

The State of Culture in St. Catharines

Revised Report



Table of Contents

1. Executive Summary
2. SCCIP Impact
3. Cultural Participation Analysis
4. Performing Arts Centre Analysis
5. Cultural Mapping & Demographic Analysis
6. Artists Survey
7. Community Perceptions
8. Top-Line Priorities
9. Next Steps
- Appendix 1. Source Charts for SCCIP Impact
- Appendix 2. Stakeholders Interview List

1. Executive Summary

1. Executive Summary

Review of Cultural Planning Process to Date

Phase 1: Internal Review – in Progress

A review of the cultural assets and services provided by the City of St. Catharines.

Phase 2: Community Consultation and Scan

Involvement of St. Catharines' community – its citizens, artists, cultural organizations, civic leaders, and broad-based stakeholders – through a variety of methods.

Phase 3: Comparative Analysis – To Come

Development of long-term goals, objectives and strategies for achieving both in a Culture Plan.

1. Executive Summary

Purpose of a State of Culture Report

- (1) To review existing assets, needs, opportunities, and resources of St. Catharines
- (2) To identify strengths, successes and opportunities
- (3) To align the Culture Plan with results of research, analysis and public consultation

1. Executive Summary

Next Steps

Complete Internal Review and Analysis

Undertake Comparative Analysis

Identify vision for next ten years and prioritize strategic directions.

2. Value and Impact of St. Catharines Cultural Investment Program (SCCIP)

2. SCCIP Value Review & Economic Impact Analysis

Objective

- To understand the value that SCCIP provides to St. Catharines' cultural sector
- To begin to project the economic impact of SCCIP

Methodology

- Review of internal draft analysis of 2004-2006 data
- Review of 2004-2011 SCCIP granting history
- Analysis of financial data from 2008-2010 of grant recipients
- Basic estimates of economic impacts of grant recipients
- *Note: Data and resulting conclusions are representative, not comprehensive*

2. SCCIP Value Review

Key Conclusions

Between 2004 and 2011, SCCIP provided 139 grants totaling more than \$1.1M.

The majority of grants are allocated to the performing arts, while the fewest have gone to the literary arts in terms of both total number of grants and total dollars.

SCCIP Allocation by Discipline

	2004-2011	
Heritage	\$19,625	2%
Special Events	\$43,000	4%
Arts Services Organizations	\$149,367	13%
Visual and Media Arts	\$197,993	18%
Performing Arts	\$679,255	61%
Literary Arts	\$7,500	1%
Ethnocultural Groups and Activities	\$18,700	2%

Total \$1,115,440

Total Number of Grants by Discipline

	2004-2011	
Heritage	4	3%
Special Events	8	6%
Arts Services Organizations	7	5%
Visual and Media Arts	17	12%
Performing Arts	95	68%
Literary Arts	2	1%
Ethnocultural Groups and Activities	6	4%

139

2. SCCIP Value Review

Key Conclusions

SCCIP recipients provide inconsistent data from year to year, but a review of data from 2004 to 2006 suggests:

- The level of permanent staff at SCCIP recipient organizations grew but still consists of a small core that is supplemented by paid contract staff and volunteers when necessary
- SCCIP is drawing most applications from arts groups, few or none from heritage and culture groups
- There is more potential to study, expand and market cultural tourism opportunities
- More can be done to collect and analyze consistent and useful data

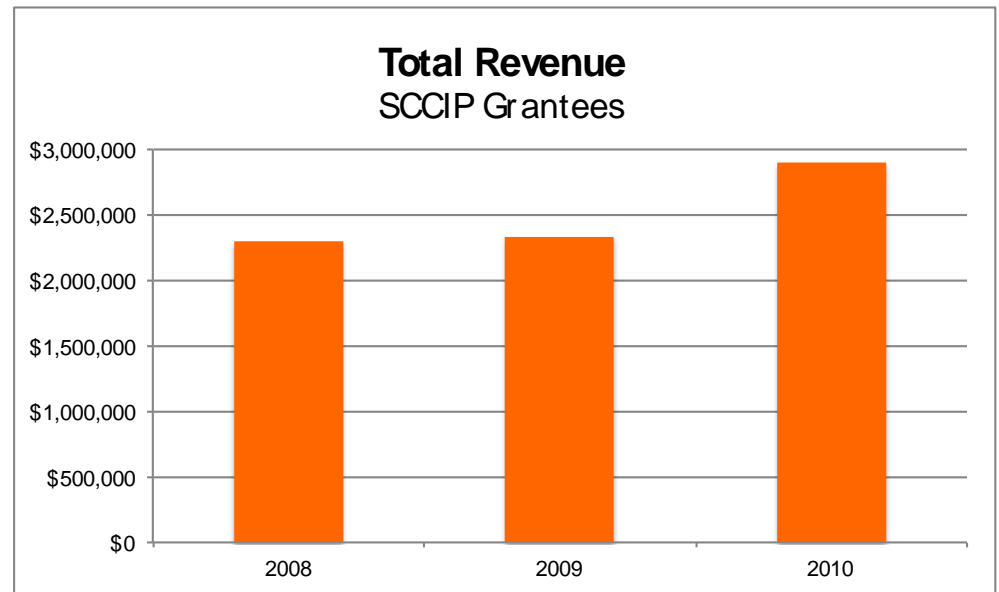
The following slides summarize data from entities that received SCCIP funding between 2008 and 2010. This data is more comprehensive.

2. SCCIP Value Review

Key Conclusions

SCCIP grant recipients are garnering (and thus spending) **more revenue** than three years ago.

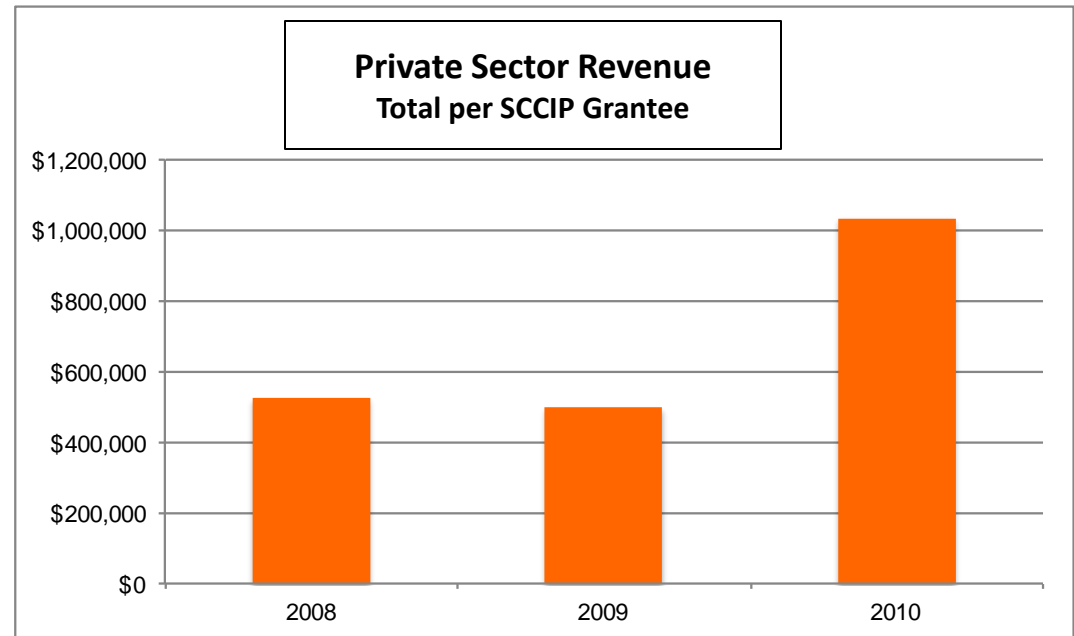
Overall revenue growth amounts to approximately \$600,000 over 3 years.



2. SCCIP Value Review

Key Conclusions

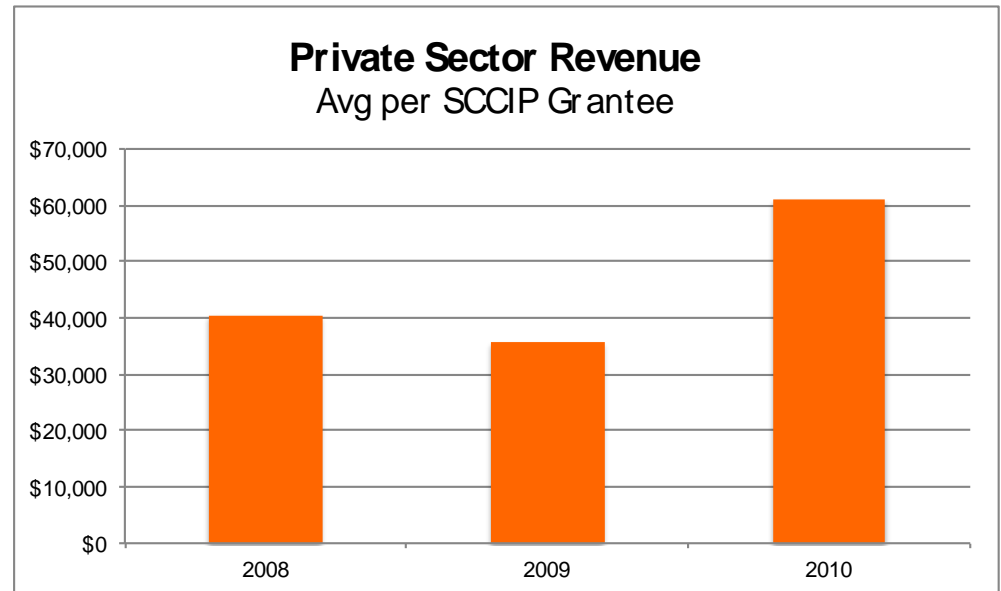
Funding from the private sector **nearly doubled** over 3 years, increasing from 23% of all revenue to 36% of total revenue.



2. SCCIP Value Review

Key Conclusions

The average SCCIP grant recipient is now raising **more money from the private sector** than three years ago.

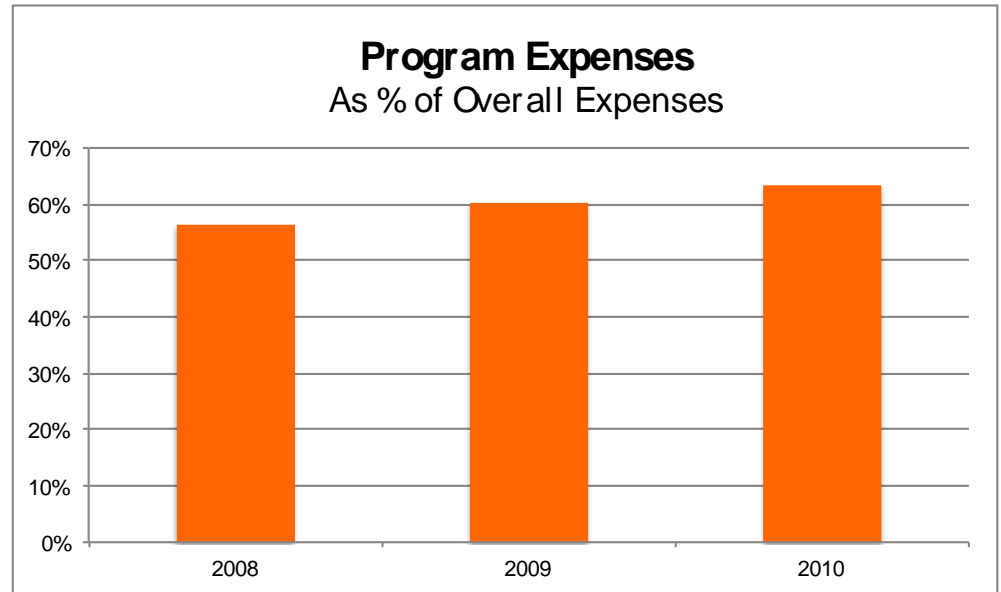


2. SCCIP Value Review

Key Conclusions

The average SCCIP grant recipient is now allocating more expenses to programming, **contributing to an increase in activity and artist employment.**

(4% increase in program expenditures overall.)

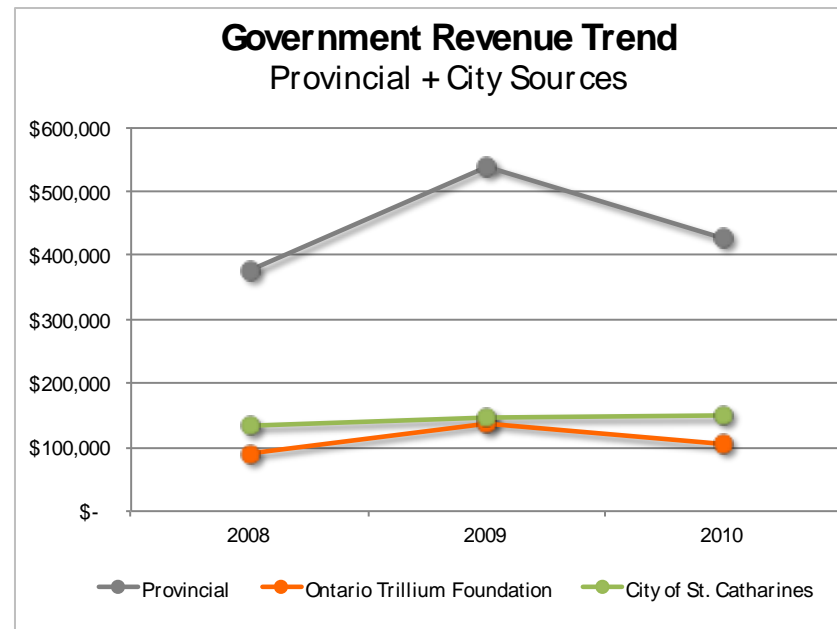
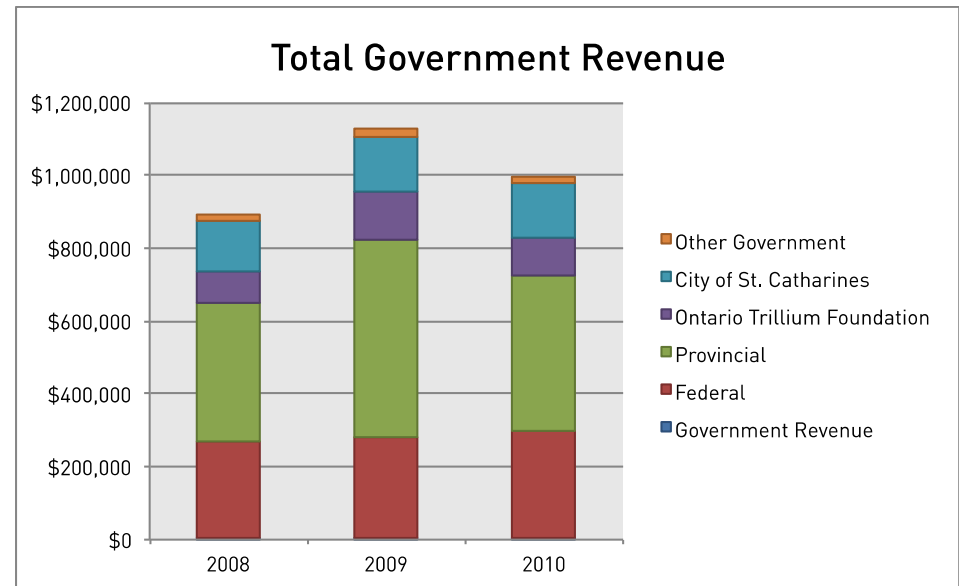


2. SCCIP Value Review

Key Conclusions

SCCIP has been a **consistent annual source** of government revenue, particularly as compared to Provincial sources.

This may suggest that SCCIP investment of **\$150K annually helps to leverage between \$700K and \$950K** in other government investment.

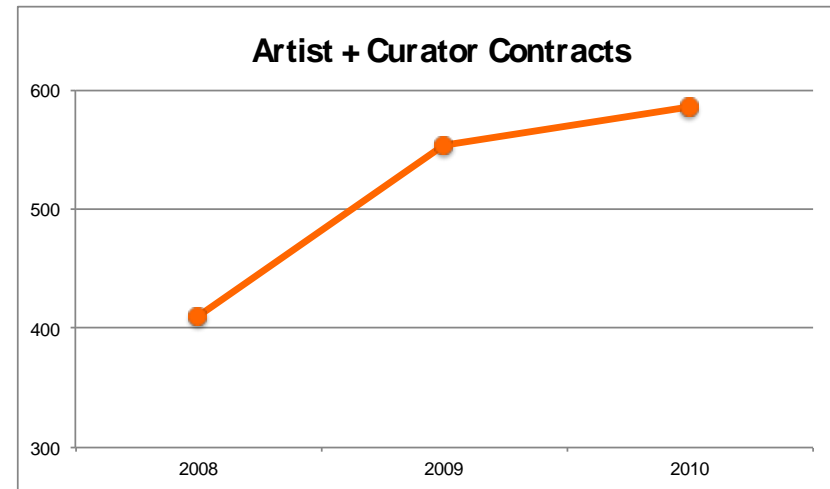
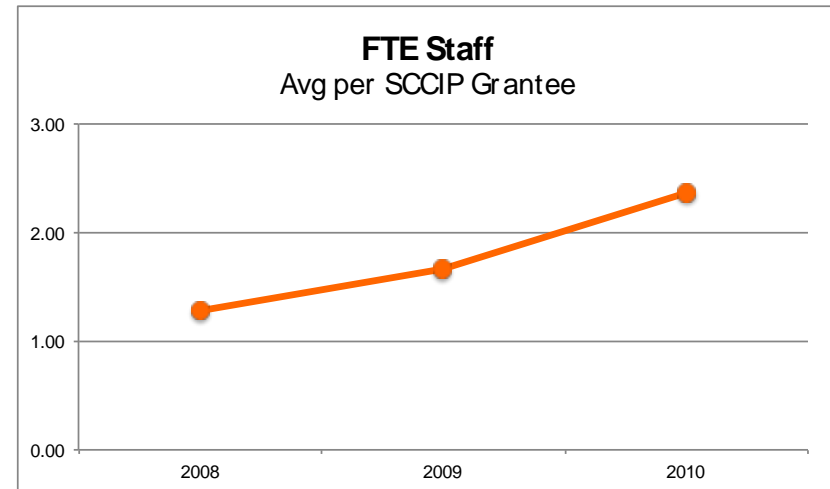


2. SCCIP Value Review

Key Conclusions

Most importantly SCCIP is helping arts organizations create jobs.

- In 2010, the average SCCIP grant recipient supported double the FTE jobs than in 2008.
- Between 2008 and 2010, the number of artists and curators employed by SCCIP grantees increased by at least 30 percent.
- Between 2008 and 2010, the number of artist contracts increased by 50%, amounting to nearly 600 total artist contracts.



Data may include more than one contract per artist or curator. As a reminder, data only include contract figures for a selection of SCCIP grantees. Actual figures are likely higher.

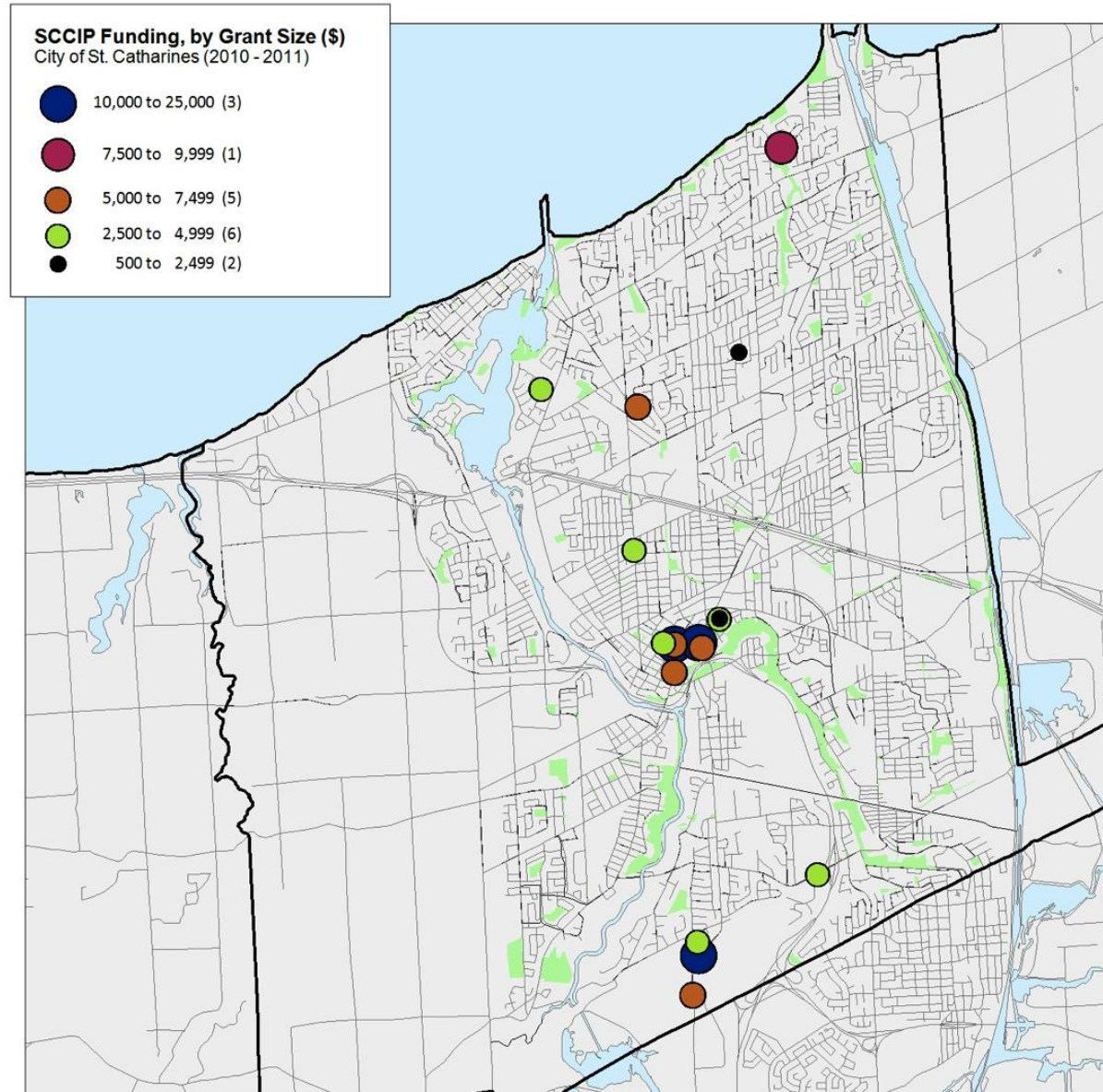
2. SCCIP Value Review

Key Conclusions

SCCIP funding **focus** is **downtown** but also well distributed throughout the City.

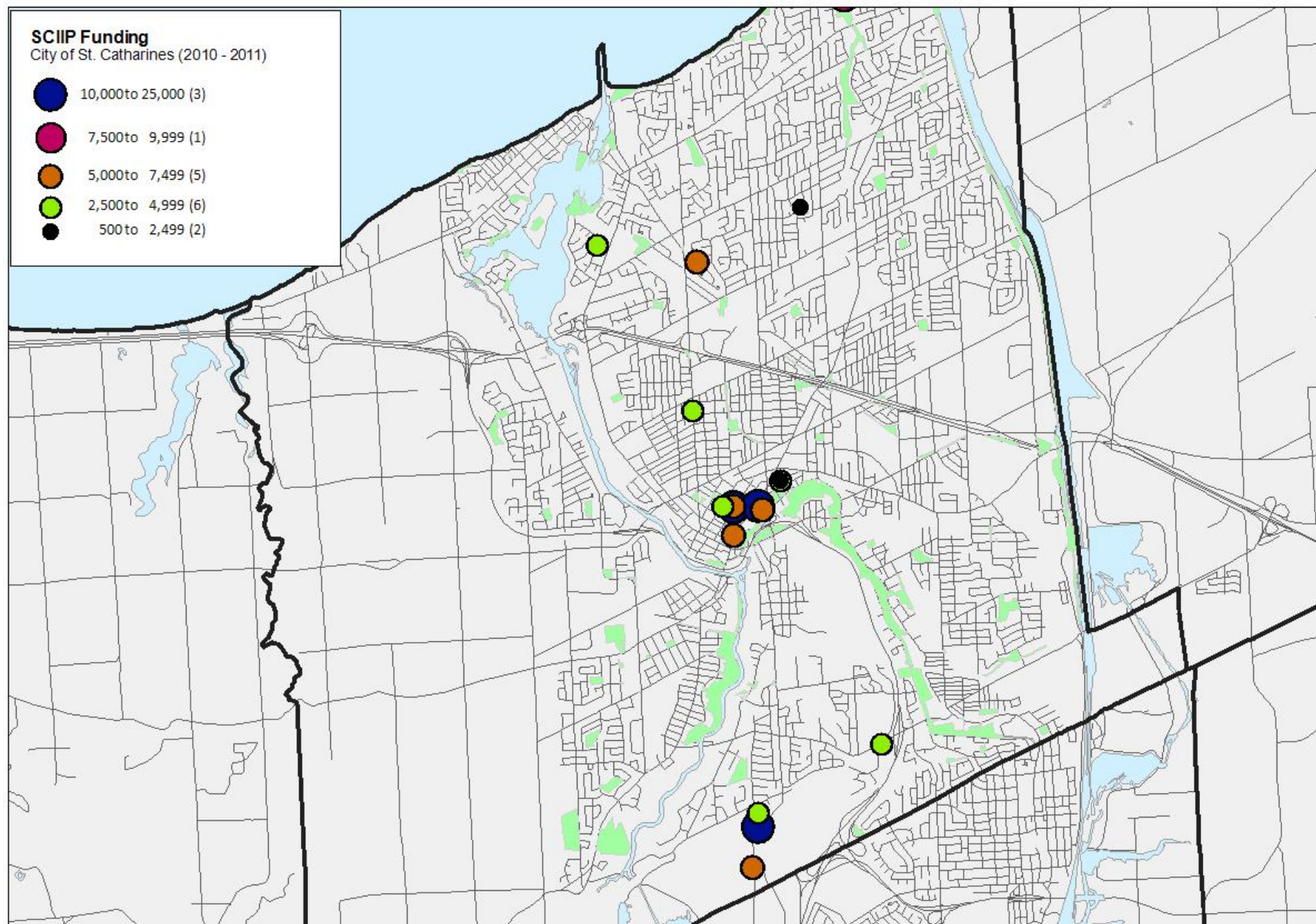
Majority of grants are **under \$7,500K**.

Map includes SCCIP grant funding for **2010-2011**.



SCIIP Funding

City of St. Catharines (2010 - 2011)



2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

Economic impact means something has happened to increase economic activity, including new sales, new earnings for workers and new jobs in the economy.

For SCCIP, we measure economic impacts in terms of two factors:

- Ongoing impacts of grantees (making expenditures in the regional economy).
- Impacts of new audiences, who spend money in association with attendance.

Economic impacts are split between direct and indirect impacts:

- Direct impacts measure the economic effect of the initial expenditure made by arts groups or audiences.
- Indirect impacts occur as people and business receive that initial \$\$ and re-spend it.

Important note:

- These estimates are very conservative, and are NOT representative of all arts and cultural activity in St. Catharines.
- They are developed using data that is available to us from SCCIP recipients.

2. SCCIP Economic Impact

Economic Impact Methodology

Multipliers

The shift from direct to indirect impacts is measured using multipliers that come from an **“input-output” model**. Multipliers translate an input to an output. For example, a dollar spent on food (input) has an impact on the local economy by virtue of new sales and new jobs created in that industry (output).

There are two multipliers for every industry:

- Output Multiplier: Estimate of total new sales associated with the expenditure.
- Employment estimate: Forecasts the jobs created in each industry as a result of new expenditures.

Methodology

- Provincial multipliers are used from input-output tables produced by Statistics Canada.
- There are some limitations, as the multipliers are provincial not local, and shifts may have occurred in market share for industries, changes in technology, etc.

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

The Impact of SCCIP organizations spending in the region.

The following chart shows how operating outputs are calculated using the series of expenditures by SCCIP grantees:

Impacts of SCCIP Spending on Ontario 2009					
Base Year Budget	Inputs	Multipliers		Outputs	
Category	Purchases	Gross Production	Empl't (FTE)	New Sales (\$000's)	New Empl't (jobs)
Electric Power Generation, Transmission and Distr	\$ 406	1.27	4.35	\$ 516	0.0
Natural Gas Distribution, Water, Sewage and Other	\$ 38,470	1.30	4.97	\$ 50,011	0.2
Printing and Related Support Activities	\$ 80,227	1.34	6.88	\$ 107,504	0.6
Retail Trade	\$ 178,254	1.41	15.47	\$ 251,338	2.8
Transit and ground passenger transportation	\$ 52,906	1.53	16.70	\$ 80,945	0.9
Postal service, couriers and messengers	\$ 44,299	1.43	12.55	\$ 63,348	0.6
Motion picture and sound recording industries	\$ 221,966	1.58	8.09	\$ 350,706	1.8
Radio and Television Broadcasting	\$ 24,517	1.57	8.33	\$ 38,492	0.2
Publishing, info services and data processing	\$ 38,064	1.48	8.72	\$ 56,334	0.3
Finance, insurance, real estate, rental and leasing	\$ 70,139	1.68	8.30	\$ 117,834	0.6
Administrative support services	\$ 115,536	1.33	17.20	\$ 153,663	2.0
Waste management	\$ 38,470	1.35	7.23	\$ 51,934	0.3
Arts, entertainment and recreation	\$ 283,654	1.54	15.76	\$ 436,826	4.5
Accommodation and food services	\$ 41,347	1.53	18.31	\$ 63,261	0.8
Repair and maintenance	\$ 17,941	1.39	17.39	\$ 24,938	0.3
Nonprofit educational services	\$ 122,946	1.24	11.71	\$ 152,453	1.4
Averages and Totals	\$ 1,369,142	1.44	11.37	\$ 2,000,105	17.1

The exercise allows us to project the impact of SCCIP grantees on the Province, as described on the next slide.

