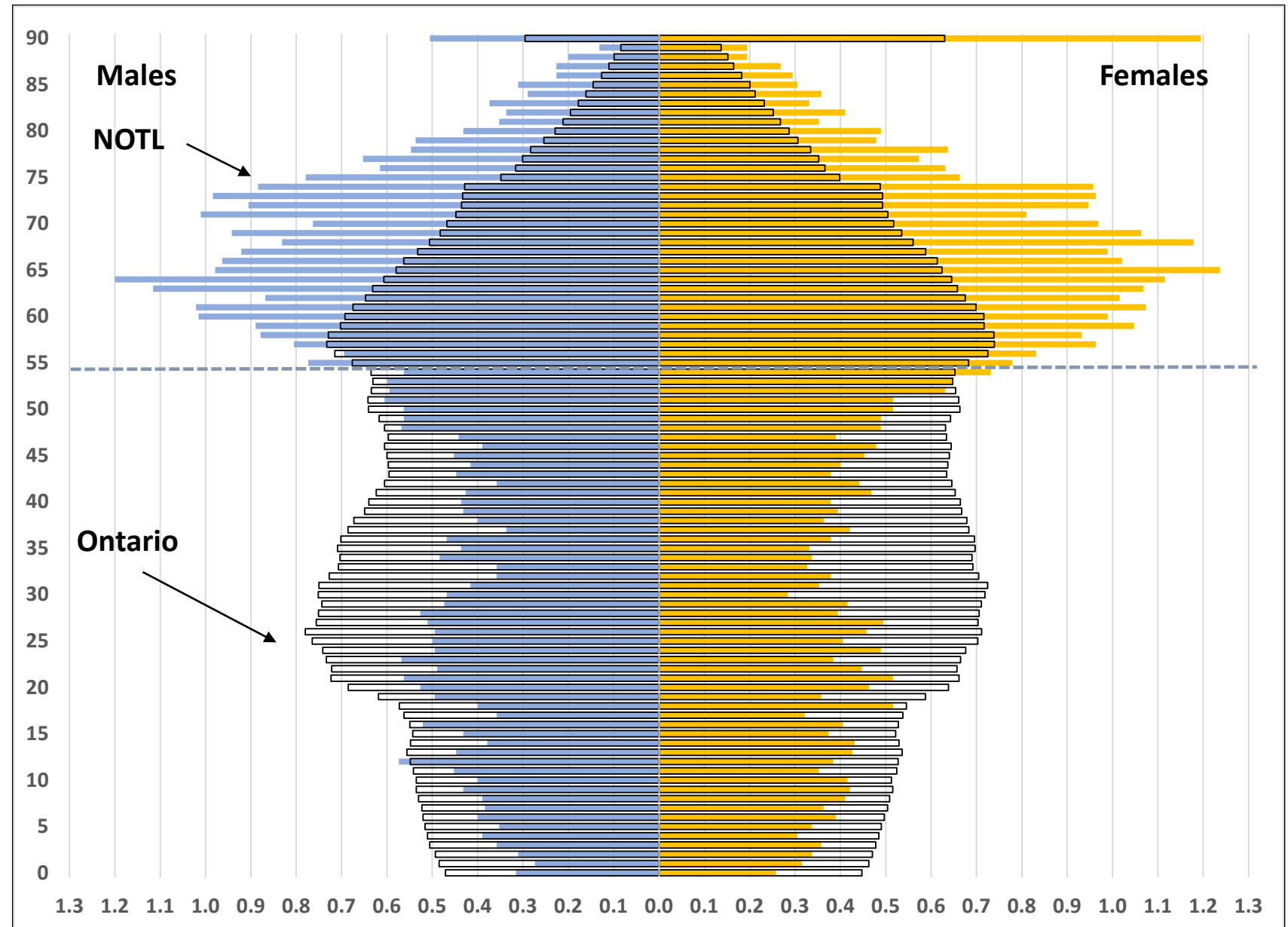
47.7 % are <55

Ontario

31.9 % are 55+

68.1 % are <55

Source: Statistics Canada
Post-Censal Population Estimates



Population, Dwelling & Employment Trends

Working Residents of NOTL in 2016



Total population 17,500

Total working residents 8,000

- **1,335 worked at home (17%)**
- **2,370 worked at a job location in NOTL (30%)**
- **860 had no fixed workplace address (11%)**
- **3,435 commuted (43%)**
- **54% worked part time**
- **23% were self-employed**