- Expenses for all SCCIP recipients are totaled. Wages are subtracted and the balance, which includes 12 types of program expenses and 6 types of operating expenses are classified and divided among the appropriate categories for which multipliers

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

The Impact of SCCIP organizations spending in the region.

The analysis suggests that in 2009, the City invested \$150K as grants to SCCIP recipients.

Those recipients ***spent a total of \$1.4M on non-personnel expenditures***, such as marketing, facilities, exhibition, program and production expenses, touring expenses, education, fundraising and otherwise.

That \$1.4M, which was spent by SCCIP recipients on those various goods and services, was then ***re-spent*** by regional businesses and service providers, becoming ***\$2.0M*** in other sales in Ontario and supporting ***17 FTE jobs beyond those employed by SCCIP organizations.***

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

The impact of audiences attending events and spending in the region.

- We also project the spending and overall impacts of audiences on the region.
- Based on input from a selection of SCCIP recipients and the fact that the multipliers are Provincial, the balance is split between regional audiences (90%), Ontario audiences traveling from outside the region (8%) and audiences traveling from areas outside of the Province (2%).

Estimated Attendance 2009		
Reported Attendance to Programs offered by SCCIP Grantees		55,687
1. Ontario (Niagara Region) Attendance	90%	50,118
2. Ontario (non-Niagara Region) Attendance	8%	4,455
3. Regional (non-Ontario) Attendance	2%	1,114

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

The impact of audiences attending events and spending in the region.

- With these estimates, we can project the spending of audiences using statistics from the Arts and Economic Prosperity Report published by Americans for the Arts. (There is no Canadian version of these statistics).
- Americans for the Arts data suggest how much audiences generally spend on eating, drinking, shopping, traveling and so on in conjunction with attending an arts event .
- Provincial multipliers are then applied to these direct impacts to arrive at total impacts associated with audience expenditures.

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

The impact of audiences attending events and spending in the region.

- Regional, non-regional and total impacts are shown below on the chart.
- Audience expenditures of \$929K were re-spent by businesses and service providers, leading to annual outputs of \$1.4M and 16 FTE.**

Ancillary Spending Impacts 2009	Per Capita Expenditure Estimate	Total Direct Expenditures of Audiences	Gross Production Multiplier	Gross Production	Empl't (jobs) Multiplier	Total New Jobs
Resident Attendance (1)						
Accommodation and food services	\$8.15	\$408,464	1.5300	\$624,950	18.3100	7.48
Retail Trade	\$2.80	\$140,331	1.4100	\$197,867	15.4700	2.17
Transit and ground passenger transportation	\$4.27	\$214,005	1.5300	\$327,428	16.7000	3.57
<i>Sub-total</i>		\$762,801		\$1,150,245		13.22
Non-resident Attendance (2+3)						
Food services and drinking places	\$15.28	\$85,090	1.5300	\$130,187	18.3100	1.56
Retail Trade	\$8.70	\$48,448	1.4100	\$68,311	15.4700	0.75
Transit & passenger transportation	\$5.82	\$32,410	1.5300	\$49,587	16.7000	0.54
<i>Sub-total</i>		\$165,947		\$248,086		2.85
Total Impact of Ancillary Spending						
	Regional Attenders	\$762,801		\$1,150,245		13.22
	Non-regional Attenders	\$165,947		\$248,086		2.85
	Total	\$928,748		\$1,398,331		16.07

2. SCCIP Economic Impact

Impact of SCCIP Recipient Spending

Annual economic impact over time

- We completed this analysis for 2009, 2010 and 2011, using expenditure data from SCCIP grantees (*including only those grantees for which data is available*).
- The results show that **impacts of spending are increasing over time** as the amount spent by grantees increases.
- For 2011, **these impacts are significant, generating \$2.5M in new sales and 21.7 new jobs.**

Impacts of SCCIP Grantee Spending on Ontario			
	Inputs	Outputs	
Year	Purchases	New Sales (\$000's)	New Empl't (jobs)
2009	\$ 1,369,142	\$ 2,000,105	17.1
2010	\$ 1,515,391	\$ 2,204,697	19.0
2011	\$ 1,705,779	\$ 2,498,260	21.7

2. SCCIP Economic Impact

Impact of Audience Spending

Annual economic impact over time

- The impacts of audiences decrease as reported attendance declines. However, these audience figures are estimates provided by a selection of SCCIP recipients and do not represent St. Catharines arts attendance.
- Even still, the impacts are notable, bringing about **\$1.2M** in spending to St. Catharines each year and supporting **14 FTE jobs** in addition to those created via direct spending and employed by grantees.

Audience Spending Impact		Total Direct (Induced) Expenditures	Gross Production	Total New Jobs
2009	Regional Attenders	\$762,801	\$1,150,245	13.22
	Non-regional Attenders	\$165,947	\$248,086	2.85
	Total	\$928,748	\$1,398,331	16.07
2010	Regional Attenders	\$693,612	\$1,045,914	12.02
	Non-regional Attenders	\$150,895	\$225,583	2.59
	Total	\$844,507	\$1,271,497	14.61
2011	Regional Attenders	\$692,886	\$1,044,819	12.01
	Non-regional Attenders	\$150,737	\$225,347	2.59
	Total	\$843,623	\$1,270,166	14.60

2. SCCIP Economic Impact

Economic Impact of SCCIP Recipients

Total annual impact over time (SCCIP recipients and audiences)

- Overall, SCCIP grantees provide significant impact to St. Catharines and Ontario. Grantees and their audiences directly spent more than \$2.5M in 2011. Those funds were then re-spent, leading to more than \$3.7M in indirect spending by other Ontario entities and the support of 36 FTE jobs. Again, these figures are minimum estimates.

Impact of SCCIP Grantee Spending on Ontario			
Year	Expenditures (Direct Impact of Grantees + Audiences)	Outputs (Indirect Impact)	Employment (Jobs)
2009	\$ 2,297,889	\$ 3,398,435	33.17
2010	\$ 2,359,899	\$ 3,476,195	33.65
2011	\$ 2,549,402	\$ 3,768,426	36.25

3. Analysis of Cultural Participation

3. Cultural Participation Analysis - Introduction

What is Cultural Participation

Cultural participation is experience and involvement in arts and culture. That is, the host of expressions and forums where creative output is showcased, including the performing arts, visual arts, storytelling and folk traditions, culinary arts, and multimedia.

The Cultural Participant: Trends

The cultural participant:

- Has limited leisure time and an overabundance of activities to choose from;
- Is aging;
- Has increasing niche cultural tastes;
- Seeks a meaningful and multi-tiered cultural experience;
- Pursues social opportunities through culture.

Residents who actively participate in the arts are more likely to seek out arts experiences.

Promoting fun and engaging cultural participation activities is about building future audiences.

3. Cultural Participation Analysis - Introduction

What has been Studied

- **City facilities and programming:**
 - Museum and Welland Canals Centre
 - Russell Avenue Community Centre
 - St. Catharines Public Library
 - Older Adult Centres
 - Lakeside Park Carousel - Ridership
- **Cultural participation in the community**
 - Niagara Folk Arts Festival – park event
 - Niagara Wine Festival
 - Doors Open Niagara in St. Catharines
 - Centre for the Arts at Brock University

3. Cultural Participation Analysis - Attendance/Participation at City facilities

Attendance at City Facilities - Overview

	2004	2008	2011	Overview
St. Catharines Museum and Welland Canals Centre	166,433	137,354	101,815	Admission by Donation policy since May 2011 has contributed to 174% visitation increase. Visitation to the Centre has declined due to border-related issues such as currency exchange rates, restrictive passport laws, and SARS.
Public Library	-	462,424	450,523	Visitation is stable in all four branches.
Older Adult Centres	-	-	7,306	Participation has increased by 83% from 2010 to 2011.
Carousel Ridership	-	241,461	226,680	Visitation is fairly stable. Peaks in July and August.
Russell Avenue Centre	764	546	387	Visitation drop may to be related to a decrease in program offerings (from 30 in 2004 to 11 in 2011).
Band Concerts in Montebello Park	-	-	3,111	Attendance has tripled from 2010 to 2011.

3. Cultural Participation Analysis - Attendance/Participation at City facilities

St. Catharines Museum and Welland Canals Centre: Findings

Visitation to the Museum has been greatly supported by an Admission by Donation policy since May 2011:

- Monthly visitation has increased by 174% on average.
- Total visitation in 2011 saw an all-time record of 33,000 visitors.

Special events/activities* have a positive impact on overall visitation:

- 14% of museum annual visitors are participants in special events (average, 2003-11).
- Special events boost participation – example: Xmas Break activities in Jan 2012 resulted in 10 times more visits (1,731) than those registered in the same period in 2011, when no special event took place (other similar examples include Star Lab 2007 or DinoMobile 2005).

School Tours have decreased by 71% from 2004 to 2011. Generally, school tours are affected by school bus costs, program costs (there is an admission fee for public and school tours), outreach and curriculum priorities, and overall school budgets.

* For the purposes of this report these include all programs other than Exhibits.

3. Cultural Participation Analysis - Attendance/Participation at City facilities

St. Catharines Museum and Welland Canals Centre: Findings

Since 2008 special events/activities are being offered for free or at a very low cost.

This has an impact on:

- Activities participation (strength): has increased by 63% from 2008 to 2011.
- Revenue generation (challenge): Average revenue per participant has decreased from \$5.75 in 2008 to \$0.29 in 2011. Total income from programs has decreased by 530% in 3 years.

There is a new approach to programming that invites and encourages public participation and sharing of personal histories

- Has a potential to result in an increase of participation and greater engagement.

Transportation planning:

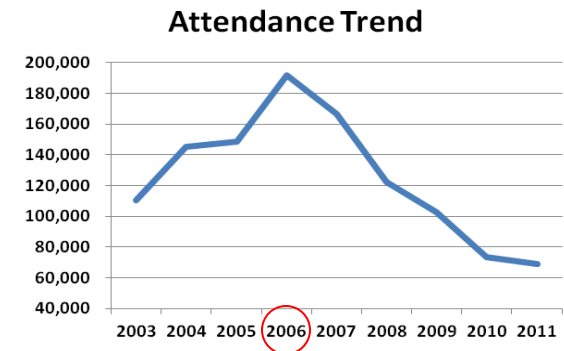
- Lack of bus service to the Museum could be limiting accessibility and participation.

3. Cultural Participation Analysis - Attendance/Participation at City facilities

St. Catharines Museum and Welland Canals Centre: Findings

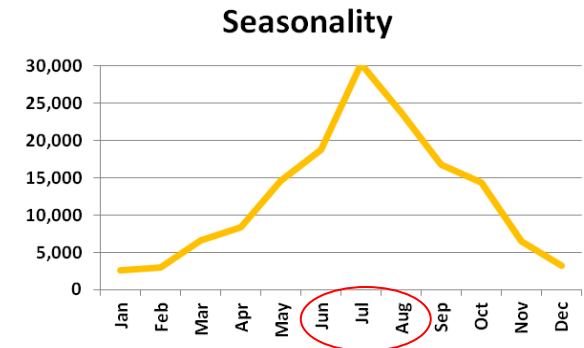
In line with many Niagara-border institutions, visitation to the Centre has declined in recent years:

- Visitation peaked in 2006 (192,000) and has decreased since by 64%.
- The SARS outbreak, change in passport policies, and currency exchange rates have contributed to this trend.



Attendance to the Centre shows a high seasonality

- June-July-August is the busiest period, concentrating 45% of annual attendance (avge. 2006-11).
- This is likely the result of a large % of its visitors being tourists, who concentrate their visit to the municipality in the summer months.



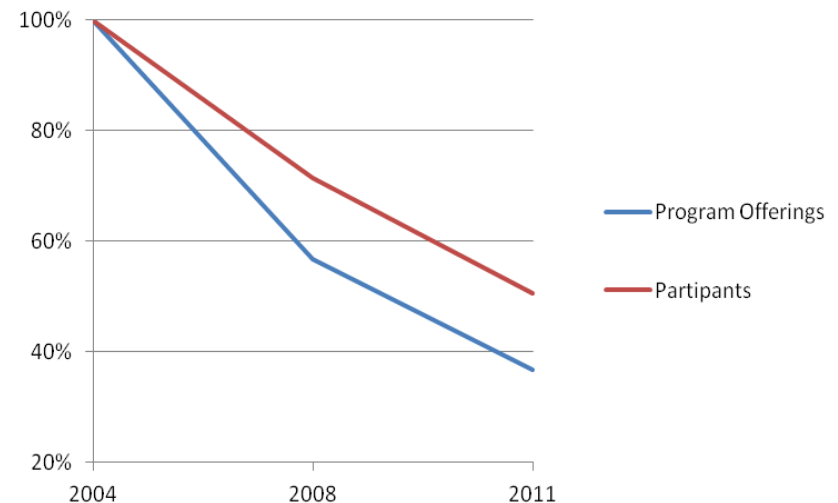
3. Cultural Participation Analysis - Attendance/Participation at City facilities

Russell Ave. Community Centre: Findings

Since 2004, both program Offerings and Participants have decreased by over 50% (not taking into account general trends in recreational programming).

- This suggests a strong correlation between Program Offerings and Cultural Participation.
- However, about 30% of culture-related programs originally offered (for years 2004, 2008, and 2011) were cancelled due to lack of enrollment.

Average participation per activity has also decreased, from 21 in 2004 and 2008, to 9 in 2011.



RUSSELL AVE.	2004	2008	2011
Program Offerings	30	17	11
Participants	764	546	387

3. Cultural Participation Analysis - Attendance/Participation at City facilities

Russell Ave. Community Centre: Findings

Participation in recreation programs shows a high seasonality:

- The Fall concentrates almost 40% of annual enrollment.
- Possibly related to the publication cycle of Leisure Guide.

More children participate in culture-related recreation programs than adults:

- While less than half of programs are addressed to children (45%), these generate 70% of overall participation.

There is little variety in the themes offered (2011 data):

- 63% of programs offered are dance programs (hip hop, tap dance, tiny tot dance, line dancing), and 30% are guitar lessons.
- Crafts activities are not offered any more, while they seemed to be successful in the past (in 2004 pottery had an average of 40 participants per term).

3. Cultural Participation Analysis - Attendance/Participation at City facilities

Russell Ave. Community Centre: Mapping Cultural Participation

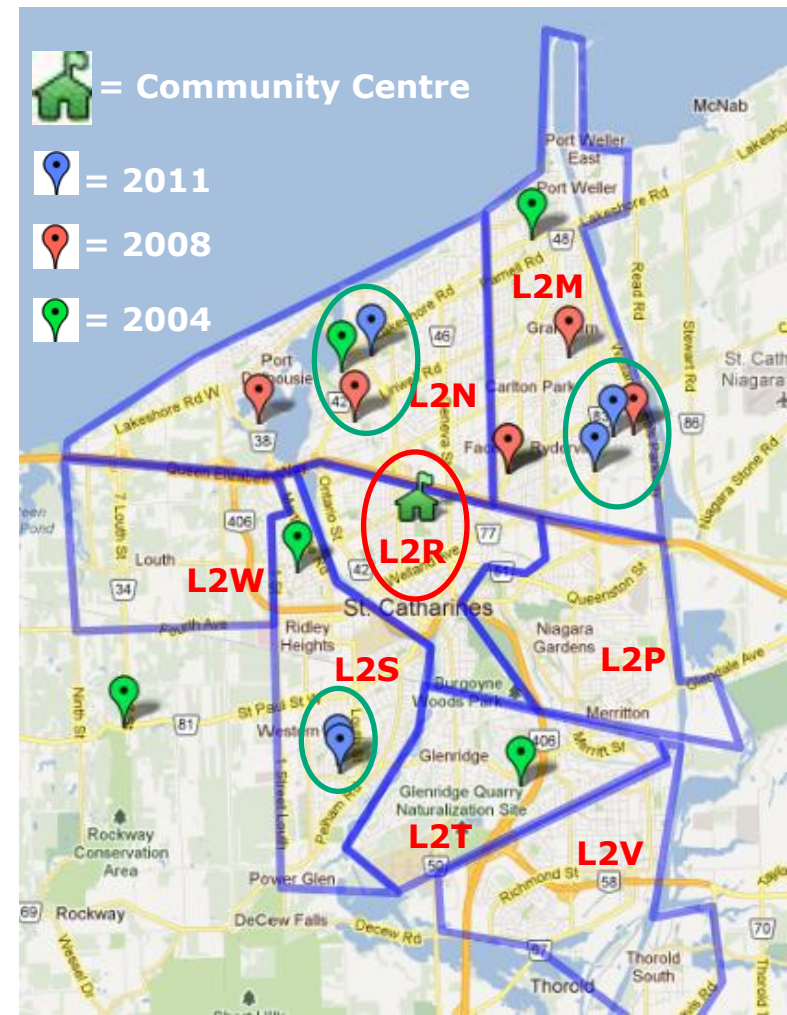
- The Community Centre is conveniently **located downtown**, in the geographic centre of the City.
- **The most culturally active district is the North End (L2M, L2N):** shows consistent participation rates across the 3 periods. Note: most populated area.
- **Western Hill (L2S) shows a rise** in cultural participation compared to previous years.
- Downtown (L2R), St. Catharines East (L2P), South End (L2V) and the West End (L2W) show the least cultural participation rates.

Note to Mapping: the 5 most active zip codes in terms of enrolment to Centre programs are represented by the following symbols for each of the following years:

-2011:

-2008:

-2004:



3. Cultural Participation Analysis - Attendance/Participation at City facilities

Public Library: Findings

Library Location	Attendance 2004	Attendance 2008	Attendance 2011
Central	282,380	244,358	244,255
Grantham	146,673	138,016	125,346
Merritt	67,909	63,910	64,855
Port Dalhousie	10,085	16,140	16,067
Total	507,047	462,424	450,523

- Total annual visitation to all four branches is **stable in the 450,000** range.
- The figures do not include individuals who are participating in meetings in the Meeting rooms, nor “remote visits”, thus **suggesting that the impact of the Library is well beyond** the 450,000 figure.
- 2004 visitation data is estimated, whereas 2008 and 2011 is based on electronic counters. This suggests that the lower figures after 2004 are not a result of lower visitation but of more accurate counting.
- The Central branch is the most popular, followed by Grantham.
- In 2011, the Library held **17 Culture Focused Displays, 7 programs for Children, 6 for Young Adults, and over 12 for Adults**. Program types range from Writers Clubs to Writing Contests and Book Clubs; from Concerts to Seminars, and Poetry Readings; among other.

3. Cultural Participation Analysis - Attendance/Participation at City facilities

Older Adult Centres: Findings

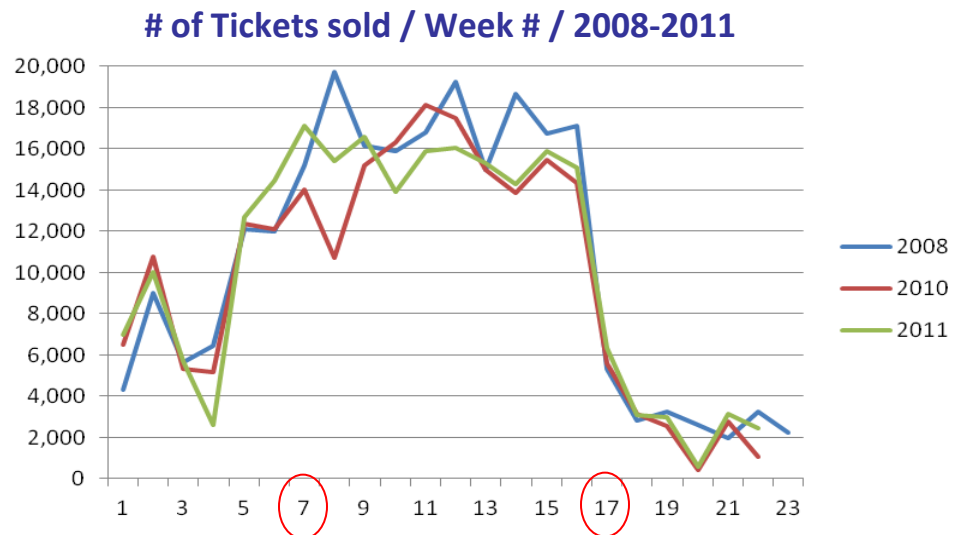
- **Dunlop Drive Centre** offers the largest number of programs (10) and receives the most participants: 5,416 in 2011 (75% of total Older Adult participation).
- **All four centres have seen considerable increases** in cultural participation from 2010 to 2011, with an average of 83% increase.
- **Dancing programs** (ie. Line Dancing, Tea Dance) and **Special Events** draw the highest participation.

		2010	2011	%
TOTAL		4,000	7,306	83%
Dunlop Drive Centre		2,560	5,416	112%
	Line Dancing	487	908	86%
	Ballroom Dancing	70	408	483%
	Bunka Punch Art	183	404	121%
	Painting	160	311	94%
	Crafts	38	164	332%
	Quilting	177	295	67%
	Tea Dance	438	1,013	131%
	Wood Carving	15	265	1667%
	Clogging	120	-	
	Special Events	872	1,648	89%
Port Dalhousie Centre		570	713	25%
	Special Events	324	335	3%
	Quilting	69	47	- 32%
	Wood Carving	177	331	87%
West St. Catharines		553	632	14%
	Carpet Bowling	183	161	- 12%
	Special Events	370	366	- 1%
	Zumba (Drop-In)	-	105	
Merritton Centre		317	545	72%
	Round Dancing	317	545	72%

3. Cultural Participation Analysis - Attendance/Participation at City facilities

Lakeside Park Carousel – Ridership: Findings

- The Carousel is open to the public for **22-23 weeks a year**, starting on Victoria Day Weekend (mid-May) and ending on Thanksgiving Weekend (mid-October).
- Total visitation across 2008-2011 is **stable in the 230,000 range**.
- The **weekends concentrate 33%** of weekly visitation (only weeks with 7-day activity have been considered for this calculation – when closed during weekdays, the percentage is even higher).
- Peak visitation coincides with the **summer season**: from week 7 (end of June) to week 16 (end of August).
- Visitation **falls by 60-70%** from week 16 to week 17.



3. Cultural Participation Analysis - Cultural participation in the community

Overview of Cultural Participation in Community

	Year	Attendance	Overview
Niagara Wine Festival	2009	98,844	Visitation is projected to continue increasing, as is its economic impact. Potential exists to attract more tourists (to increase length of stay in St. Catharines).
	2010	100,008	
Folk Arts Festival in the Park	2009	19,275	The Festival received 19,275 participants in 2009.
Doors Open Niagara	2005	4,055	Increased site animation and effective marketing moving forward may reverse a decrease in visitation (in 2007 - last data available) and increase tourist attraction.
	2006	2,895	
	2007	2,374	
Centre for the Arts at Brock University	2009	27,013	Analysis shows an excellent performance: attendance and program offerings reached a maximum in 2011, and revenues have increased by 21% since 2007.
	2010	25,899	
	2011	29,000	

3. Cultural Participation Analysis - Cultural participation in the community

Doors Open Niagara in St. Catharines: Findings

Overview: St. Catharines participated from 2003-2010, and again in 2012, with anywhere from 5-13 sites per year. 6 City sites have participated, although not consistently, and the City's previous role as community developer for the event ended in 2007.

Data Analysis:

- Participation declined by 60% after 2005.
- Revenues declined by 43% from 2006 to 2007, despite the same number of sites open.
- Each visitor spent less than \$1 on average, which means that the revenue generated by the event was very limited.

DOORS OPEN	2003	2005	2006	2007
Number of sites	10	11	10	10
City sites %	50%	27%	40%	40%
Total visitors	2,760	4,055	2,895	2,374
Total money raised	\$ 2,661	\$ 1,754	\$ 2,682	\$ 1,540
Total volunteers	65	NA	NA	73

3. Cultural Participation Analysis - Cultural participation in the community

Doors Open Niagara in St. Catharines: Findings

The event requires re-evaluation to increase its impact:

- Doors Open Niagara is operated by the Binational Tourism Alliance. Locally-based engagement has deteriorated since the City reduced its involvement.
- Consider a St. Catharines Doors Open or re-engage with the BTA to re-build the event locally. How this event moves forward should depend on a review of the following:
 - An evaluation of the primary purpose of the event – is it to engage local residents with their heritage and architecture, or is it to develop tourism interest in local sites?
 - A review of the BTA's success in implementing effective and wide reaching advertising to attract tourists.
 - Staff and volunteer resources to assist with site cultivation, enhanced animation at the sites and new visitor experiences from one year to the next to create buzz and repeat visitation.
 - Budget capacity to promote an independent St. Catharines-based event.

3. Cultural Participation Analysis - Cultural participation in the community

Niagara Wine Festival: Findings

An event that can be further optimized

- Attendance increased moderately in 2010, and was projected to continue increasing in 2011 (assumption to be contrasted with 2011 real data).
- Average length of stay was also projected to increase from 1 night to 2 nights in 2011 (needs to be confirmed against real data).
- Economic impact has increased dramatically: almost doubled from 2009-10. As a result more jobs have been created and more taxes have been collected.
- 46% of participants to the Festival were 80-100% satisfied with the overall event.

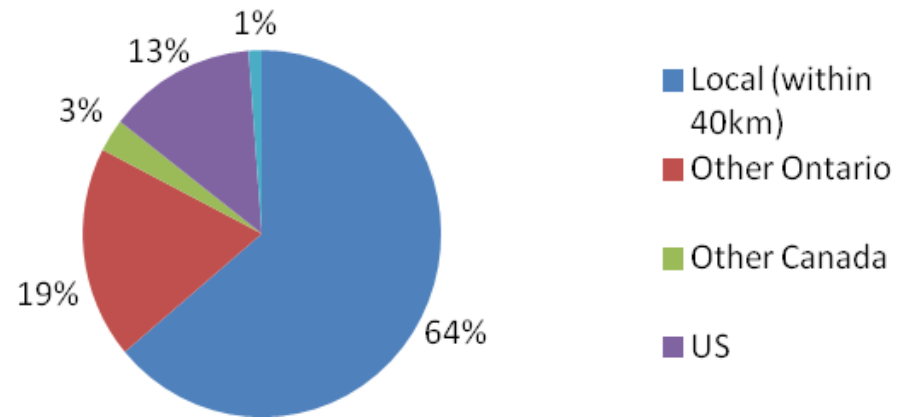
Niagara Wine Festival	2009	2010
Attendees	98,844	100,008
Average length of stay	1	1
Average Non-Local Spending	\$138.22	\$145.61
Economic Impact	\$4,095,350	\$7,547,304
Full Year Jobs Supported	39.3	50.4
Taxes for all three levels of government	\$812,415.00	\$1,405,883.00

3. Cultural Participation Analysis - Cultural participation in the community

Niagara Wine Festival: Findings

Most visitors to the festival are local or from Ontario:

- 72% of visitors are repeat visitors.
- Only 25% of participants travelled more than 40km to participate.
- As per the chart, 83% of visitors are from either St. Catharines or Ontario. Only 1% are from outside North America.
- However, the trend seems to point towards increased “internationalization” (audiences were even more local in 2009: 86% of visitors from St. Catharines, vs. 64% in 2010).



The event is more popular among adults than younger segments:

- 46% of participants were over the age of 45. This indicates low participation of children and youth.

3. Cultural Participation Analysis - Cultural participation in the community

Niagara Folk Arts Festival: Findings

The Festival received 19,275 participants in 2009*. This is much more than the Doors Open event, but less than Wine Festival.

*Please note that no data was available for 2010 and 2011 in the case of the Folks Arts in the Park Festival to determine a trend.

3. Cultural Participation Analysis - Cultural participation in the community

Centre for the Arts at Brock University: Findings

- Average Attendance per event during the period 2007-2011 remains very stable within the range 387-422.
- Total attendance saw an all-time high in 2011, at 29,000 visitors or 76% of total capacity.
- CFTA's commitment to programming is demonstrable: **The number of programs and total capacity peaked in 2010-2011.**
- Further, **net revenues have increased by 21%** in the last four years, despite downward economic trends.
- Note that the CFTA is the future presentation program for the St. Catharines Downtown Performing Arts Centre.

CFTA	2007-08	2008-09	2009-10	2010-11	Variation
Total Attendance	27,759	27,013	25,899	29,000	4%
Total Capacity	36,878	33,364	32,632	38,088	3%
No. of Programs	69	64	62	75	9%
Visitors/Capacity	75%	81%	79%	76%	1%
Total Revenues	\$699,576	\$701,203	\$802,176	\$848,464	21%
Avge Revenue/Event	\$10,139	\$10,956	\$12,938	\$11,313	12%

Please note that 2011-12 data has not been used in the analysis because it is not final.

3. Cultural Participation Analysis - Conclusions

Key Implications of Cultural Participation Analysis

- A. St. Catharines has diverse offerings for cultural participation, for residents and tourists.*
- B. Events that have seen long term investment have the highest participation and economic impact.*
- C. Recreation-based cultural experiences are diverse and popular with the older adult community, but require development for children, youth and adults.*
- D. Participants are more likely to be residents or from elsewhere in Ontario.*
- E. Cultural participation is concentrated downtown.*

3. Cultural Participation Analysis - Conclusions

A. St. Catharines has diverse offerings for cultural participation, for residents and tourists.

- There are multiple experiences available at a wide range of price points, with the majority of activities available for free or moderate cost.

3. Cultural Participation Analysis - Conclusions

B. Events that have seen long term investment have the highest participation and economic impact.

- The St. Catharines Museum and Welland Canals Centre, the St. Catharines Public Library, the Lakeside Park Carousel, Niagara Wine Festival, and the Centre for the Arts at Brock University all have strong attendance.
- Brock University has subsidized the Centre for the Arts to date, all other primary assets have had ongoing funding from the City of St. Catharines.
- Doors Open Niagara has little or no funding from the City and has been operated by an outside agency which has no role in local community engagement.

3. Cultural Participation Analysis - Conclusions

C. Recreation-based cultural experiences are diverse and popular with the older adult community, but require development for children, youth and adults.

- Consider a review of culture-related programs at the Russell Avenue Community Centre and work with arts providers in the community to cultivate new options.
- Consider mid-year promotions targeted to culture-friendly audiences to cultivate more participation.
- Review how participation information is collected and ensure it is comparable (ie older adults to children to youth.)

3. Cultural Participation Analysis - Conclusions

D. Participants are more likely to be residents or from elsewhere in Ontario.

- Analysis of St. Catharines participation trends suggests that participants to most events are residents, even when the focus is on attracting tourists (with Welland Canal as a clear exception):
- At the **Niagara Wine Festival** in 2010, 83% of visitors were from either St. Catharines or Ontario. Only 1% were from outside North America.
- Certainly, investment in programs offered at **local centres** results in residential participation.
- Tourists have a higher economic impact than residents, hence the importance of cultivating this type of cultural participant.

3. Cultural Participation Analysis - Conclusions

E. Cultural participation is concentrated downtown

- Cultural industries and facilities are concentrated in the downtown area (ie. Russell Ave. Community Centre, Central Library).
- SCCIP funding focus is downtown but also well distributed throughout the City (in smaller grant amounts though).

... but there is potential for arts participation throughout the City

- The most active district in terms of cultural participation seems to be the North End.
- Highest concentrations of educational attainment are located on the outskirts of the City.
- There is limited activity around the university despite the success of CFTA's programs.

4. Performing Arts Centre Analysis

4. Performing Arts Centre Analysis

Research conducted

In order to assess the position of the new Performing Arts Centre within the context of the Culture Plan, we have:

- Reviewed the business plan for the Performing Arts Centre, specifically focusing on rental estimates and rates, the balance of income sources and the suggested City subsidy.
- Researched a number of other Canadian performing arts centre models.
- Revisited the context and content of our previous conversations with PAC and Brock University arts leadership.

4. Performing Arts Centre Analysis

Findings from comparables research

Need for Quantitative and Qualitative Impacts

Cities subsidize cultural facilities with the understanding that those spaces and their associated activities provide significant return on investment in the form of economic and community benefit:

- There are quantitative impacts associated with spending of the Centre and of those attending Centre activity, and,
- There are qualitative impacts in terms of increased cultural vitality, community pride and quality of life, economic development, enhanced educational opportunities and more.

These impacts justify the use of City tax dollars on behalf of the public on an ongoing basis, not only to develop the Centre but to support it as it continues to serve the community.

4. Performing Arts Centre Analysis

Findings from comparables research

Annual contributions have the following characteristics:

- **Size:** City subsidies for similar Performing Arts Centers in comparably sized Ontario communities range from about \$2 to \$7 per capita. If the City were to contribute \$750K for a year (for example), it will amount to \$5.71 per capita (assuming a population of 131,400.)
- **Flexible contribution:** Within most of these scenarios, the annual contribution is not fixed, but is rather dependent on the annual operating budget and anticipated operating result. The City often makes up or shares any gap.
- **General funding requirement:** The subsidies at these other centres support a general funding requirement and are not allocated to any specific purpose or need.

4. Performing Arts Centre Analysis

Findings from comparables research

Rental Rates most often structured to favour not-for-profit corporations, local groups and/or arts organizations:

- Generally, they are either tiered based on the size and status of the renter (non-profits receive lower rates than commercial entities) or the Centre offers a program by which a set of organizations can qualify for reduced rental rates given a set of criteria.

City Participation:

- Centres that are operated by not-for-profit corporations and receive significant City subsidy often have ties to the City. As a result, one or more City designates are required to sit on the Centre's Board of Directors and the City often must approve the Centre's budget before allocating and providing the annual subsidy.

4. Performing Arts Centre Analysis

Recommendations

1. Do not restrict the City's annual contribution to PAC to a particular program or purpose, for the following reasons:

- It is logistically difficult to restrict the City subsidy to a particular use.
- Designating the subsidy for a particular use limits the Centre in its ability to operate sustainably.
- Community members will expect the use of public tax dollars to support the public good. If the annual funding support is allocated to local arts organizations, the public may not easily recognize the direct public benefit.

4. Performing Arts Centre Analysis

Recommendations

2. The City should have an active role in the PAC management:

- The Centre's bylaws should require that City designates participate in its oversight, potentially on the Board of Directors.
- The City should be required to review and approve the Centre's budget, with Centre leadership appearing before City Council to present and qualify the budget before Council approves budget.

4. Performing Arts Centre Analysis

Recommendations

3. Advocate for ongoing support of the Centre:

- The Public must understand that the Centre will provide significant contribution and positive impact to St. Catharines. It will require public support not only initially for its development, but also on an ongoing basis to support programs and activities. This need—as well as the many benefits that the Centre will provide—must be effectively communicated to the public, perhaps as part of a broader arts advocacy campaign.

5. Cultural Mapping & Demographic Analysis

5. Cultural Mapping & Demographic Analysis

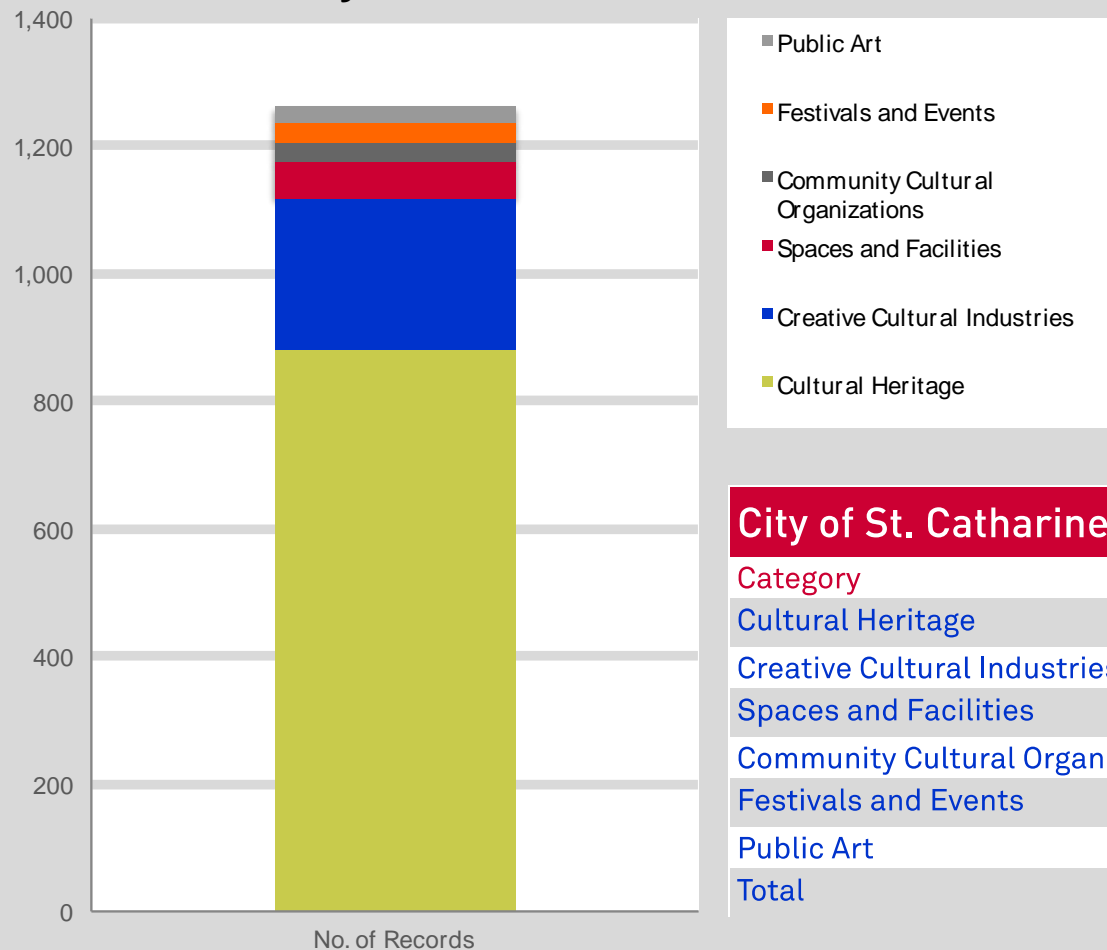
Context

- **The cultural asset inventory was developed using** a review of facilities and/or other assets officially designated as culture by the City and its neighbouring jurisdictions, and a review of the City's existing GIS datasets.
- Using a preliminary set of categories, these assets were **organized by location and mapped**. Icons were assigned to each cultural asset category.
- Demographic data was secured from Environics and layered with cultural assets to understand population characteristics relative to asset locations.
- Note: Cultural assets were not mapped for the "Natural Heritage" category although the City's parks and trails are included in the maps.

5. Cultural Mapping & Demographic Analysis

Cultural Resources Overview

City of St. Catharines: Cultural Resources
By Number of Records



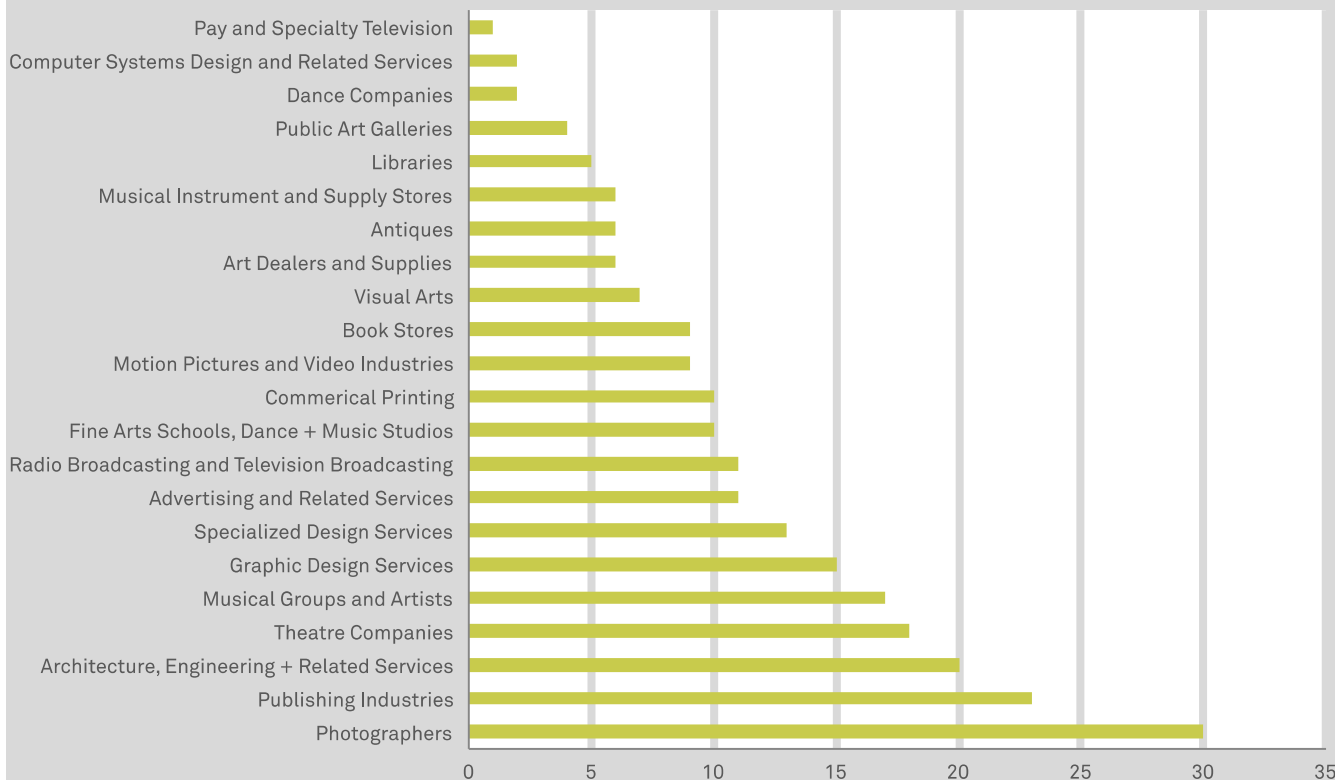
City of St. Catharines: Cultural Resources

Category	No. of Records
Cultural Heritage	882
Creative Cultural Industries	237
Spaces and Facilities	56
Community Cultural Organizations	30
Festivals and Events	29
Public Art	27
Total	1,261

5. Cultural Mapping & Demographic Analysis

Creative Cultural Industries

City of St. Catharines: Creative Cultural Industries

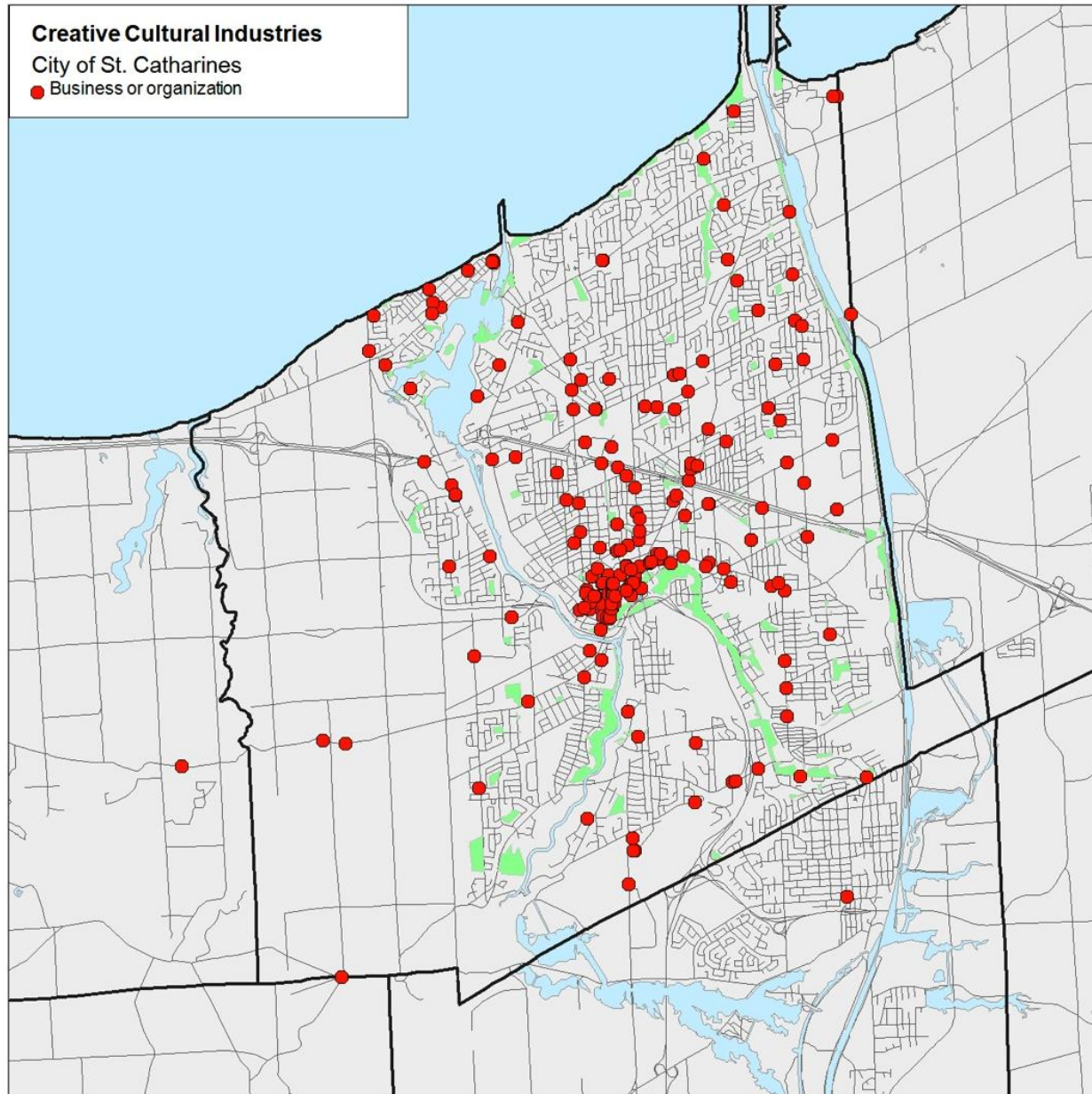


- Review of creative cultural industries data reveals few dance companies but overall strong performing arts.
- Some concern over integrity of the data due to limited software publishers, telecommunications and computer design.

5. Cultural Mapping & Demographic Analysis

Creative Cultural Industries

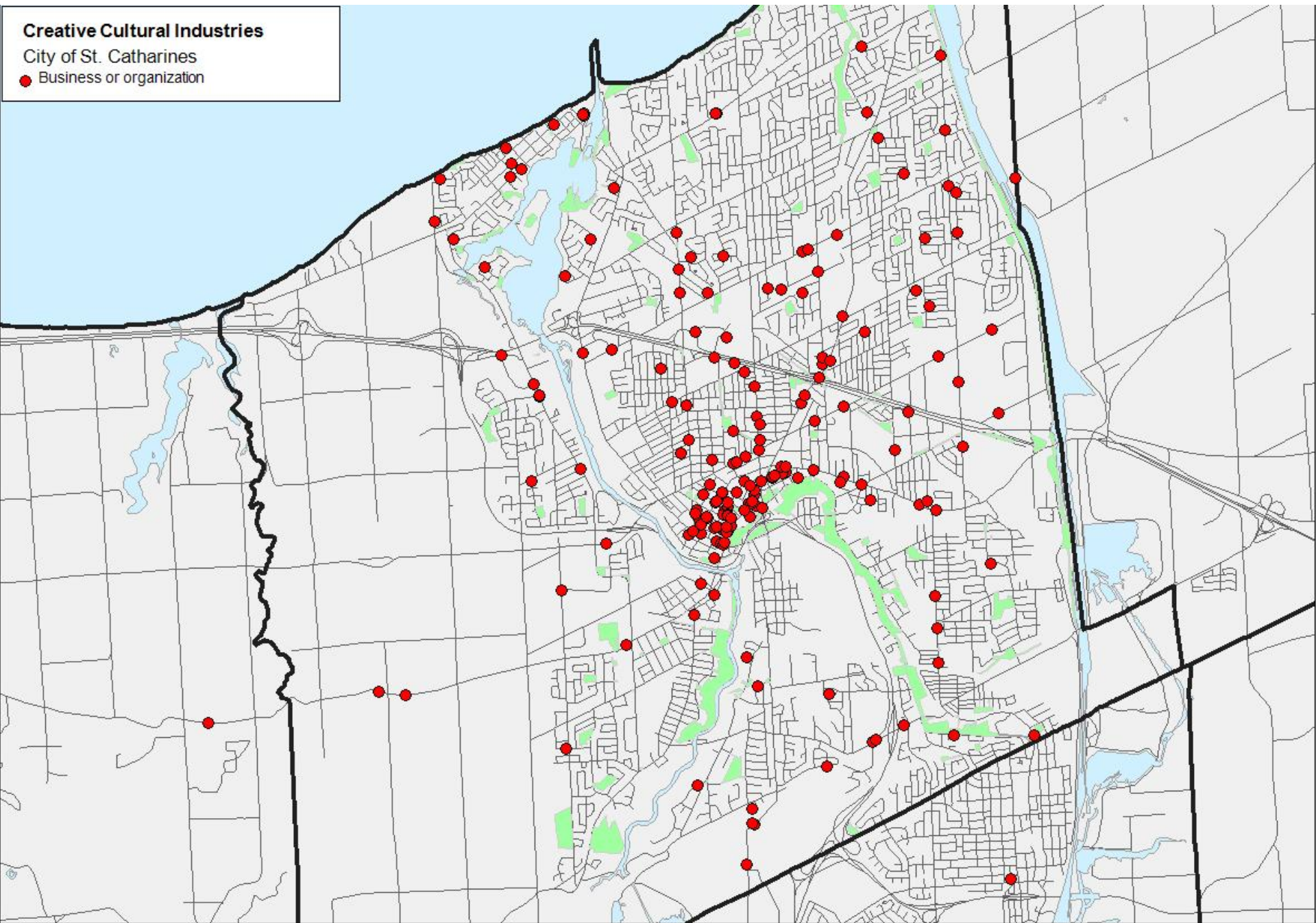
- Industries are concentrated in downtown area.
- Limited impact of University presence in the South quadrant, including lack of campus organizations.
- This may be due to geographical limitations, though other communities include a cultural corridor connecting campuses with downtown.



Creative Cultural Industries

City of St. Catharines

● Business or organization



5. Cultural Mapping & Demographic Analysis

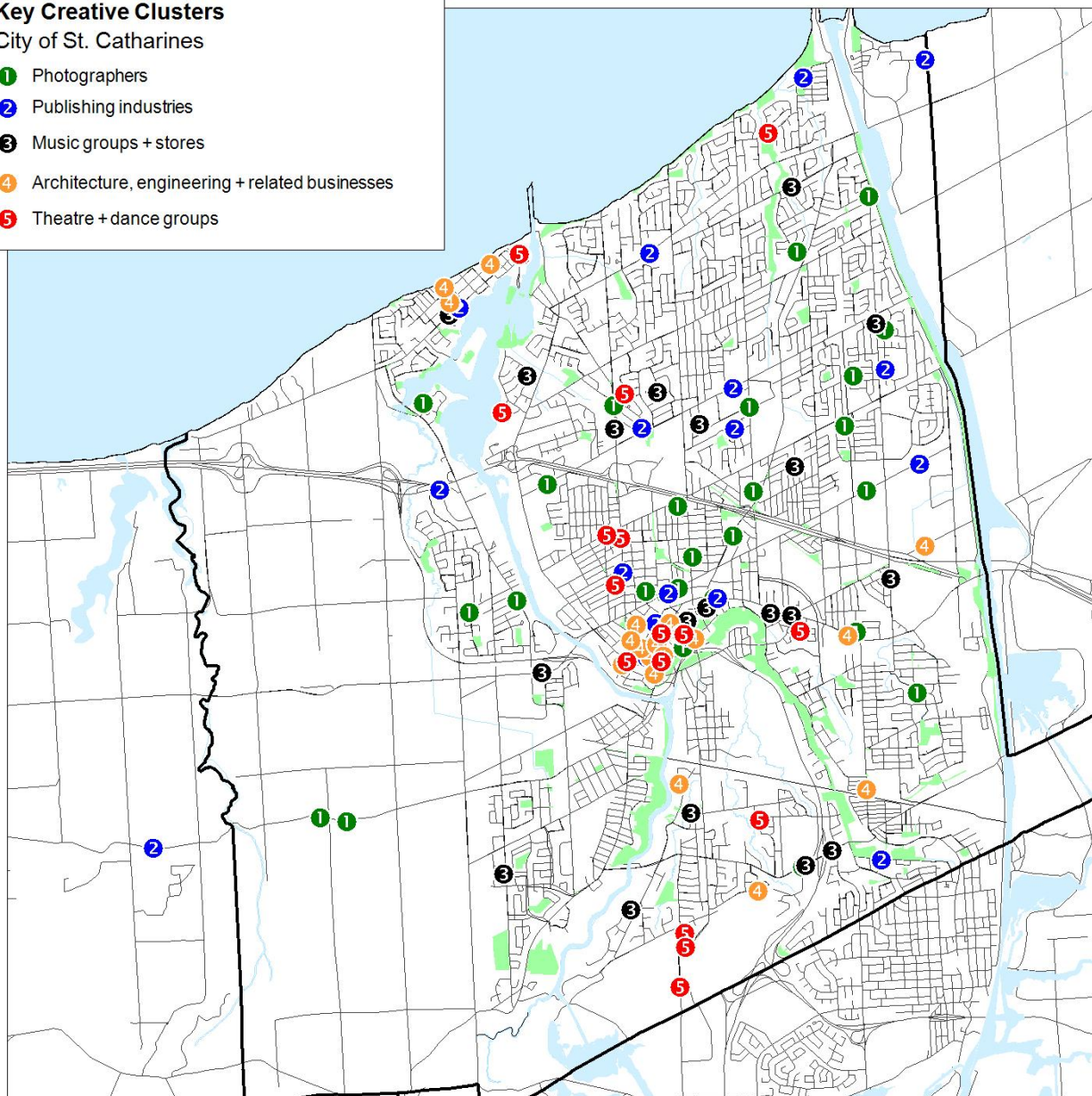
Creative Cultural Industries

- Theatre and dance groups are concentrated downtown.
- Notable concentration of architecture businesses downtown.
- Photographers are well-distributed throughout the City.

Key Creative Clusters

City of St. Catharines

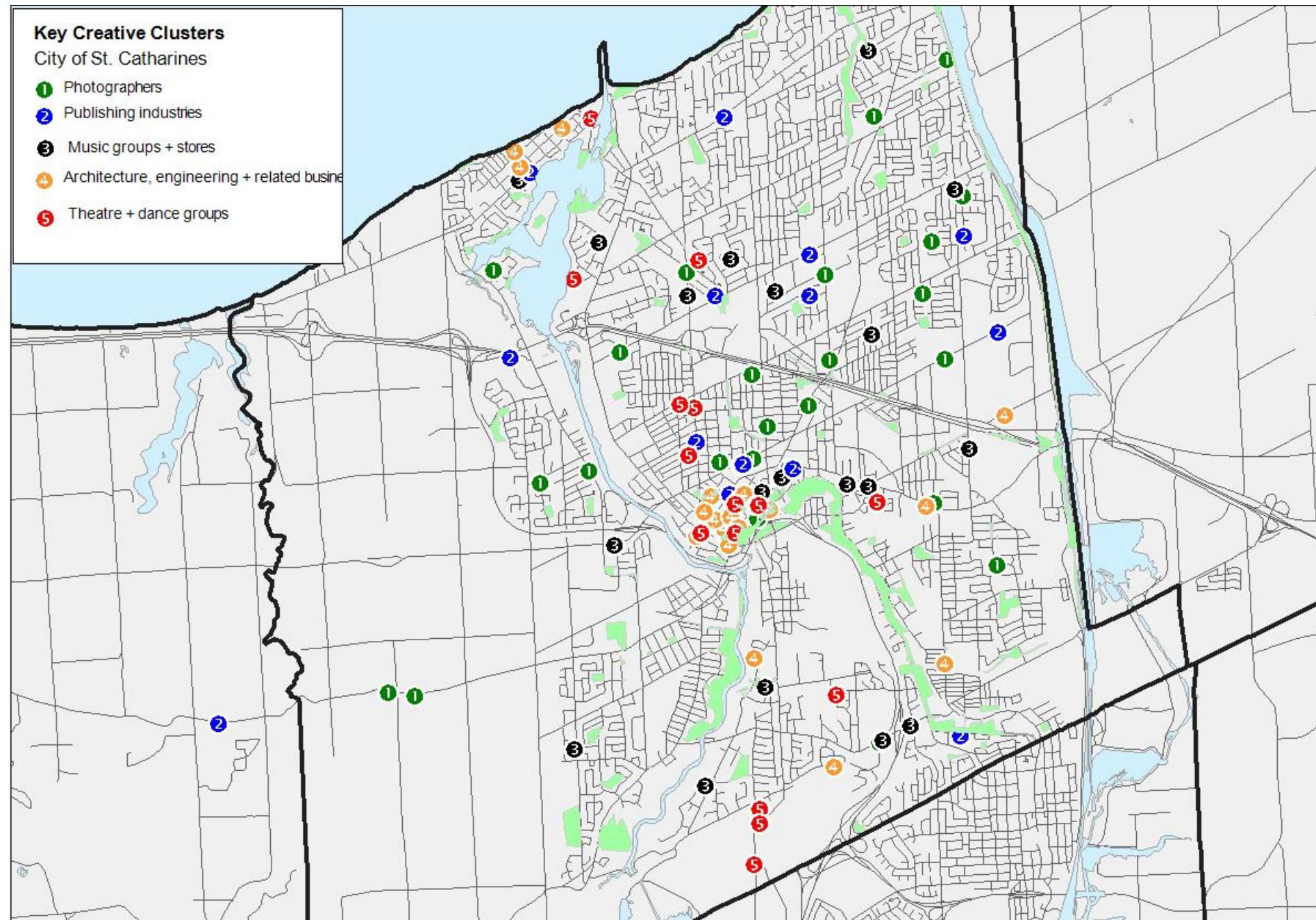
- 1 Photographers
- 2 Publishing industries
- 3 Music groups + stores
- 4 Architecture, engineering + related businesses
- 5 Theatre + dance groups