Population, Dwelling & Employment Trends

Jobs Provided by Employers in NOTL in 2016

Total jobs provided 11,575

Economic Base jobs totaled 5,716 (49% of all jobs)

- Tourism 3,351 (59% of EB jobs)
(accommodation-food 28%, retail 22%, arts-entertainment-recreation 8%)
 - Agriculture 980 (17%)
 - Manufacturing (14%)
 - Logistics (7%)
 - Other (3%)
- } Half driven by wine (wine and tourism are linked)

NOTL's EB share at 49% is exceptionally high (typically 15% to 25%)

The remaining 51% are Community Base jobs

Population, Dwelling & Employment Trends

NOTL's Demographic & Economic Disconnect

NOTL working residents total 8,000

NOTL jobs provided total 11,575

NOTL's implied net daily inflow totals 3,575

The gross flows tell the real story:

- **3,435 employed residents commute out each day**
- **7,910 workers commute to NOTL each day**
- **So, the gross bidirectional flows exceed 11,300 each day**

Population, Dwelling & Employment Trends

Base Case Projection for NOTL (Business as Usual)

Population growth 2021 to 2051 will average 1.4 percent per year

EB job growth 2021 to 2051 will average 1.0 percent per year

CB job growth 2021 to 2051 will average 1.5 percent per year

Total jobs (EB+CB) will grow 1.4 percent per year

Population will grow from 19,000 to 29,000 (+10,000)

Dwellings will grow from 7,600 to 12,600 (+5,000)

Jobs will grow from 11,600 to 17,200 (+5,600)

Population, Dwelling & Employment Trends

Niagara-on-the-Lake's Future

NOTL's population and job growth can and will occur independently

Alternative futures could be decided reflecting:

- **less population growth and more job growth, or**
- **more job growth and less population growth**

Where should the growth be accommodated?



Lauren Millier, BES, MCIP, RPP
MDB Insight Inc.

Next Steps: Phase II – Qualitative Analysis

Phase II – Qualitative Analysis



Mapping

- Using the work completed by metroeconomies, MDB Insight will identify and ‘map’ relevant business clusters by type of industry
- The mapping will allow us to assess the implications for the growth based on employment projections and determine what challenges the municipality may face in accommodating that growth on the ground
- Consideration will be given to the underlying land use framework and the constraints to expanding the existing footprint, the impact on the downtown, the continued evolution and needs of the agricultural and wine community, and the role of other settlement areas based on existing clusters of activity

Phase II – Qualitative Analysis



Tourism

- Given the importance of tourism to the growth and sustainability of the local economy, point of sale data will be used to characterize the existing tourism economy
 - Origin City, Spending Analysis, Length of Stay, Average Spend
 - A Comparison of Local vs. Visitor Spending
- Information can be used to inform the forthcoming tourism master plan
- Illustrates where the possible pinch points exist in the town's tourism infrastructure and product development
- Contributes to a discussion of the opportunities for growth and an appreciation of the land-use implications that may result

Phase II – Qualitative Analysis



Planning Tools

- The last step involves a review of relevant planning tools that could be used to assist the municipality achieve balanced growth
- This may include the use of CIPs/TIFFs, Historic Conservation Districts, Cultural Districts, Official Plan Policies, Flexible or Restrictive Zoning
- Case studies will be identified to illustrate how select communities have used these tools to achieve balanced growth, protect and retain historic character particularly in their downtowns.

Next Steps

- **EIA Qualitative Analysis**
- **Tourism Strategy RFP Process**
- **Tourism Strategy Development**
 - Engagement
 - Strategy
 - Action Plan





**Thank you.
Any Questions?**