Key Creative Clusters

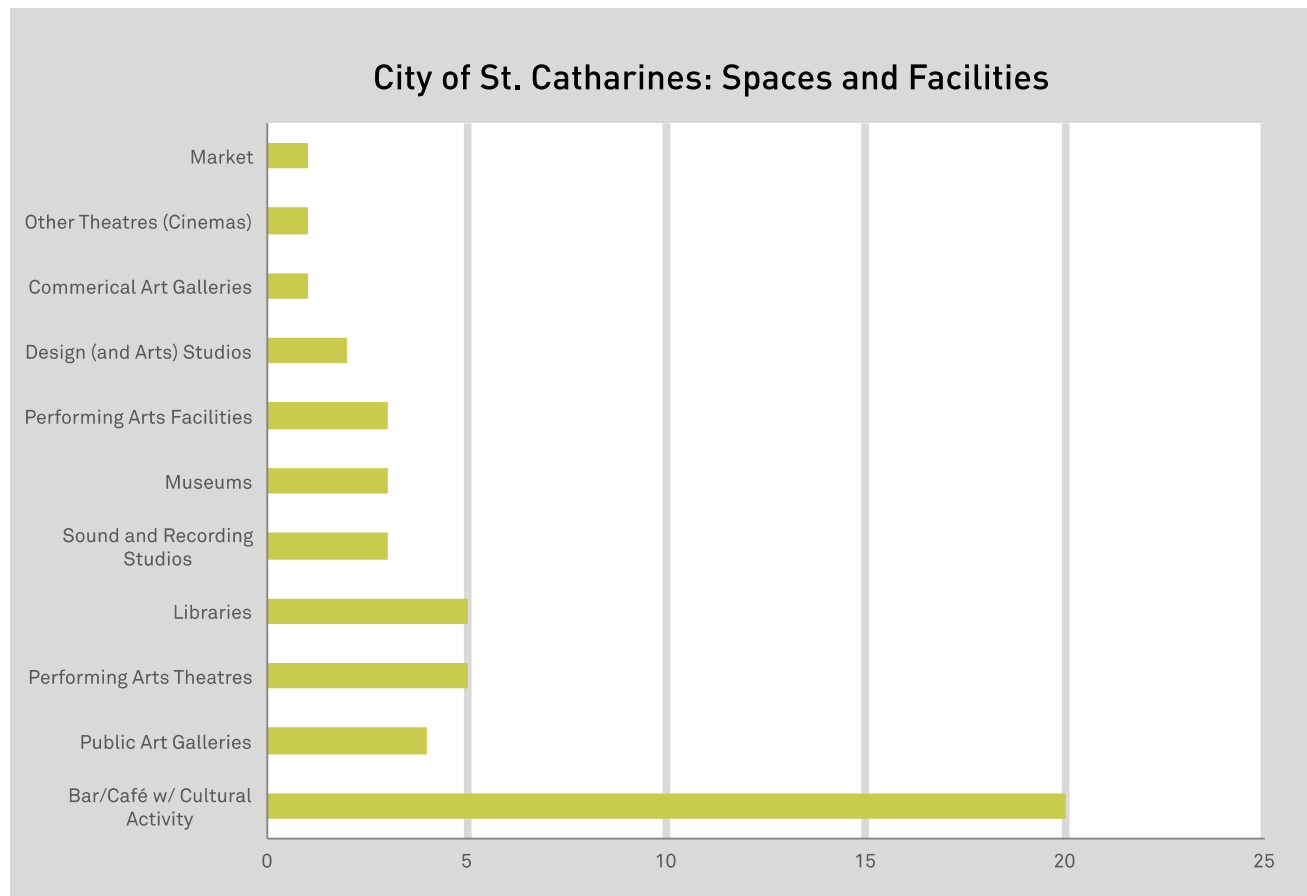
City of St. Catharines

- 1 Photographers
- 2 Publishing industries
- 3 Music groups + stores
- 4 Architecture, engineering + related business
- 5 Theatre + dance groups



5. Cultural Mapping & Demographic Analysis

Spaces and Facilities

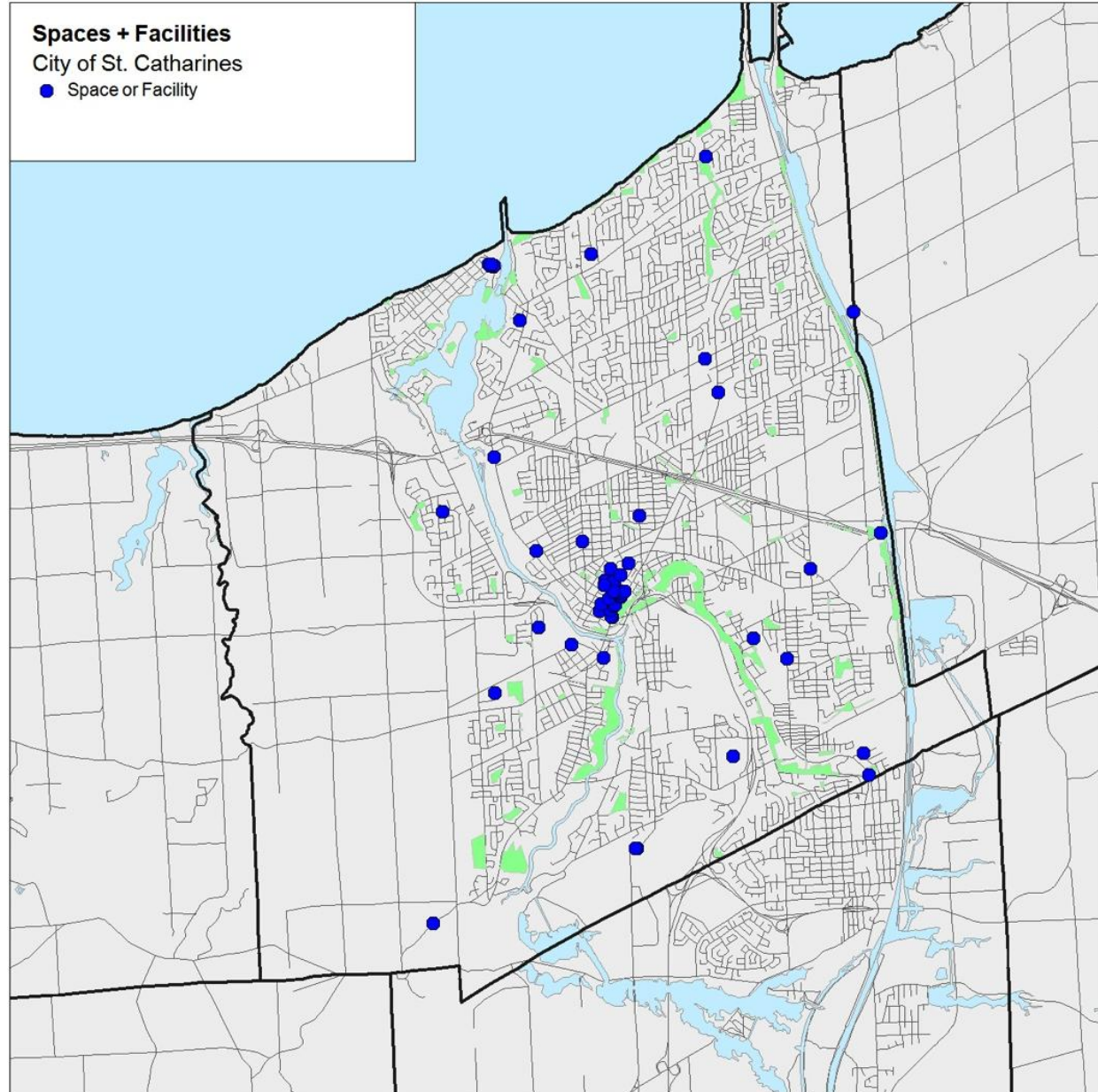


- Comparatively high level of non-traditional venues may indicate amateur and informal activity.
- Few design studios.
- Few commercial art galleries.

5. Cultural Mapping & Demographic Analysis

Spaces & Facilities

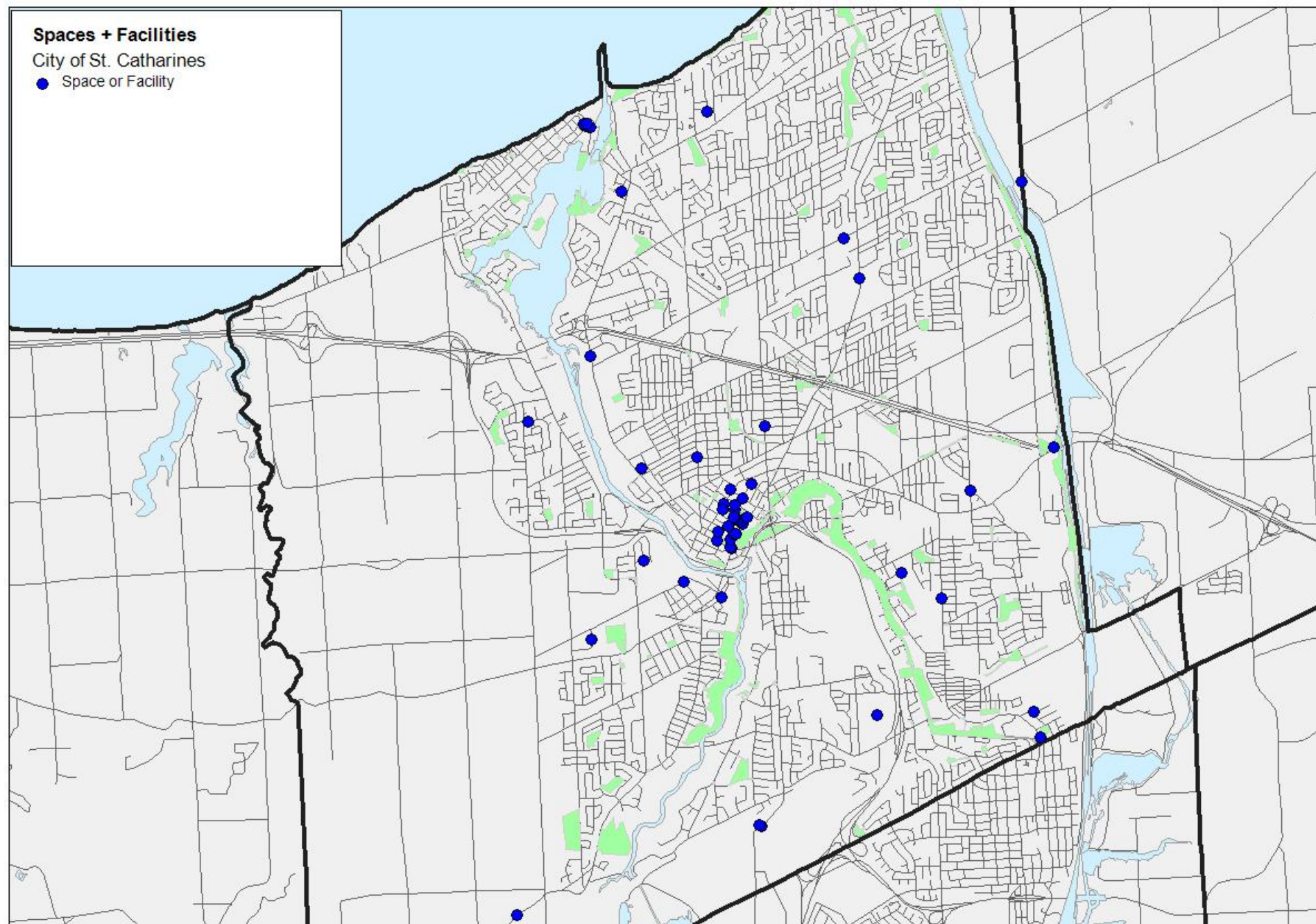
- Not surprisingly, facilities are clustered downtown.
- Limited activity around the university.



Spaces + Facilities

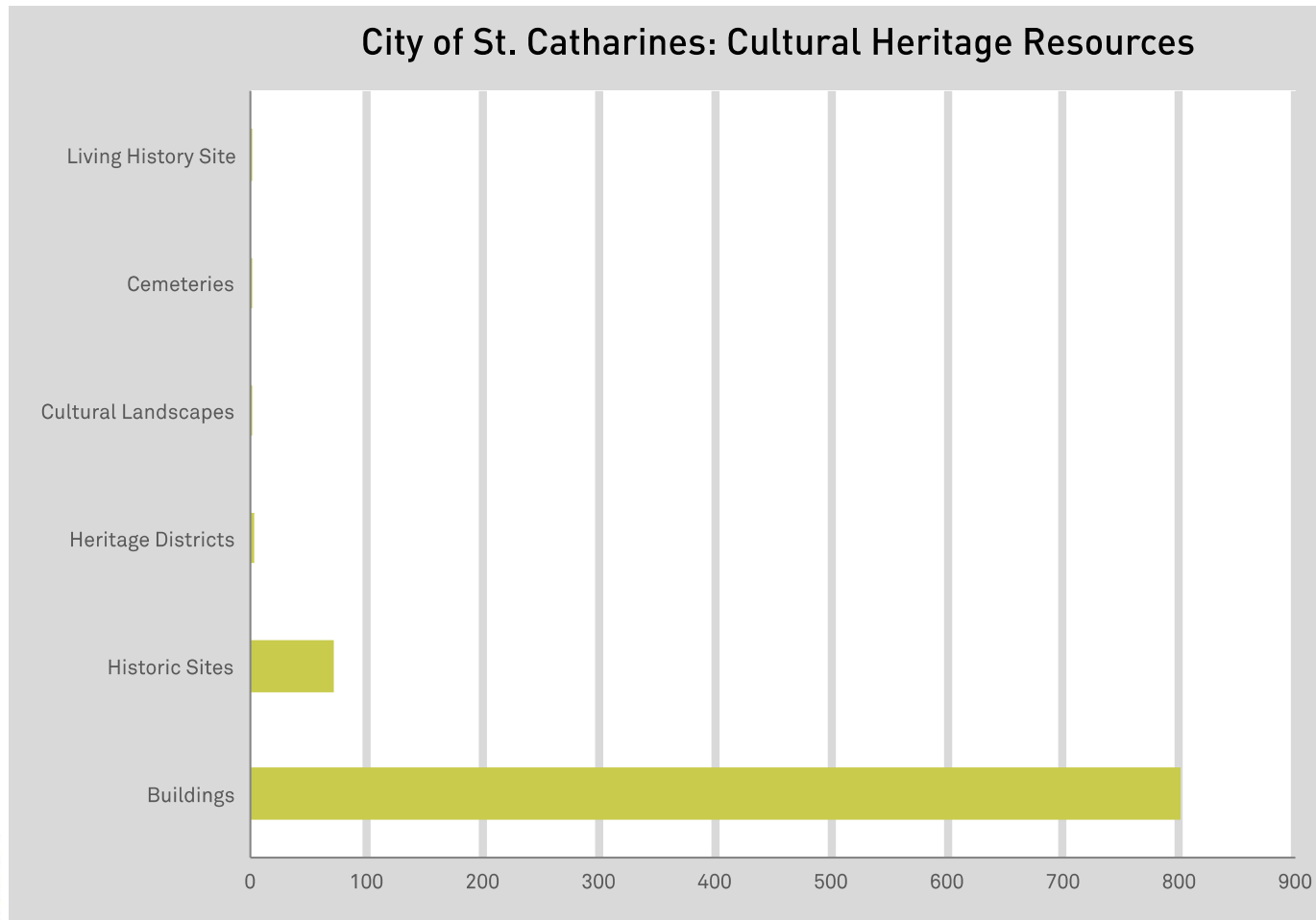
City of St. Catharines

● Space or Facility



5. Cultural Mapping & Demographic Analysis

Cultural Heritage Resources



- Huge number of historical buildings (800).
- Notable number of historic sites.

5. Cultural Mapping & Demographic Analysis

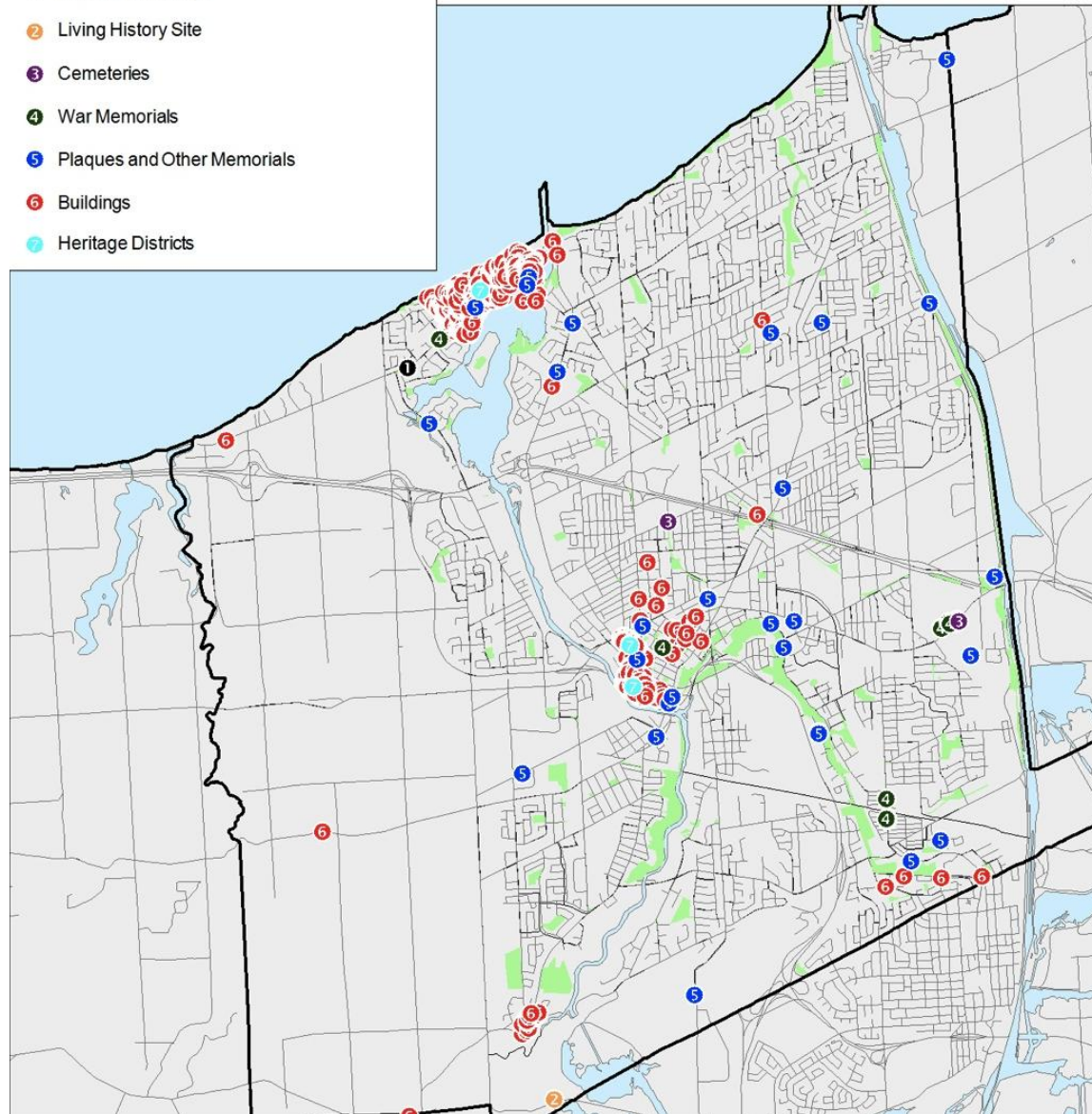
Cultural Heritage

- Not surprisingly, historic buildings are concentrated in heritage districts.

Cultural Heritage Sites + Districts

City of St. Catharines

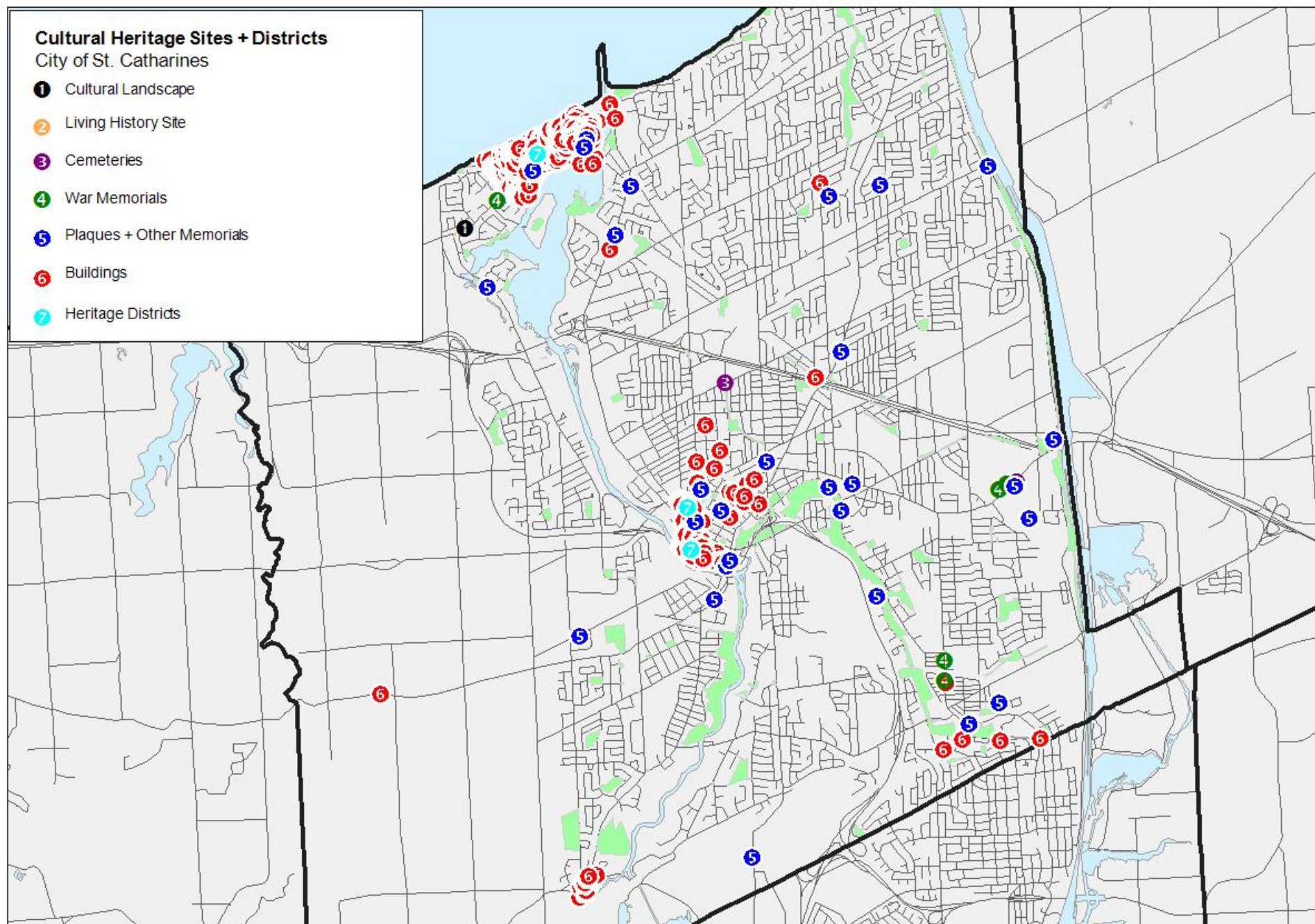
- ① Cultural Landscape
- ② Living History Site
- ③ Cemeteries
- ④ War Memorials
- ⑤ Plaques and Other Memorials
- ⑥ Buildings
- ⑦ Heritage Districts



Cultural Heritage Sites + Districts

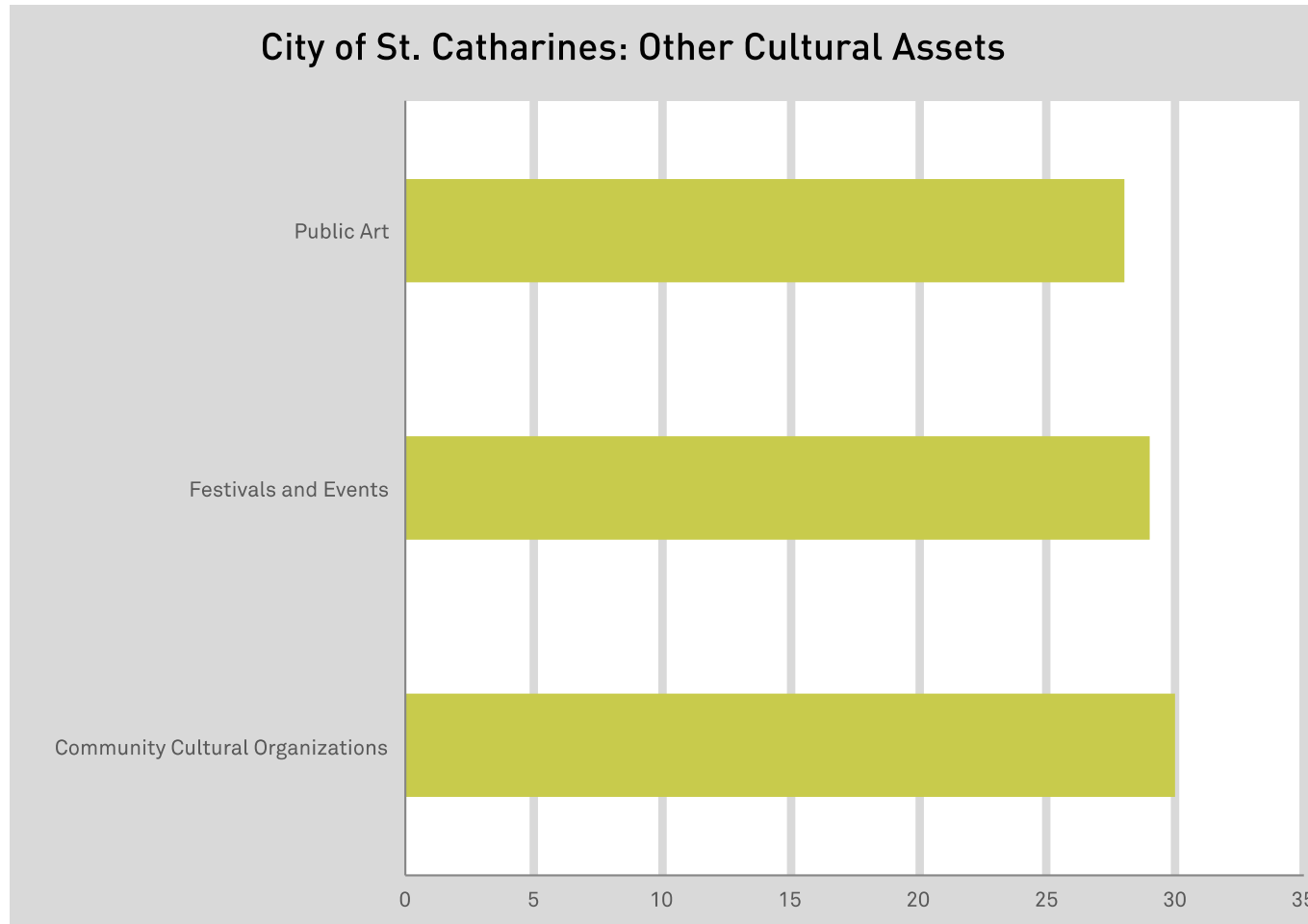
City of St. Catharines

- 1 Cultural Landscape
- 2 Living History Site
- 3 Cemeteries
- 4 War Memorials
- 5 Plaques + Other Memorials
- 6 Buildings
- 7 Heritage Districts



5. Cultural Mapping & Demographic Analysis

Other Cultural Assets

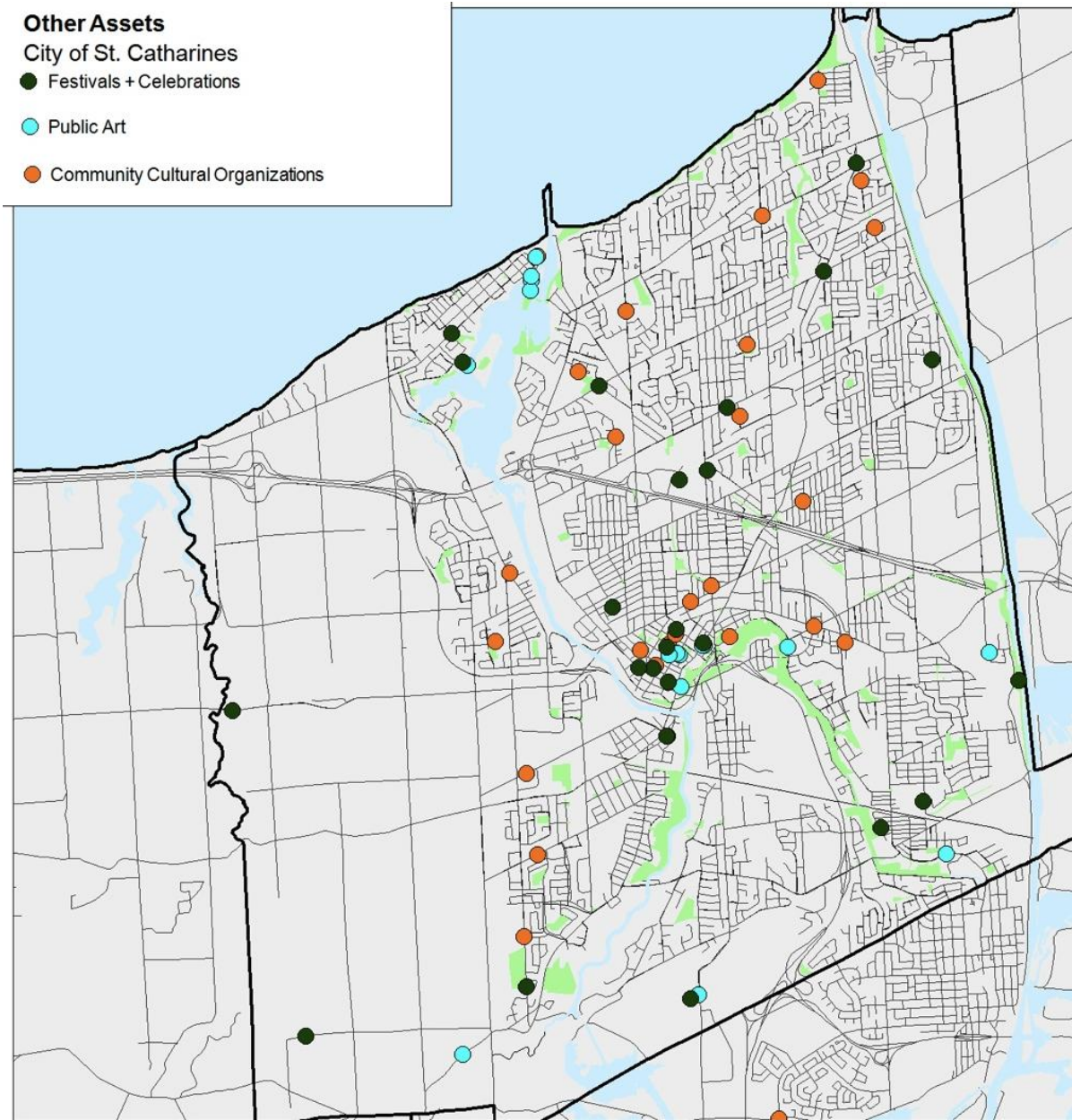


5. Cultural Mapping & Demographic Analysis

Other Assets

- Good and notable distribution pattern for community organizations and festivals.
- Some downtown concentration of all.
- Public Art geographically concentrated north, south and downtown(27 in all).

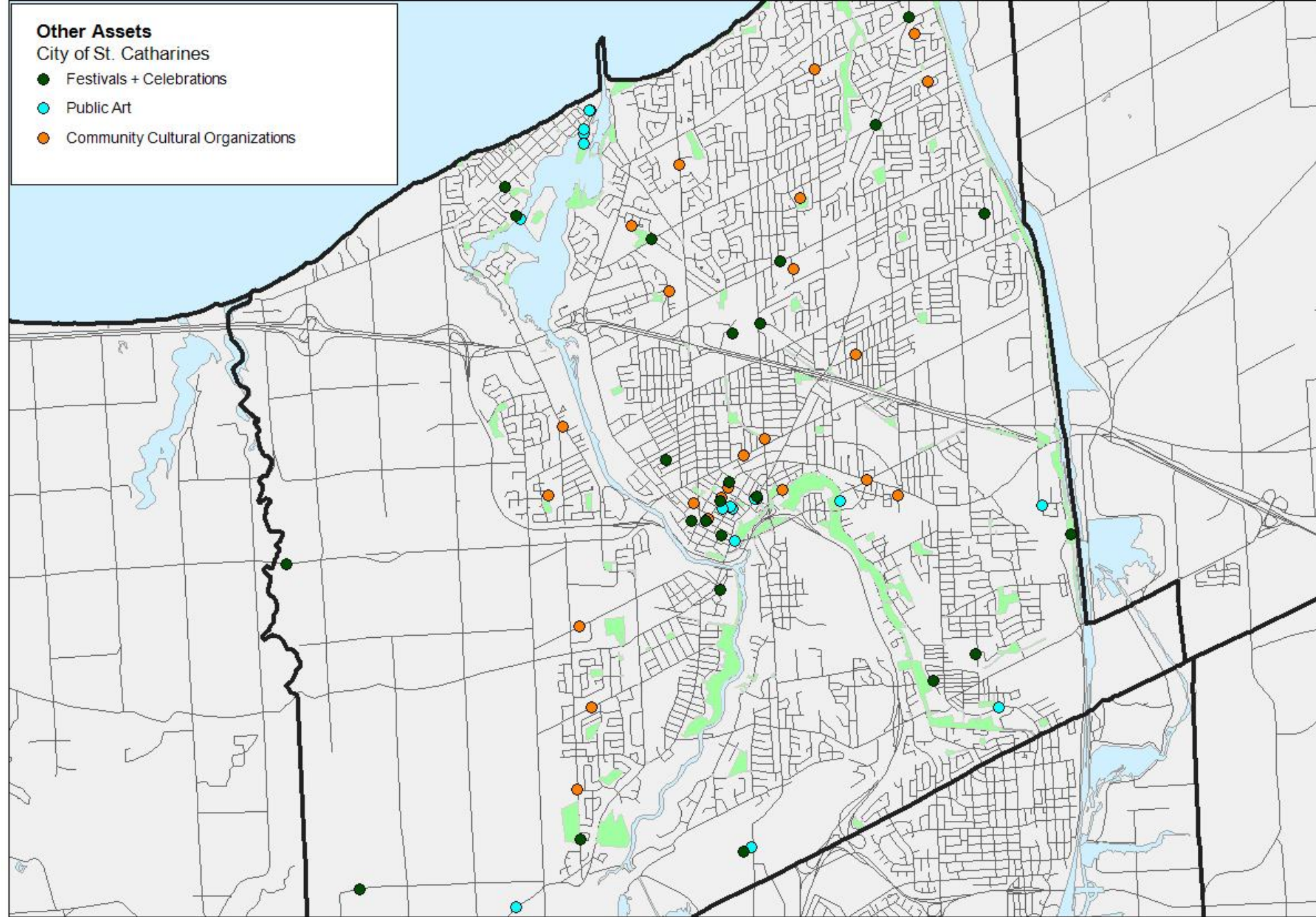
Other Assets
City of St. Catharines
● Festivals + Celebrations
● Public Art
● Community Cultural Organizations



Other Assets

City of St. Catharines

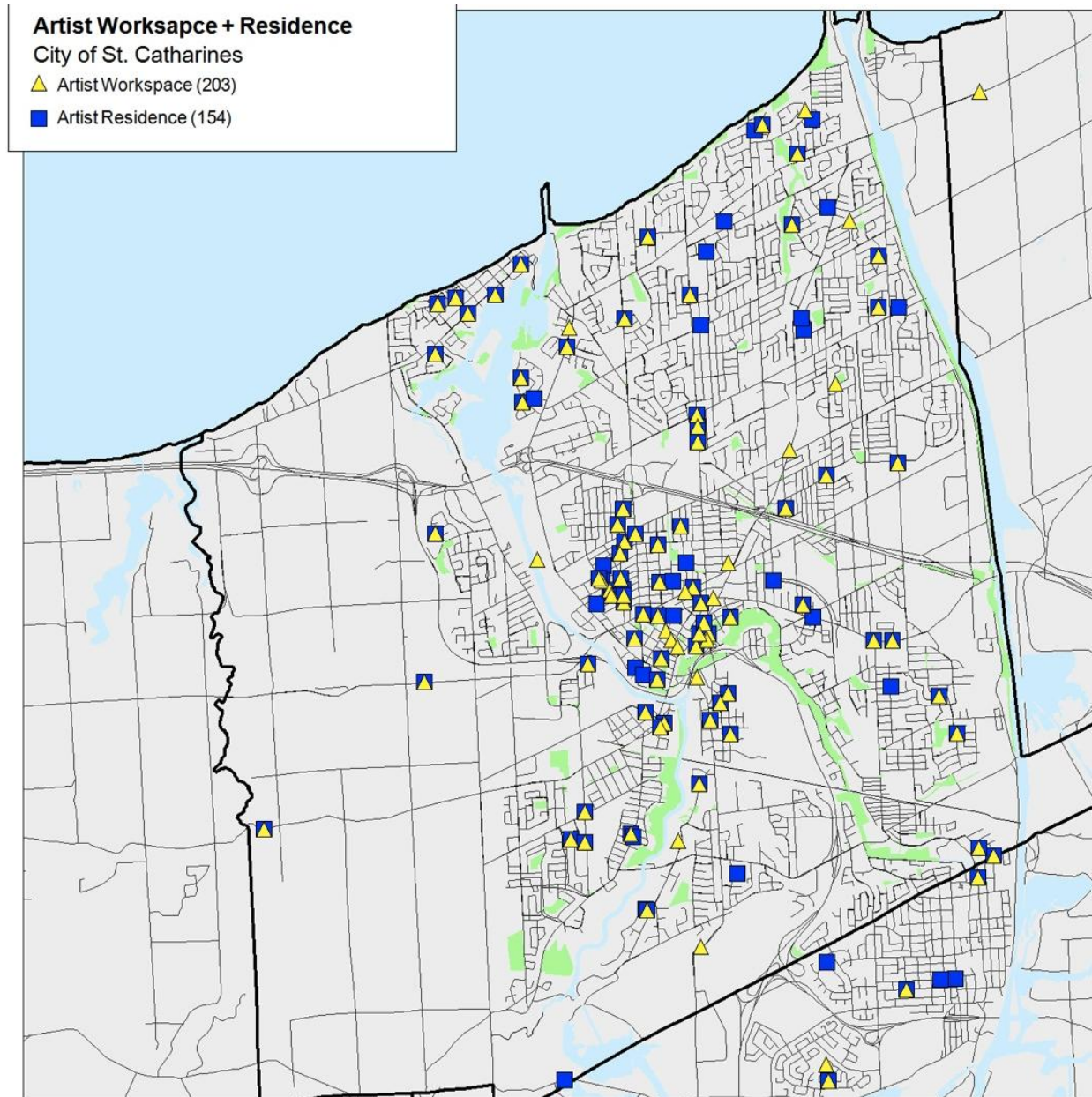
- Festivals + Celebrations
- Public Art
- Community Cultural Organizations



5. Cultural Mapping & Demographic Analysis

Artist Workspace + Residence

- Artists are working more than living downtown.
- Source: Survey data.

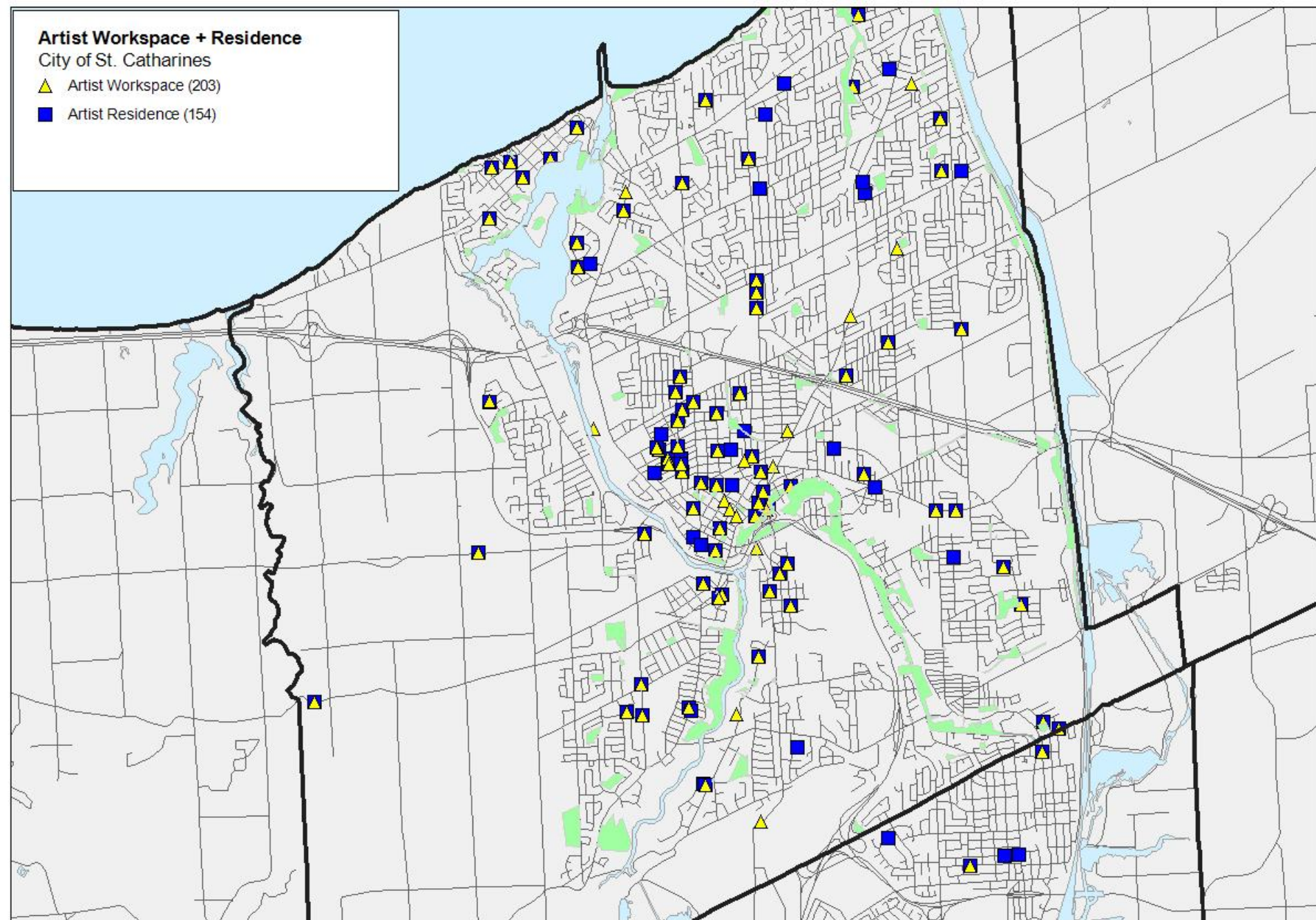


Artist Workspace + Residence

City of St. Catharines

▲ Artist Workspace (203)

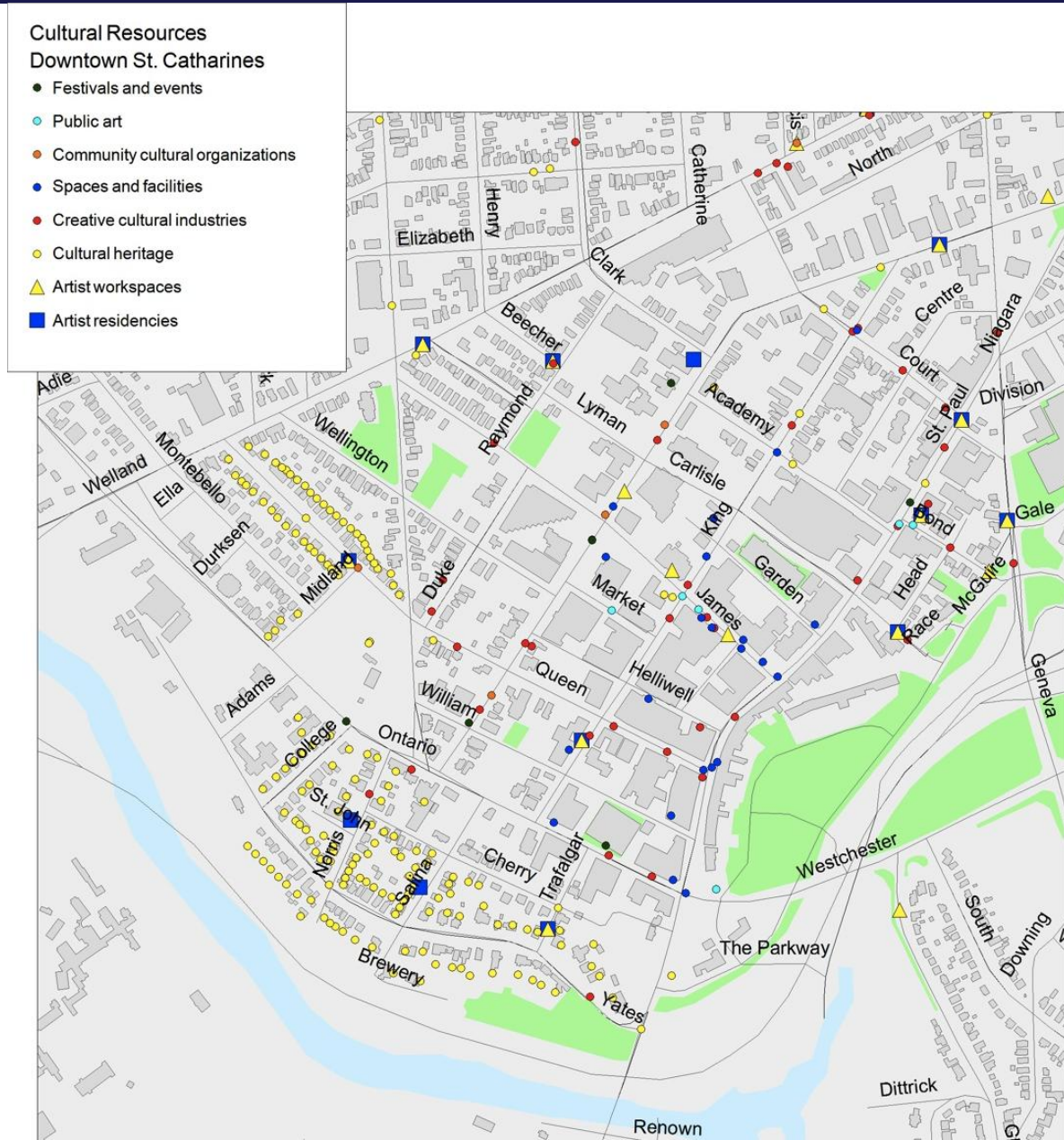
■ Artist Residence (154)



5. Cultural Mapping & Demographic Analysis

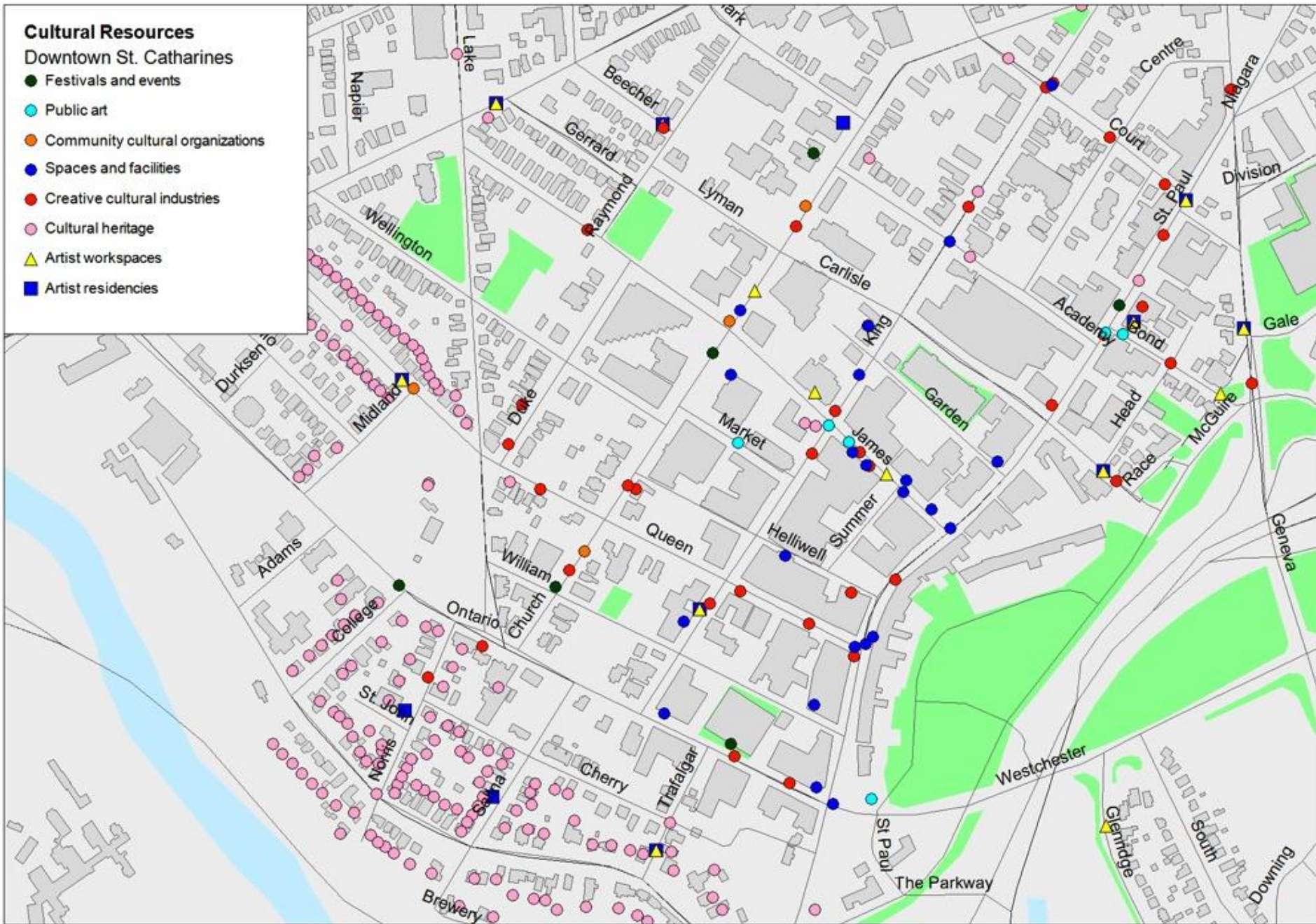
Downtown

- The Performing Arts Centre will be located at St. Paul and Carlisle.
- Existing assets are clustered on James St, St Paul, riverfront.
- Placement of existing assets makes them well-positioned to leverage the economic impact of the PAC.
- Clusters of heritage assets are notable.



Cultural Resources Downtown St. Catharines

- Festivals and events
- Public art
- Community cultural organizations
- Spaces and facilities
- Creative cultural industries
- Cultural heritage
- ▲ Artist workspaces
- Artist residencies

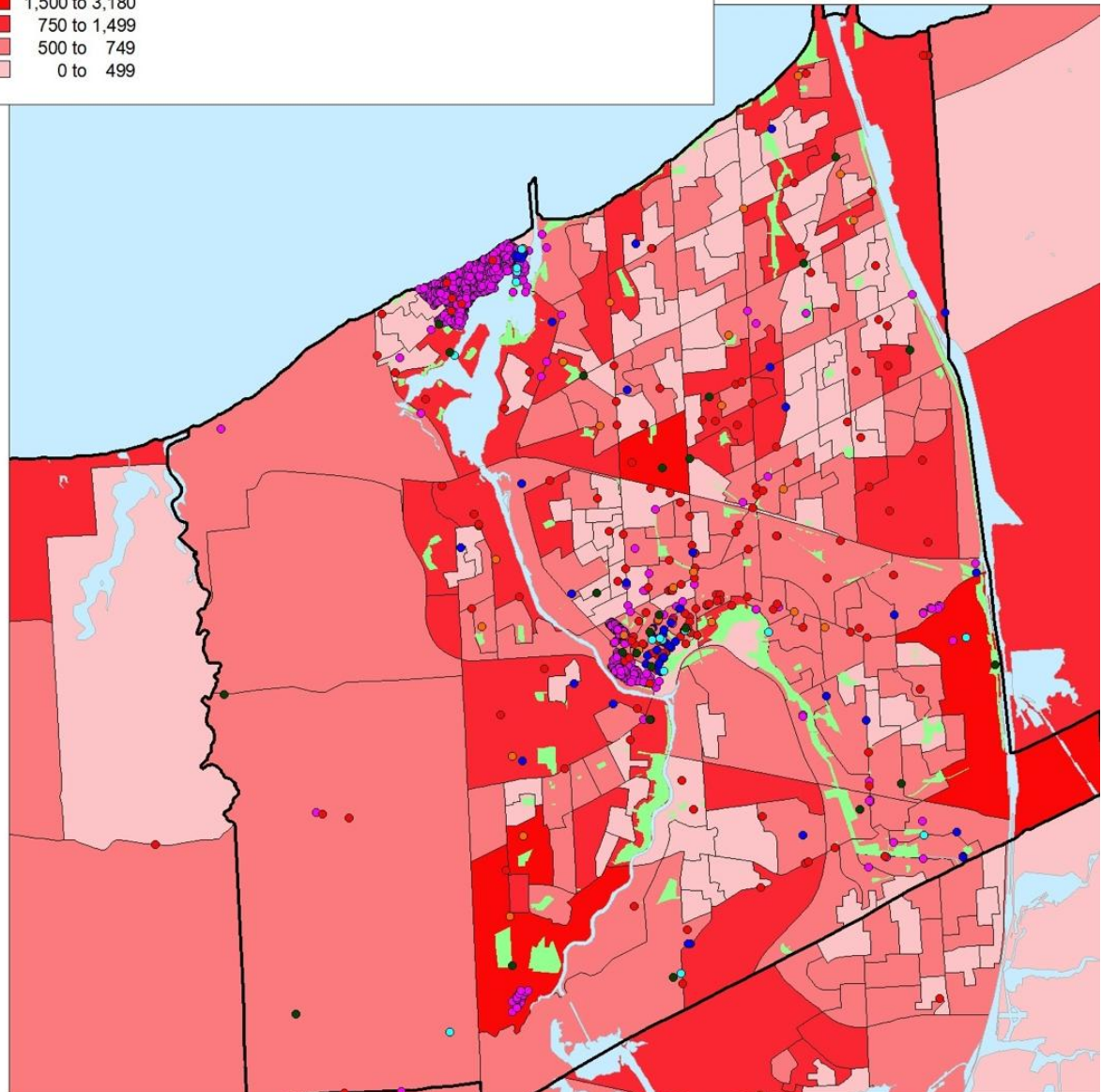
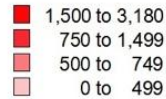


5. Cultural Mapping & Demographic Analysis

Demographic Analysis

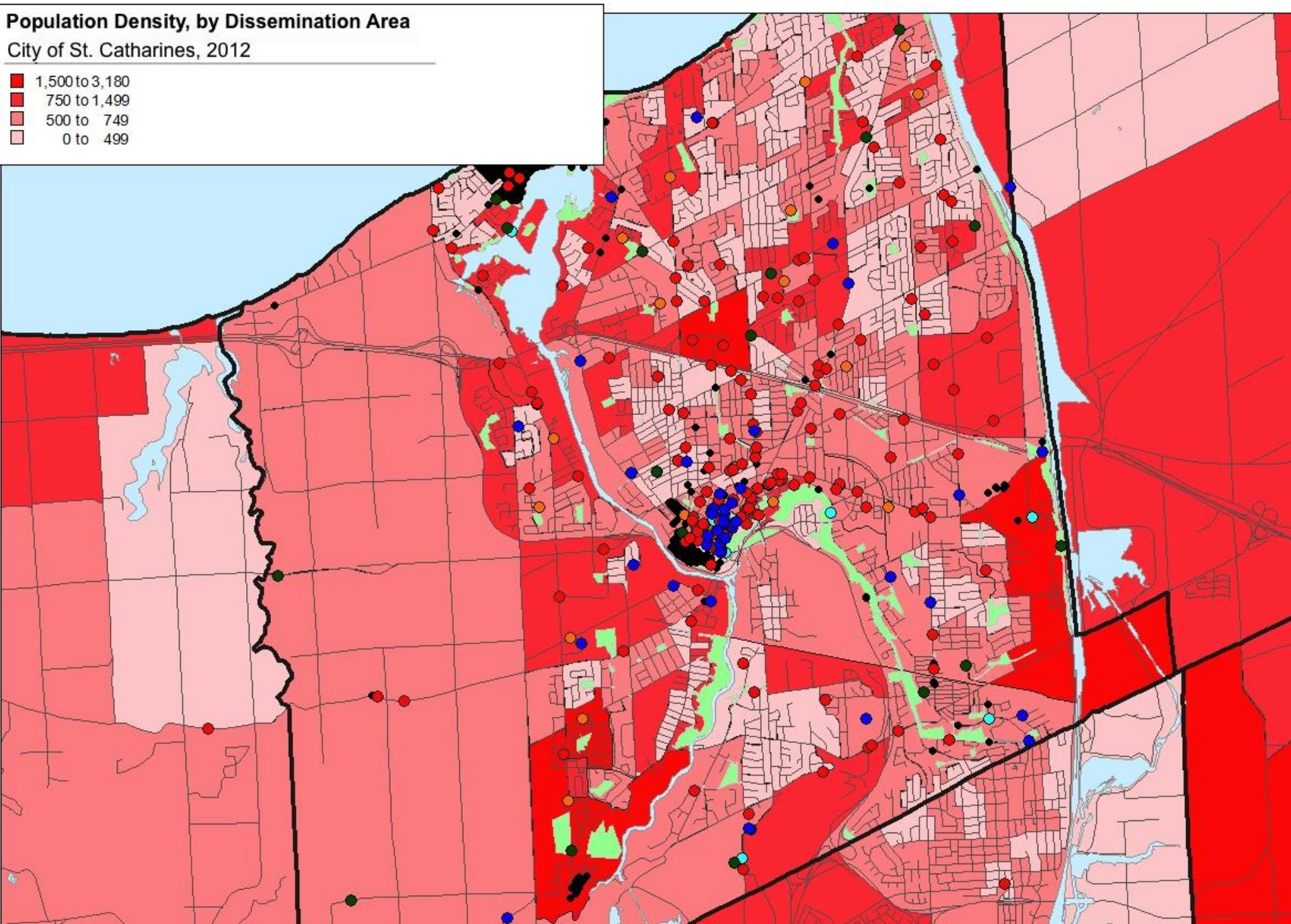
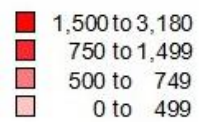
- Population density downtown is lower but concentration of cultural assets is higher.
- Significant populations must travel downtown for cultural experiences.

Population Density, by Dissemination Area
City of St. Catharines, 2012



Population Density, by Dissemination Area

City of St. Catharines, 2012

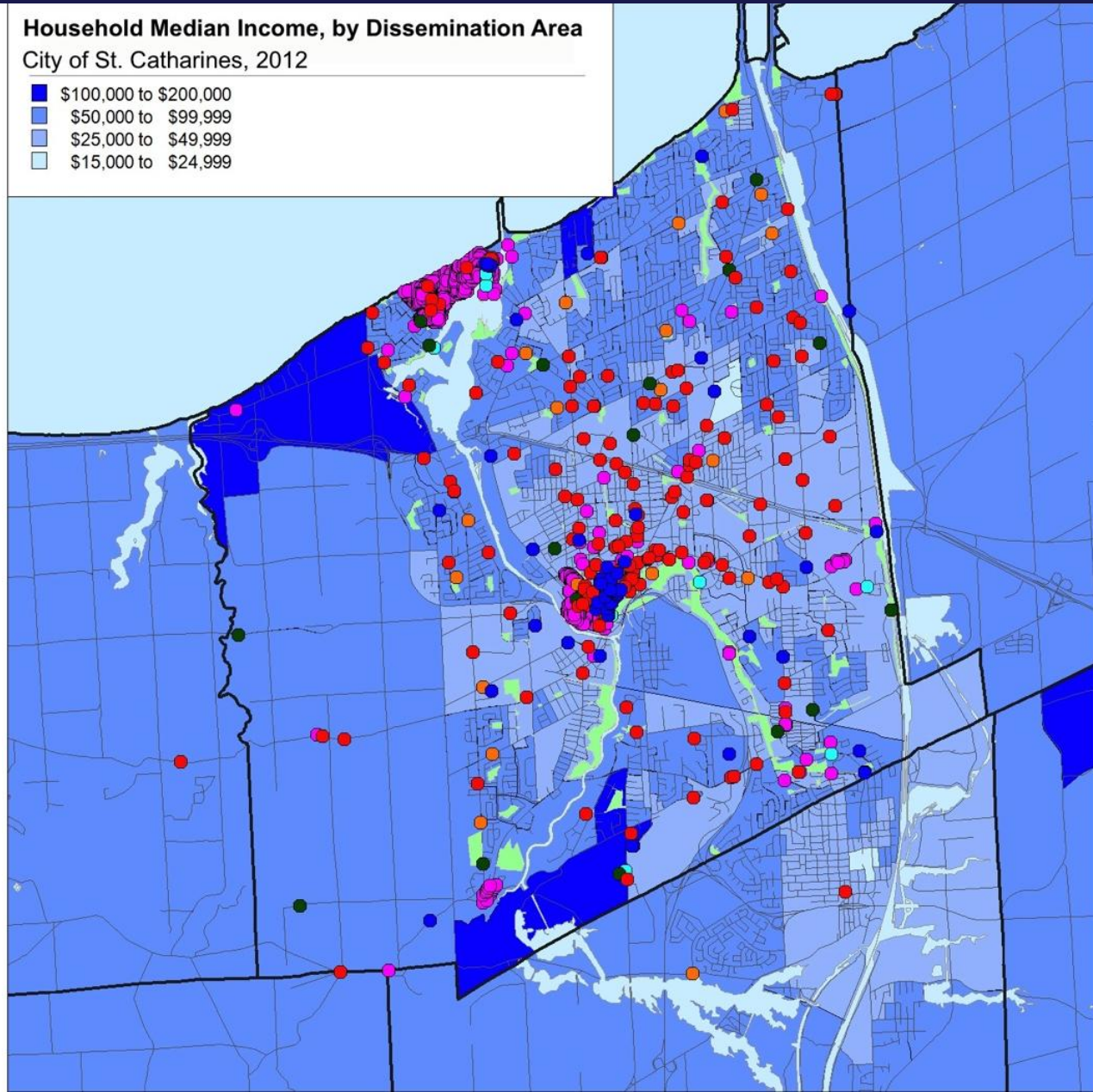
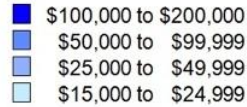


5. Cultural Mapping & Demographic Analysis

Demographic Analysis

- Two pockets of affluence are evident, one on the water and one near the university

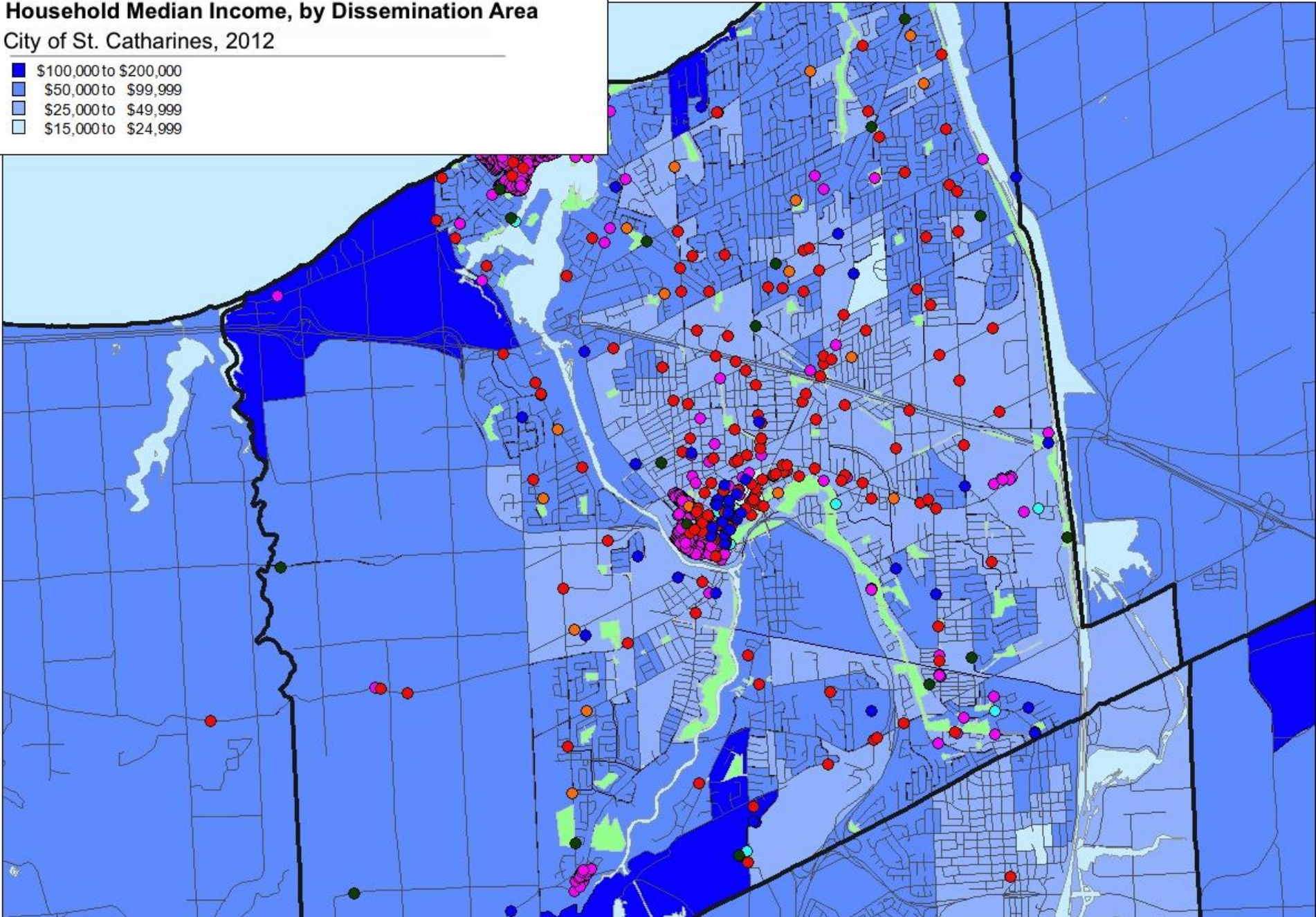
Household Median Income, by Dissemination Area
City of St. Catharines, 2012



Household Median Income, by Dissemination Area

City of St. Catharines, 2012

- \$100,000 to \$200,000
- \$50,000 to \$99,999
- \$25,000 to \$49,999
- \$15,000 to \$24,999

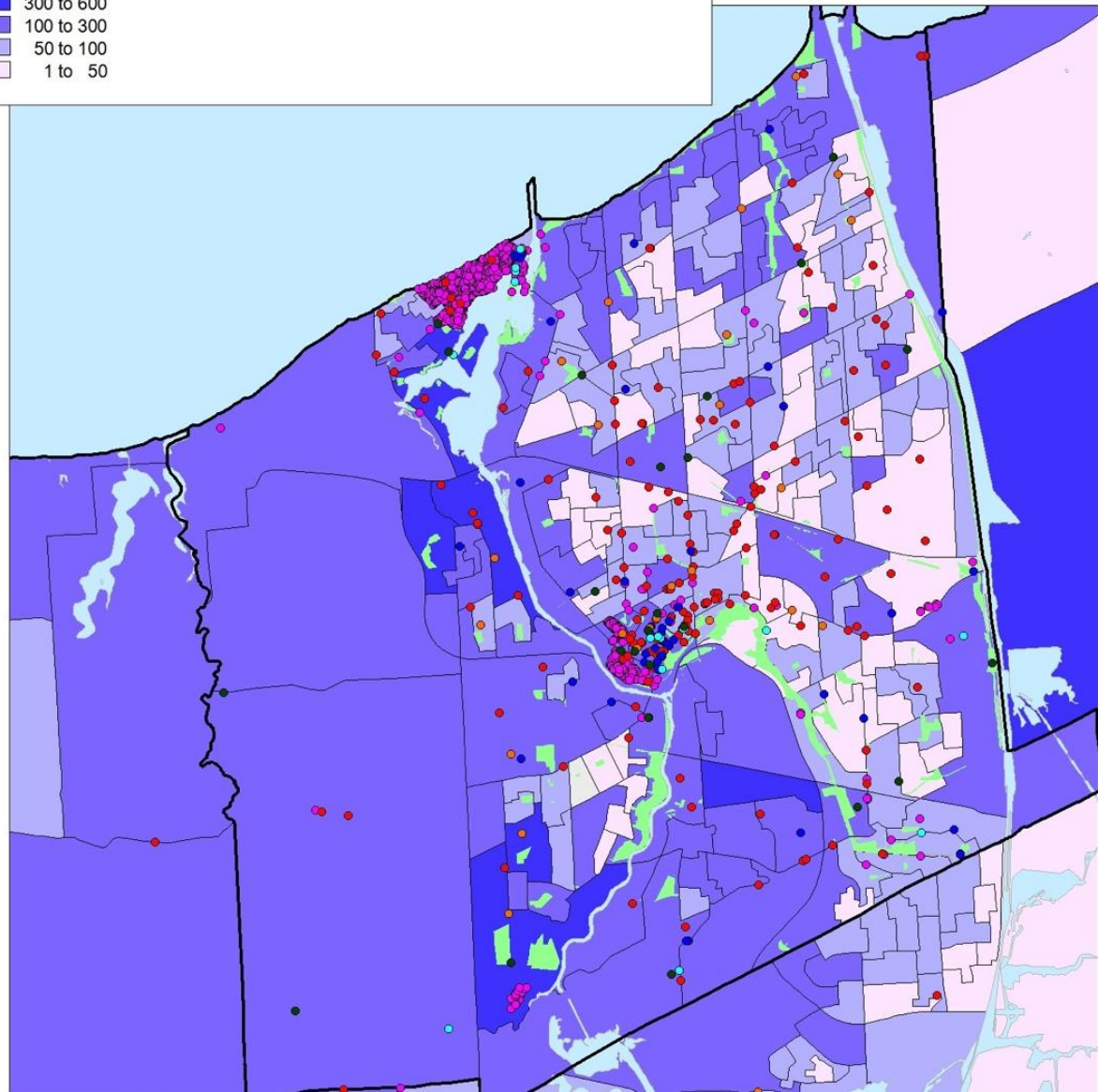
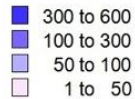


5. Cultural Mapping & Demographic Analysis

Demographic Analysis

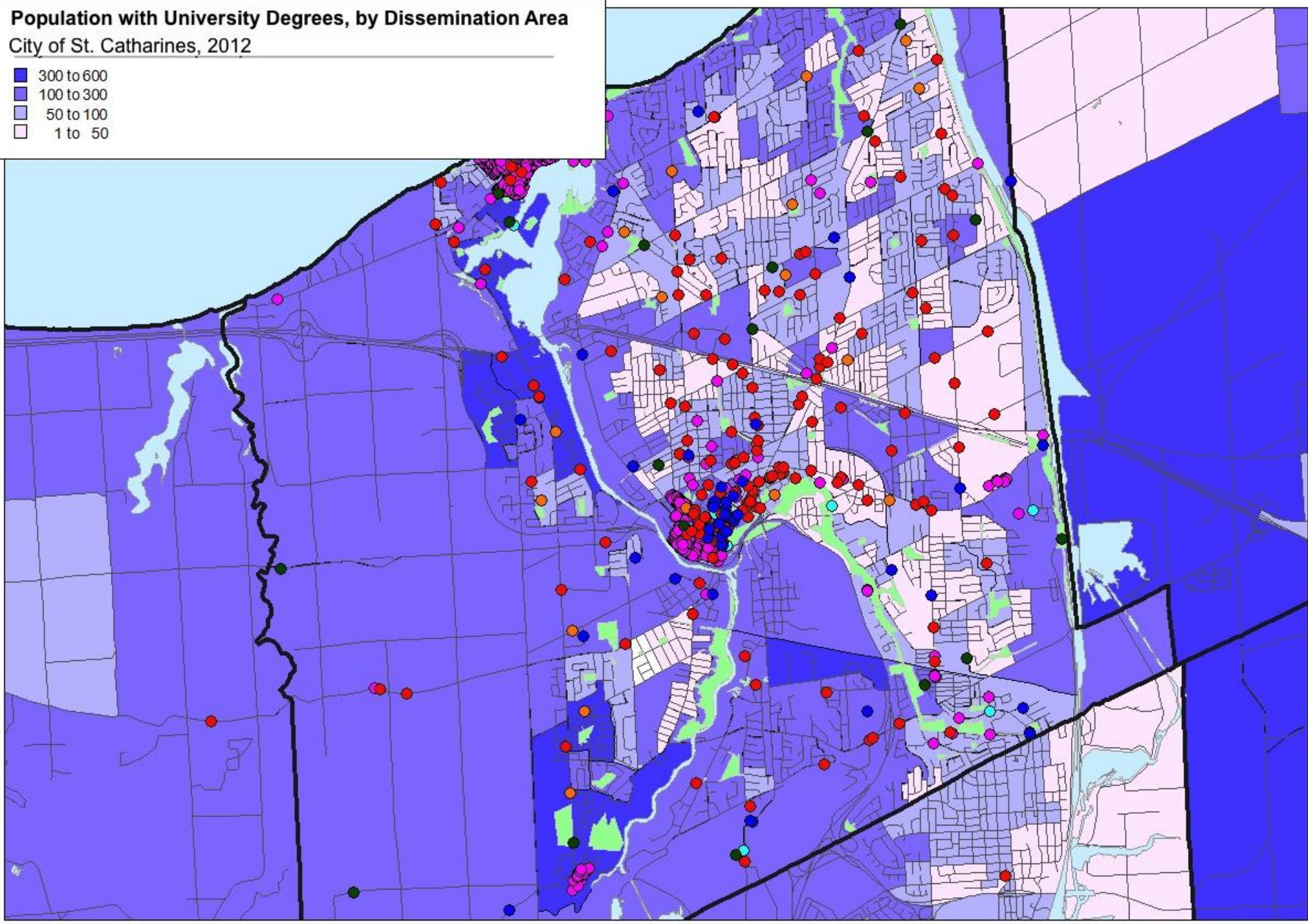
- Highest concentrations of educational attainment are located on the outskirts of the City.

Population with University Degrees, by Dissemination Area
City of St. Catharines, 2012



Population with University Degrees, by Dissemination Area
City of St. Catharines, 2012

- 300 to 600
- 100 to 300
- 50 to 100
- 1 to 50

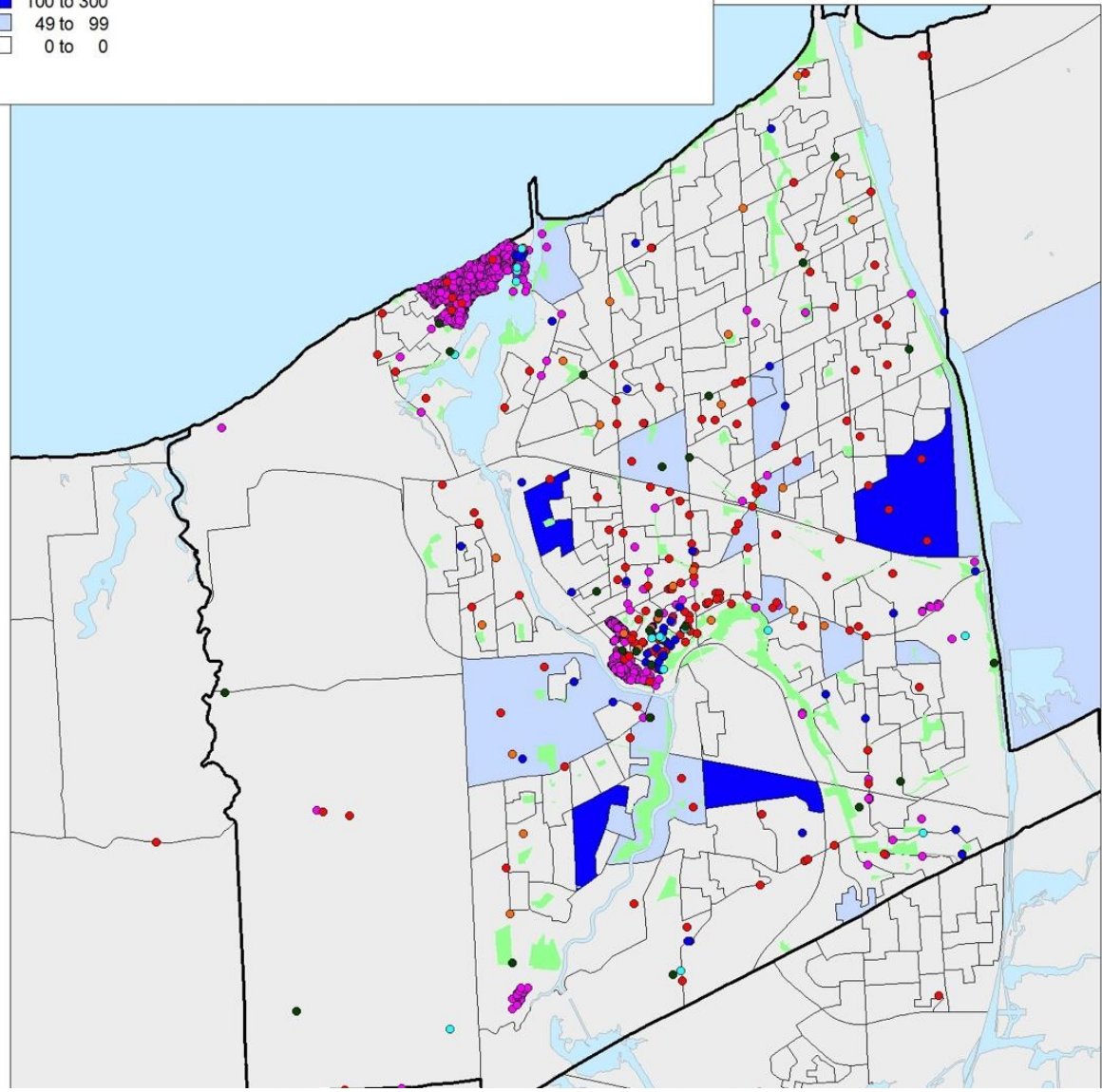


5. Cultural Mapping & Demographic Analysis

Demographic Analysis

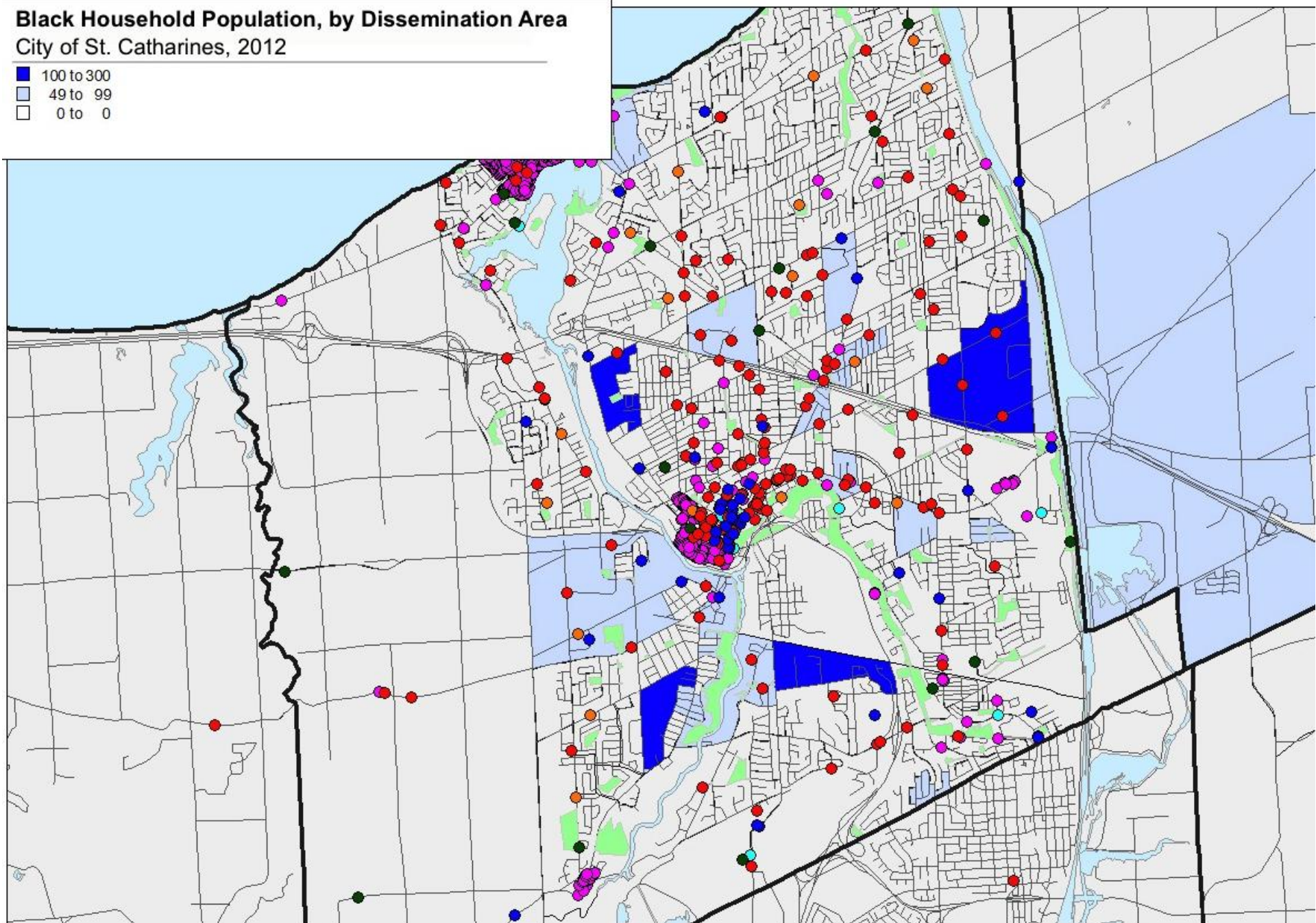
- Few identified assets in areas with highest concentrations of Black residents.

Black Household Population, by Dissemination Area
City of St. Catharines, 2012



Black Household Population, by Dissemination Area
City of St. Catharines, 2012

- 100 to 300
- 49 to 99
- 0 to 0

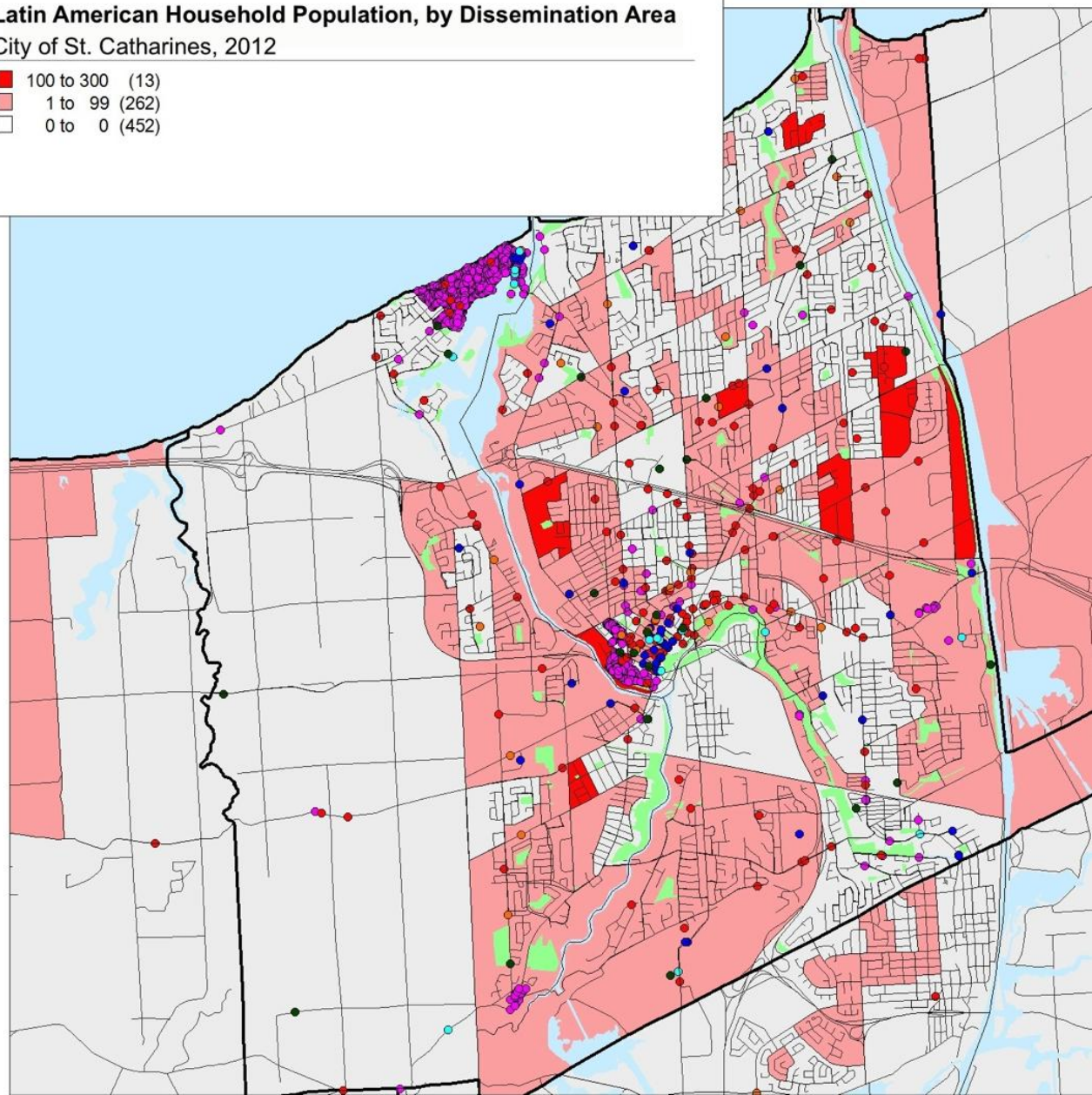
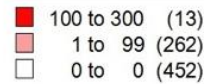


5. Cultural Mapping & Demographic Analysis

Demographic Analysis

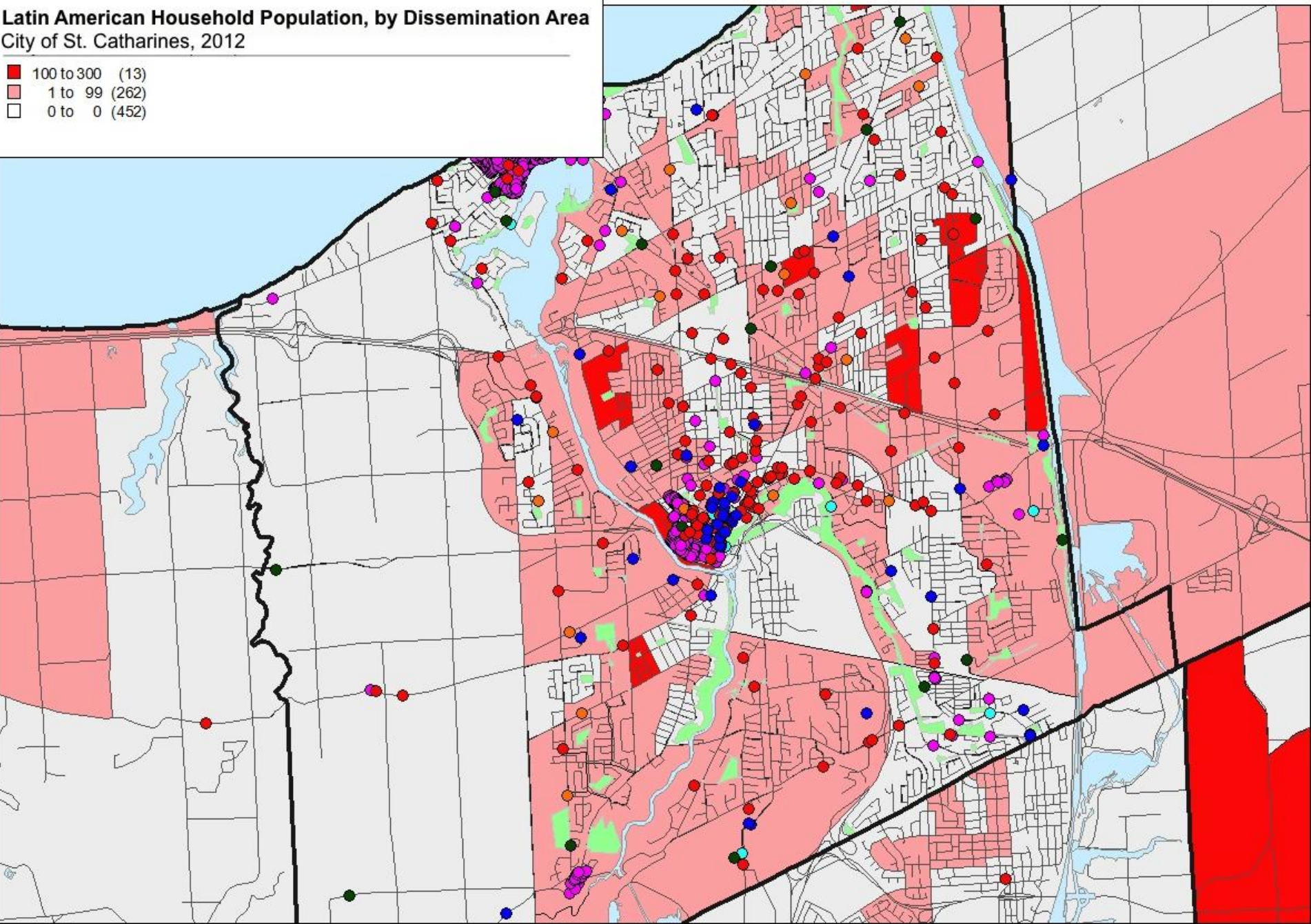
- Few identified assets in areas with highest concentrations of Latino residents.

Latin American Household Population, by Dissemination Area
City of St. Catharines, 2012



Latin American Household Population, by Dissemination Area
City of St. Catharines, 2012

- 100 to 300 (13)
- 1 to 99 (262)
- 0 to 0 (452)

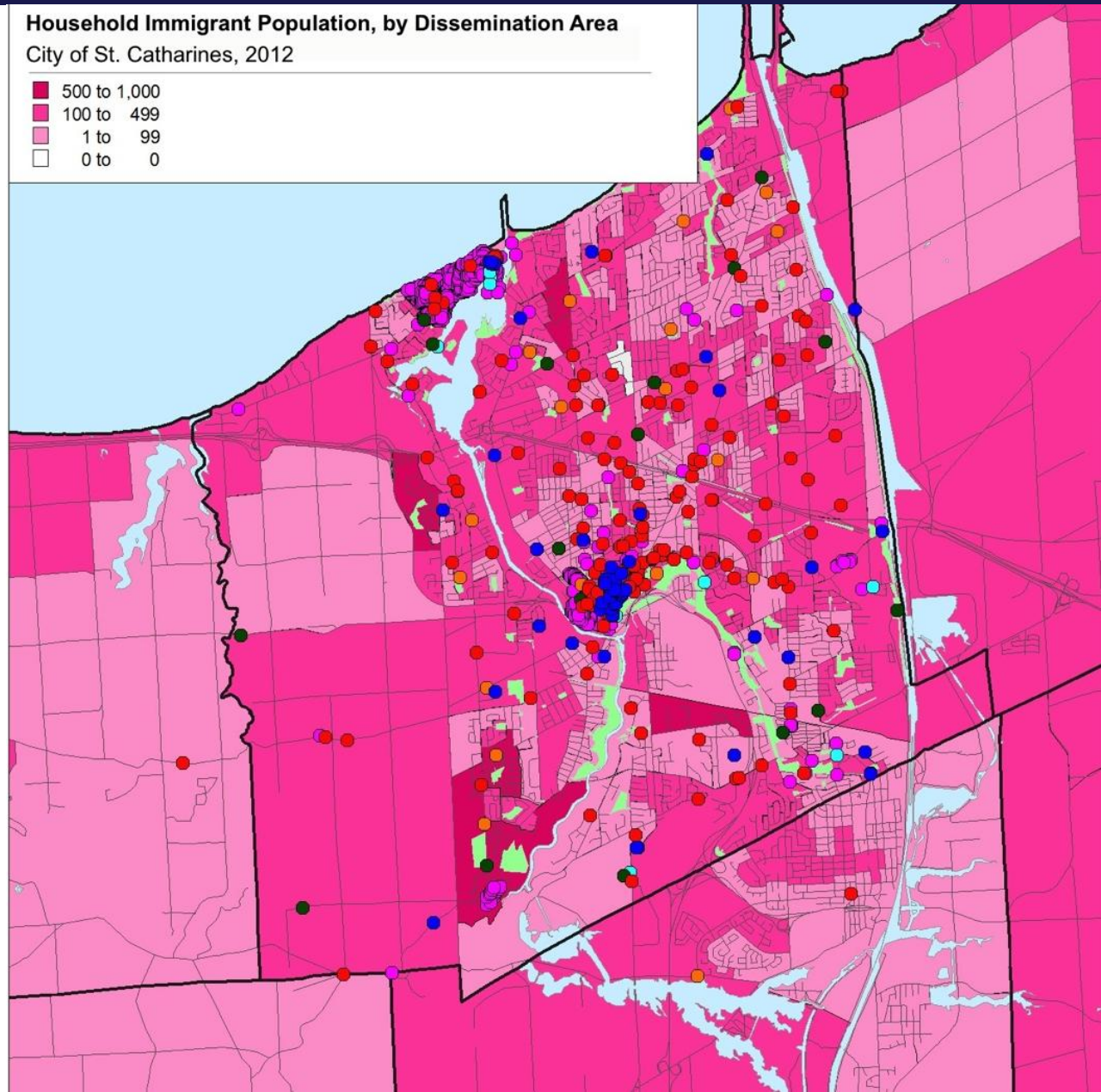
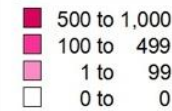


5. Cultural Mapping & Demographic Analysis

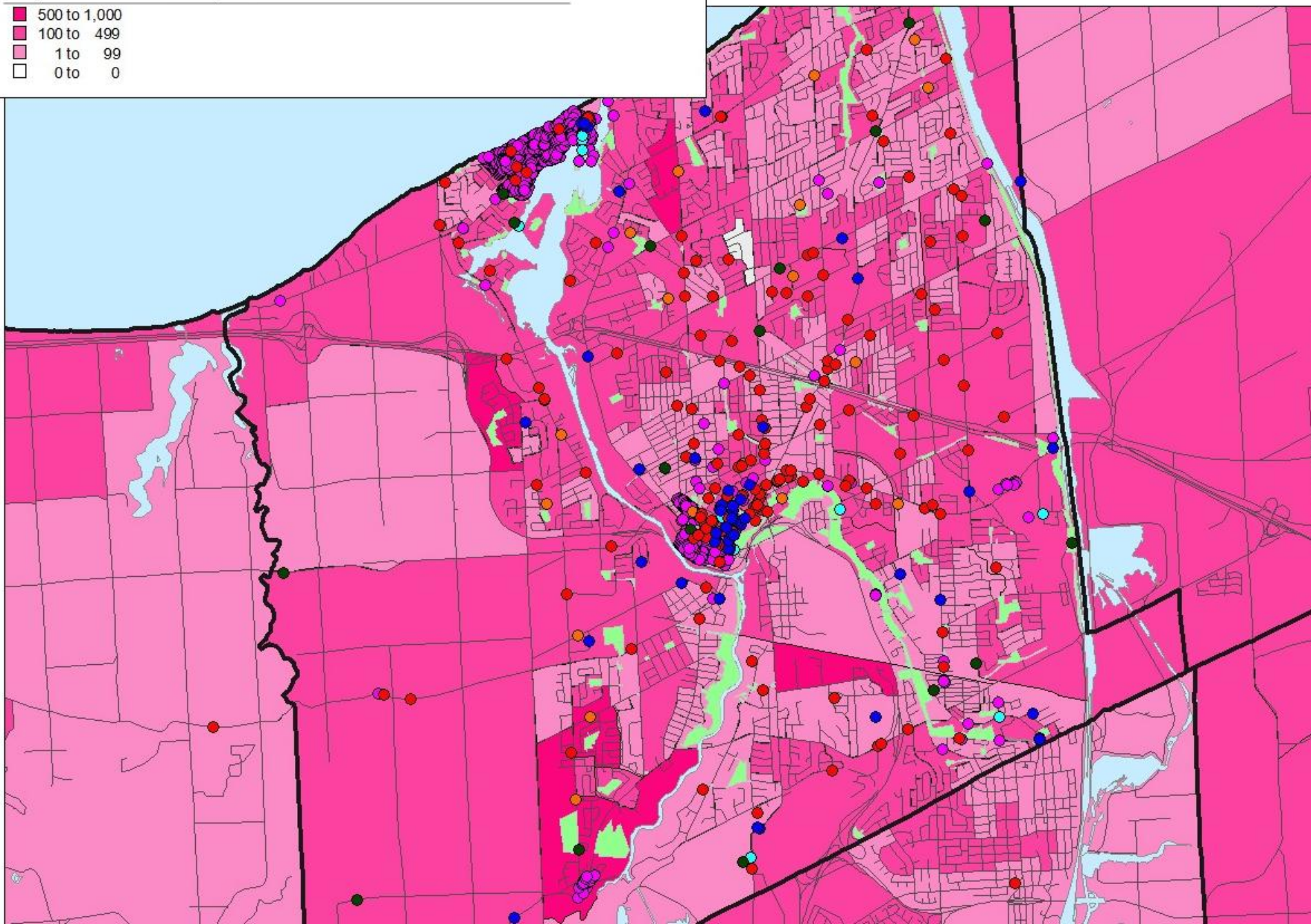
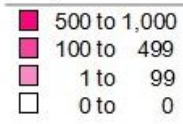
Demographic Analysis

- Population surrounding the University is well-educated and benefits from concentration of immigrants.
- Immigrant populations are less likely to travel downtown for arts programs, more likely to participate at home, church or within their neighborhood community.
- Highly educated immigrant populations are more likely to be interested in other culturally-specific programming.

Household Immigrant Population, by Dissemination Area
City of St. Catharines, 2012



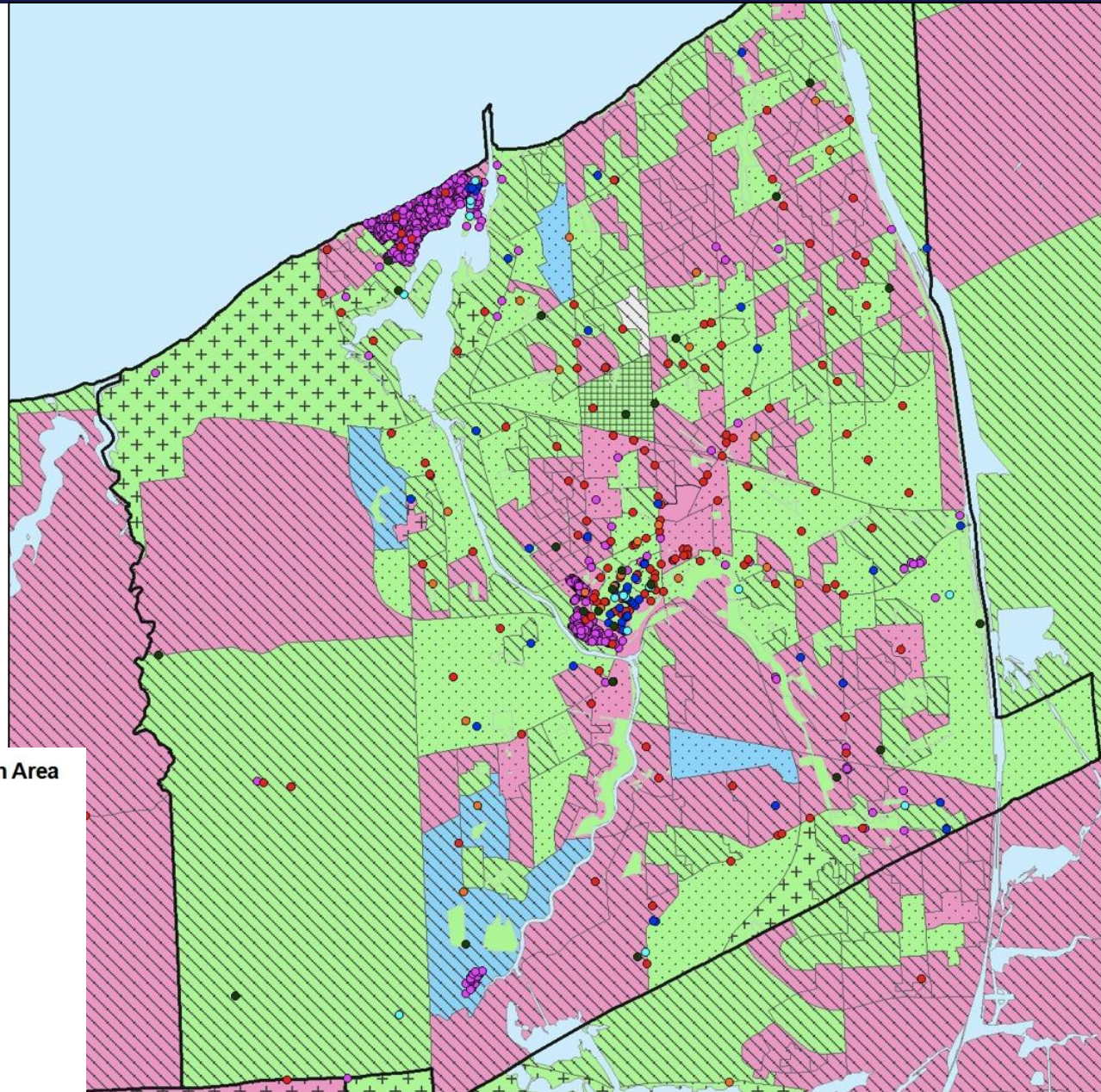
Household Immigrant Population, by Dissemination Area
City of St. Catharines, 2012



5. Cultural Mapping & Demographic Analysis

Demographic Analysis

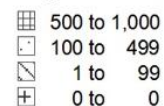
- Some of the areas with highest concentrations of immigrant populations also have more low income households

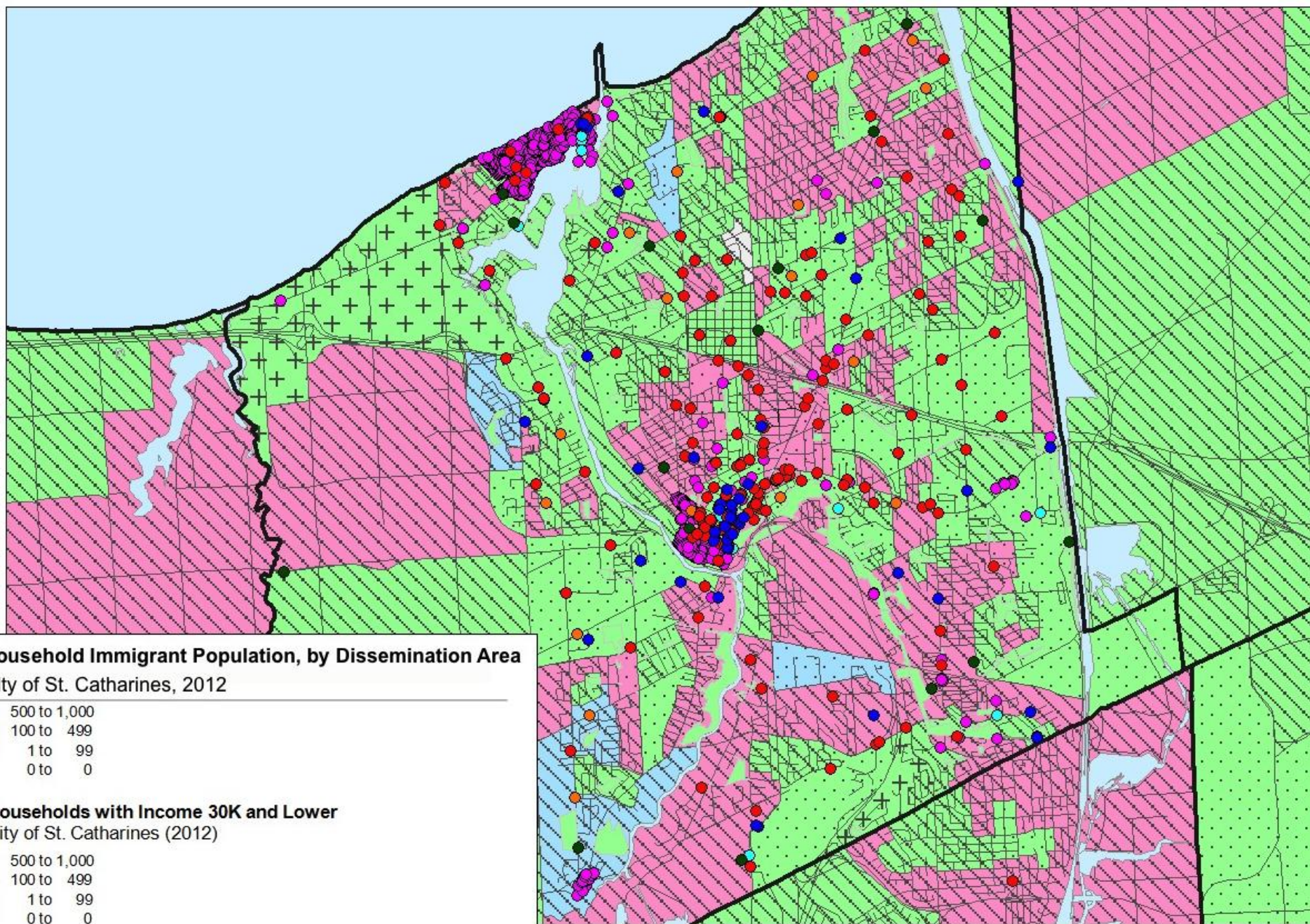


Household Immigrant Population, by Dissemination Area
City of St. Catharines (2012)



Households with Income 30K and Lower
City of St. Catharines (2012)



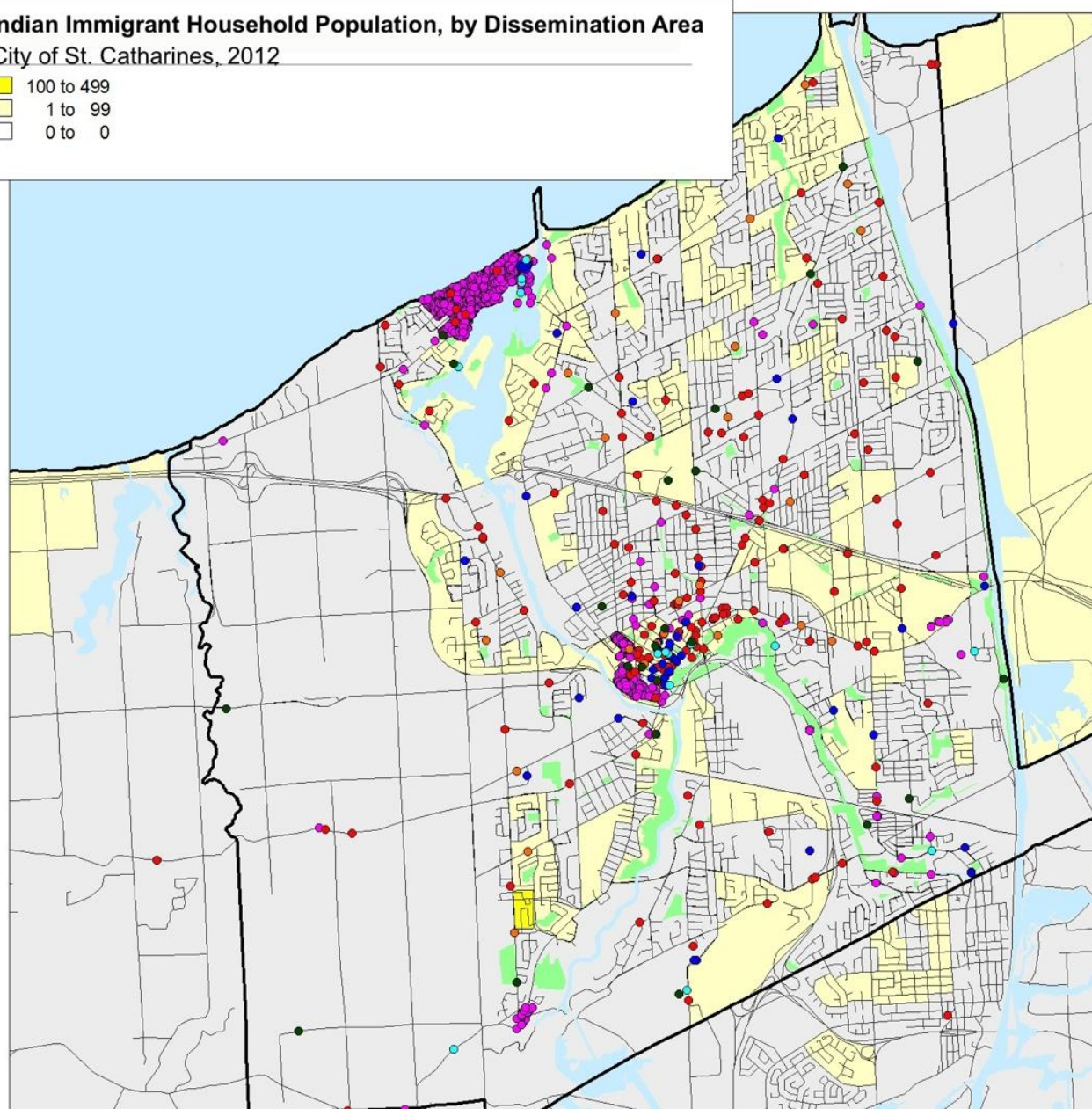
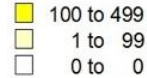


5. Cultural Mapping & Demographic Analysis

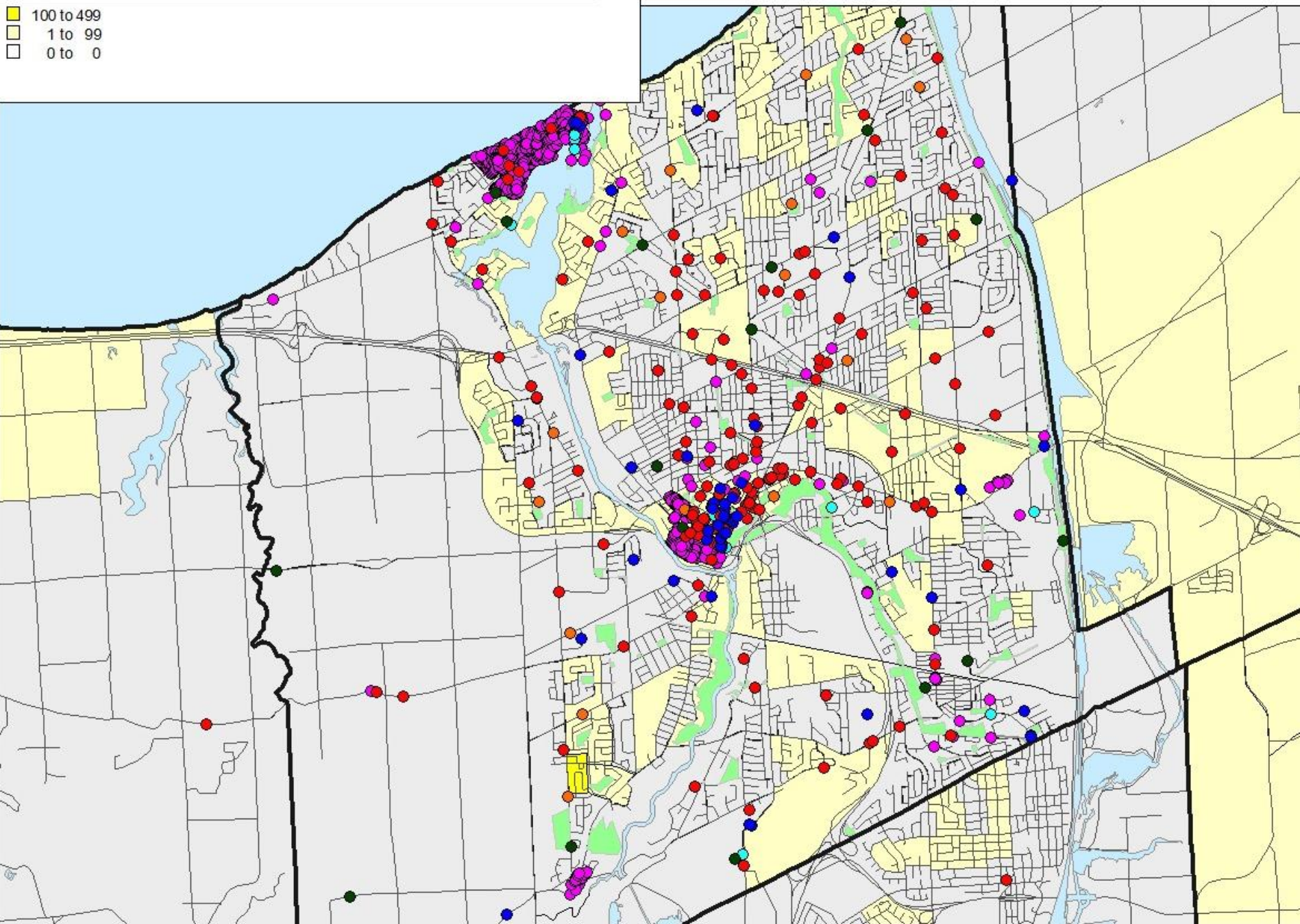
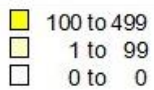
Demographic Analysis

- There is a small but concentrated Indian community located in southwest St. Catharines.

Indian Immigrant Household Population, by Dissemination Area
City of St. Catharines, 2012



Indian Immigrant Household Population, by Dissemination Area City of St. Catharines, 2012

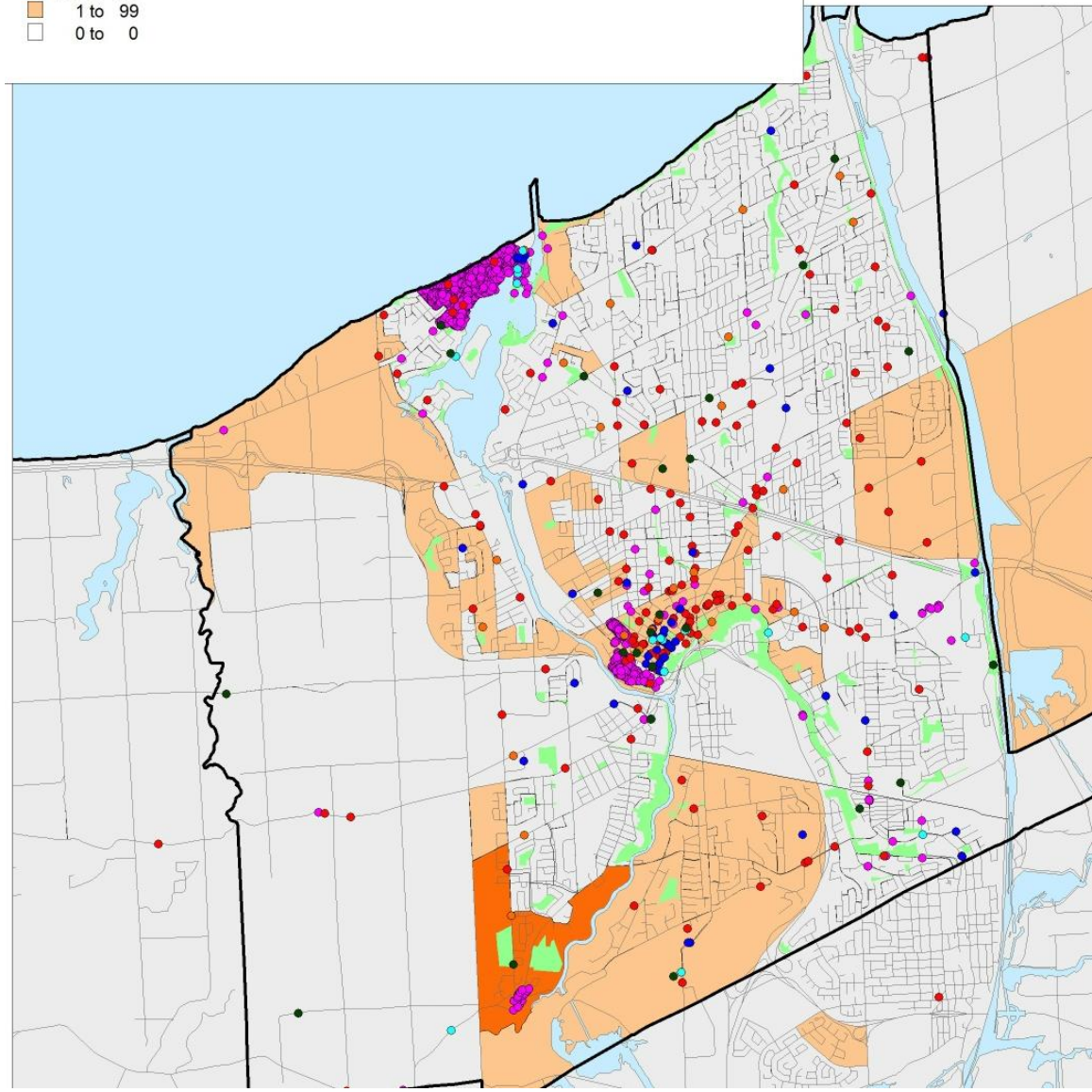


5. Cultural Mapping & Demographic Analysis

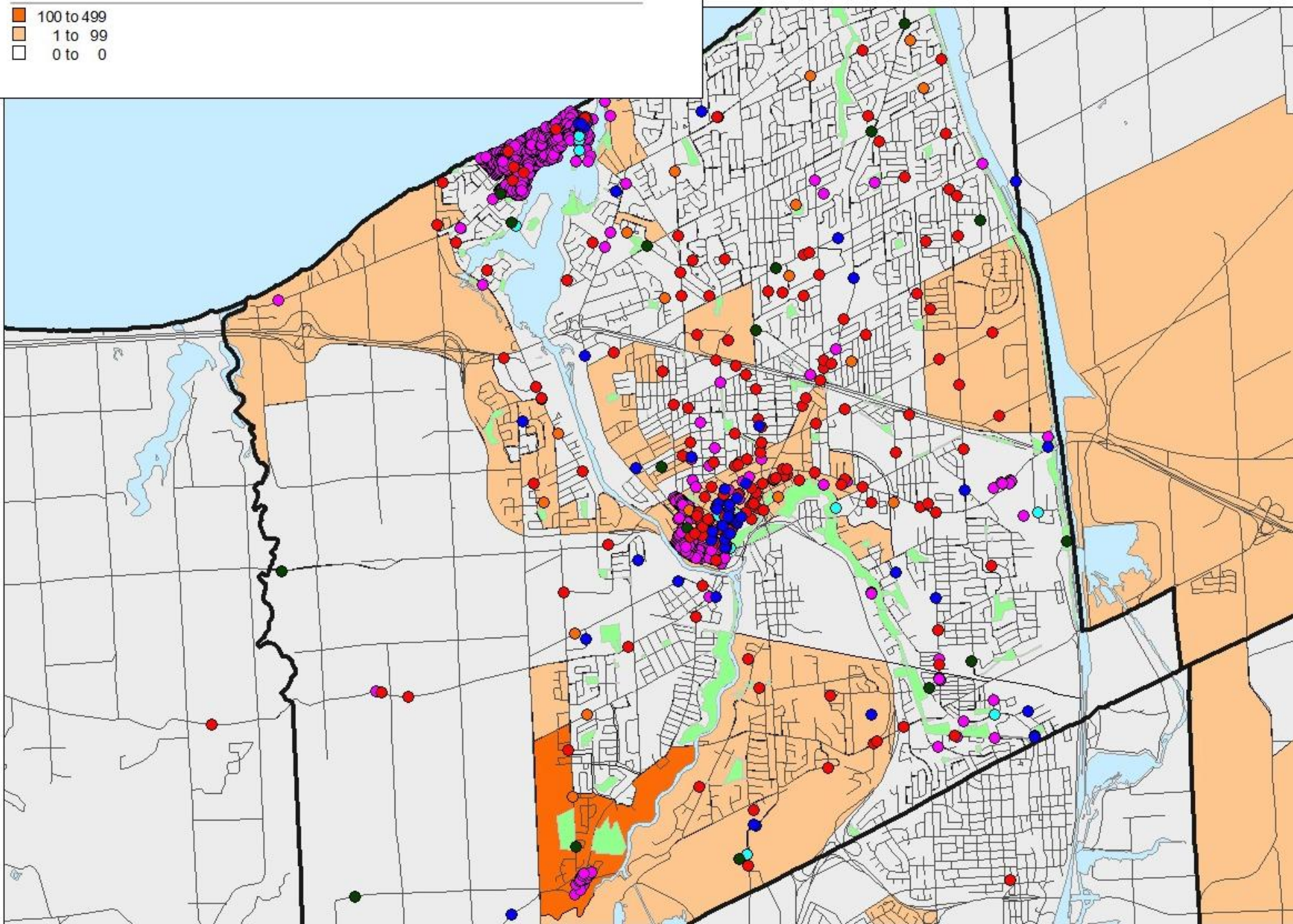
Demographic Analysis

- There is also a small but concentrated Pakistani community located in southwest St. Catharines.

Pakistani Immigrant Household Population, by Dissemination Area
City of St. Catharines, 2012



City of St. Catharines, 2012



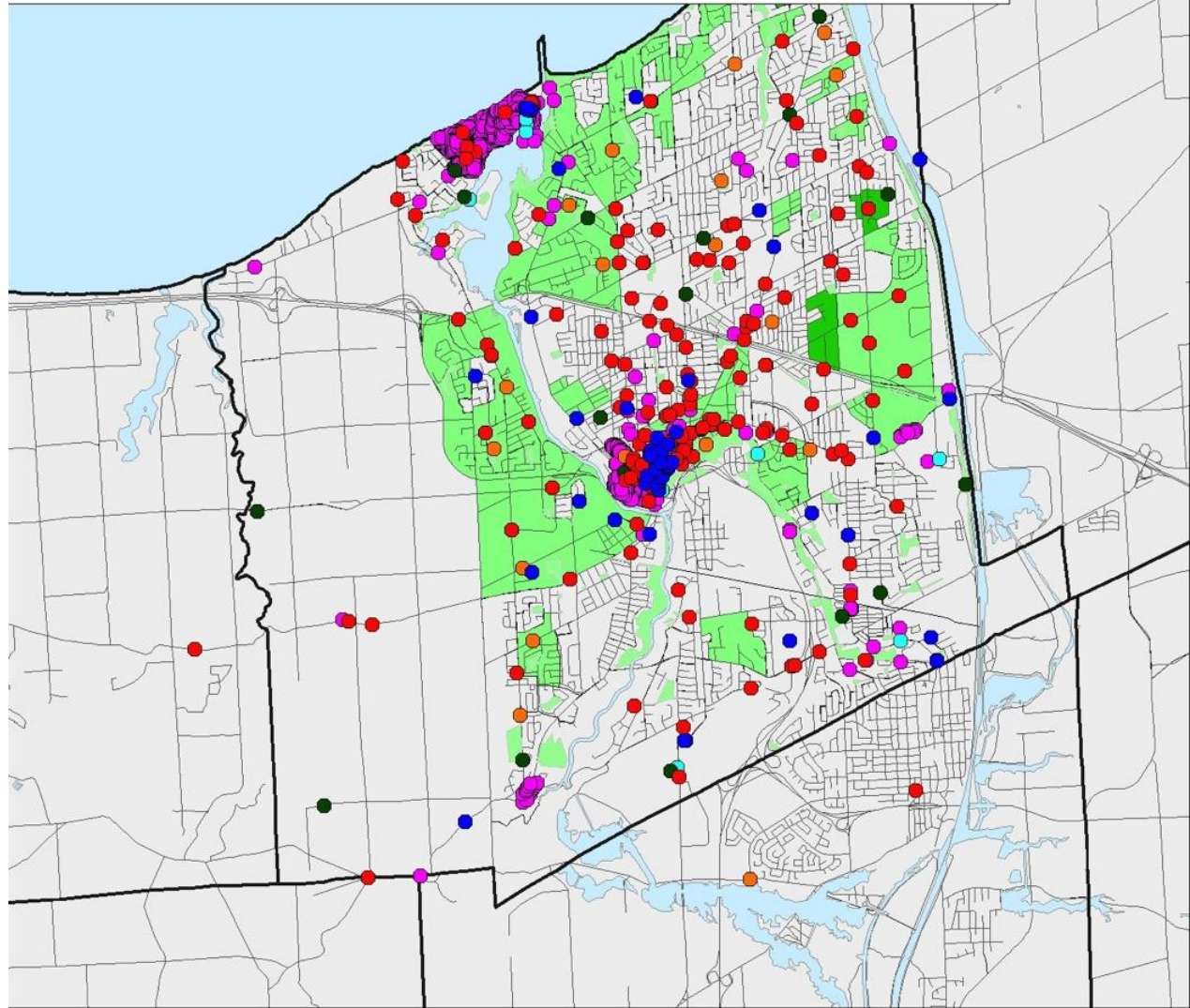
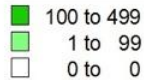
5. Cultural Mapping & Demographic Analysis

Demographic Analysis

- There are pockets of immigrants from Colombia as well.

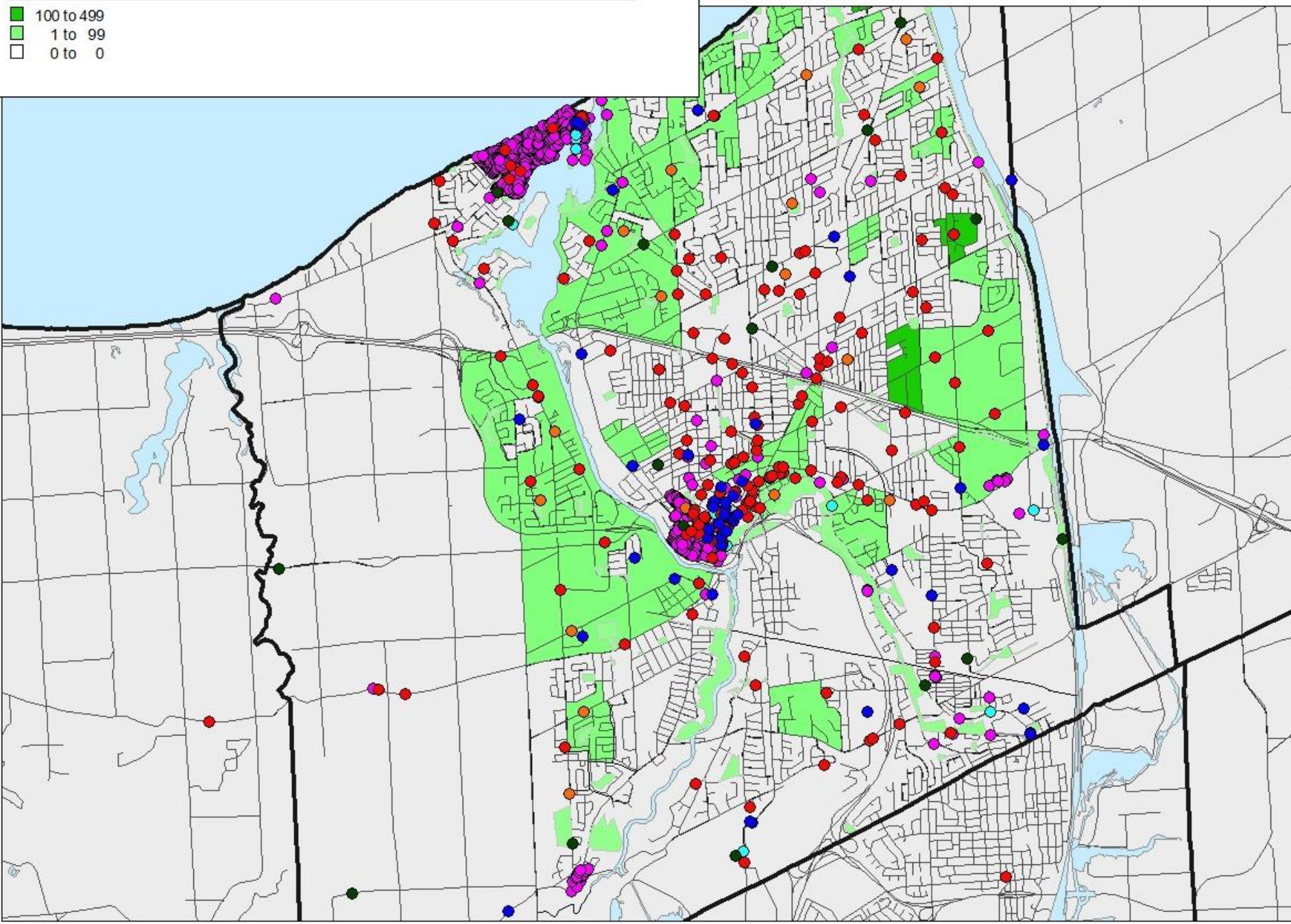
Colombian Immigrant Household Population, by Dissemination Area

City of St. Catharines, 2012



Colombian Immigrant Household Population, by Dissemination Area

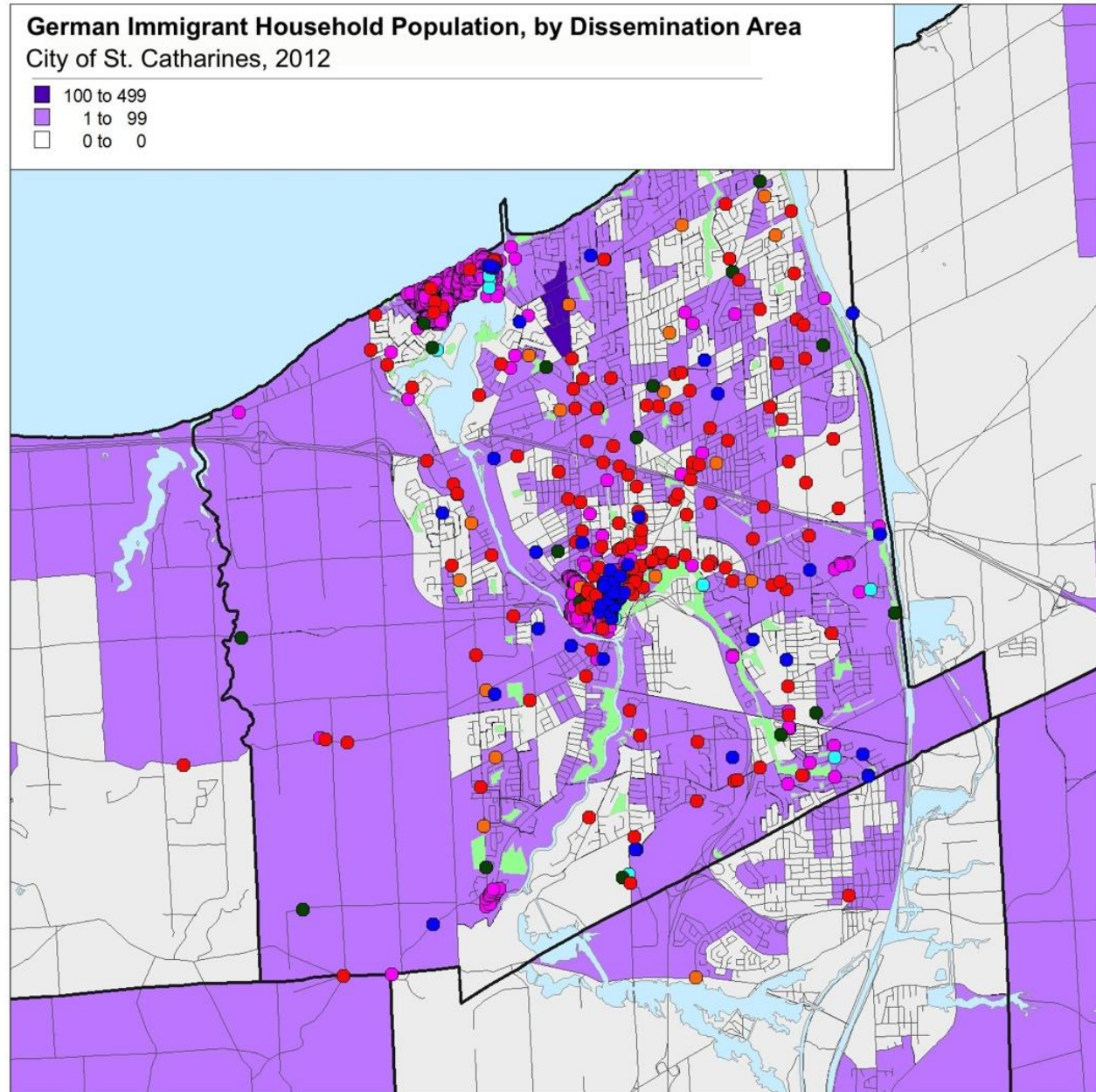
City of St. Catharines, 2012



5. Cultural Mapping & Demographic Analysis

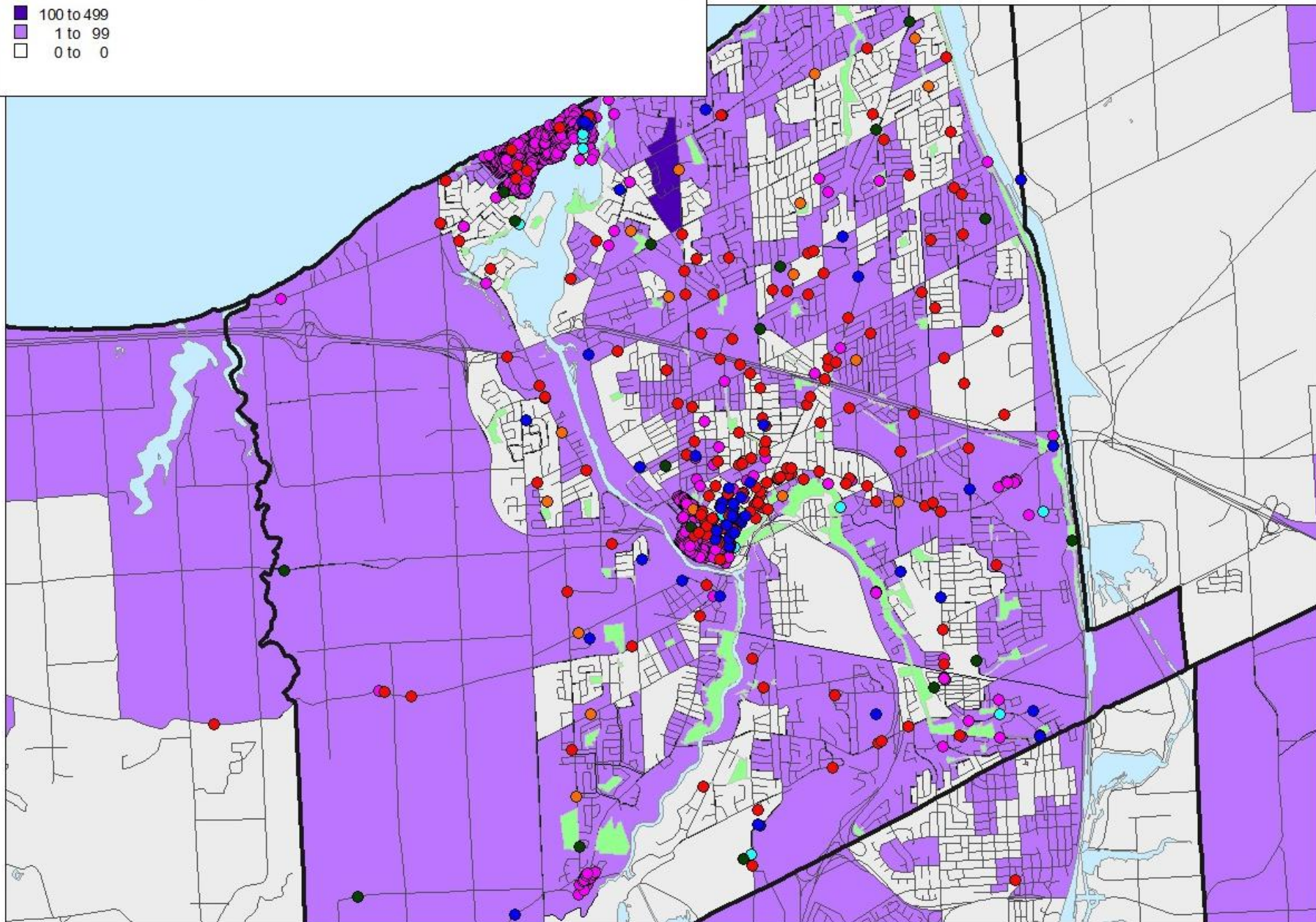
Demographic Analysis

- There are pockets of immigrants from Germany as well.

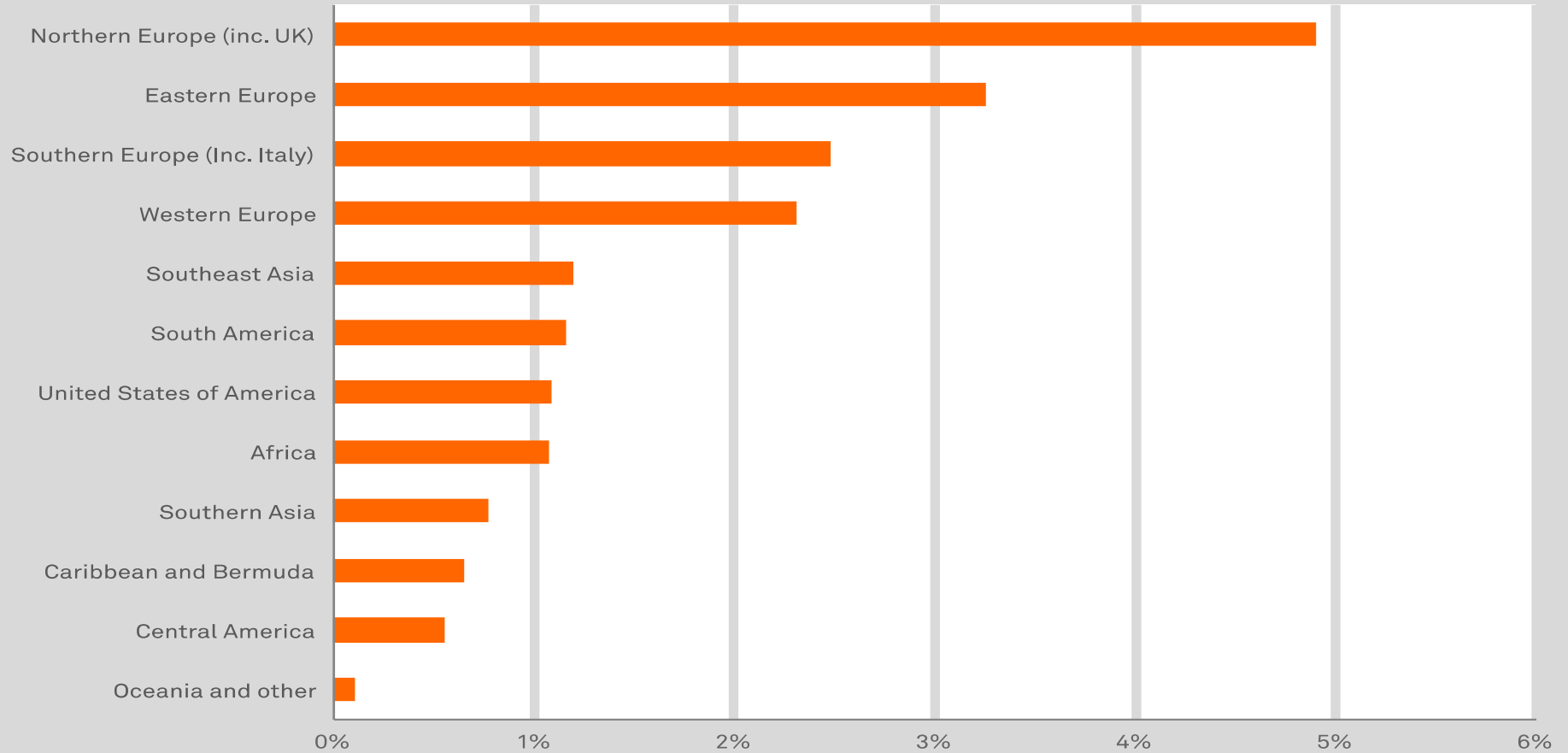


German Immigrant Household Population, by Dissemination Area
City of St. Catharines, 2012

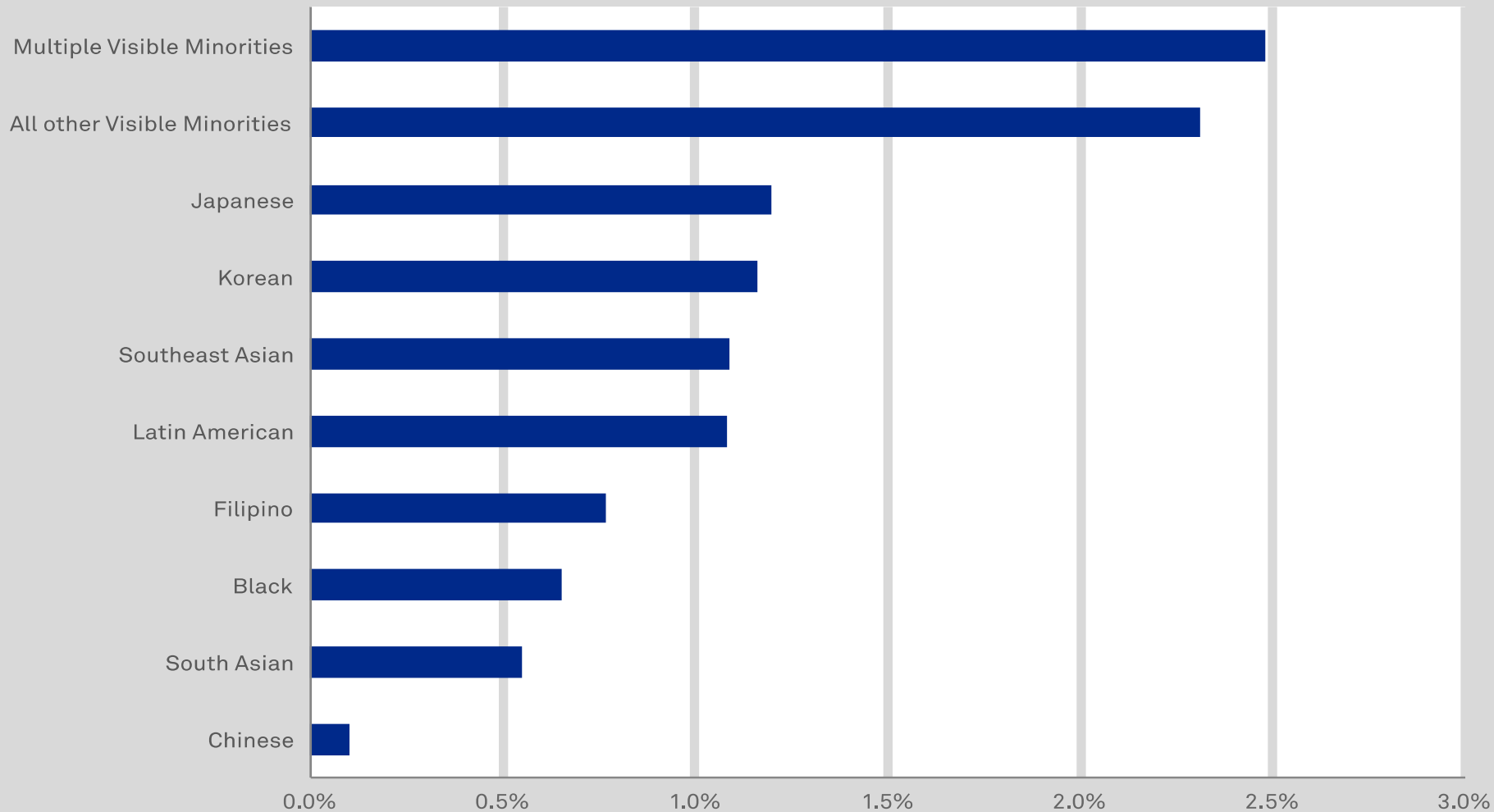
- 100 to 499
- 1 to 99
- 0 to 0



Immigrants by Place of Birth City of St. Catharines



Household Population by Visible Minority Status City of St. Catharines



5. Cultural Mapping & Demographic Analysis

Conclusions

- While formal activity is taking place in traditional performing and visual arts facilities, it is also likely that informal and amateur activity is taking place at homes and in bars and cafes, given the asset data and knowledge of participation habits of immigrant communities.
- There are limited assets and activity in and around Brock University, even while the surrounding population is highly diverse and well-educated.
- Significant concentrations of facilities and assets are clustered downtown.
- Cultural resources are concentrated in areas with lower population density.
- One of the City's strongest assets is its significant number of cultural heritage resources.
- St. Catharines has interesting diversity, with notable minority populations and pockets of immigrants from Great Britain, Colombia, India and Germany.
- There are few cultural assets available in areas of lower median incomes.

6. Artists Survey Findings

6. Artists Survey Findings

Key Findings

- St. Catharines artists face **challenges also observed in other cities.**
- **The three main challenges** for working artists - lower income, need for non-creative income, lack of time - **are strongly connected** (59% of St. Catharines artists earn less than \$10,000 yearly. As a result, they need to have another occupation, and have less time to create).
- **Space does not seem to be a priority** for artists: most of them are not interested in looking at new living/work spaces.
- Most artists work individually and in private spaces; this suggests a potential for **improved collaboration schemes.**
- **Artists work primarily on a provincial level:** while 92% sell or practice their art outside of St. Catharines, only 25% do so outside of Ontario.
- Over **half of artists receive financial support** and/or technical assistance from public institutions in St. Catharines / Niagara / Ontario.

6. Artists Survey Findings

Survey Overview

- **Conducted in 2012. 165 responses.**
- **Primary Disciplines of respondents** (Checking all that apply)

2 or 3 dimensional visual art	87	53%
Digital (installation, web, film, video, gaming)	48	29%
Graphic arts and design	30	18%
Performing Arts: Theatre	31	19%
Performing Arts: Music	33	20%
Literary Arts	17	10%
Interdisciplinary Arts	17	10%
Fibre/textile arts	15	9%
Dance	9	5%
Other	31	19%

6. Artists Survey Findings

Main Challenges for Artists

12. What are the biggest challenges in pursuing your art?		
Financial resources and income	94	60%
Another occupation/employment	69	44%
Lack of time	64	41%
Limited opportunities to exhibit or perform	58	37%
Lack of centralized marketing opportunities	45	29%
Lack of space	31	20%
Other, please specify	24	15%
Limited access to supplies and material	16	10%

- **“Other”** challenges indicated include: “lack of demand/clients”, “narrow minded attitudes in St. Catharines”, “lack of positive support from venues”, and “small art community – limited dialogue”.

6. Artists Survey Findings

Time Available for Art Making

2. On average, how many hours a week do you work or create as an artist? Check one.

Less than 10 hours	32	19%
10 to 20 hours	61	37%
20 to 30 hours	30	18%
30 to 40 hours	26	16%
More than 40 hours	16	10%
Total	165	100%

6. Artists Survey Findings

How St. Catharines' Artists Work

Most artists work individually and in private spaces.

- 64% create at their home studio.
- Only 4% of artists work or create in the public realms (park, coffee shop, community centre, etc.).
- Only 7% work in a shared or cooperative workspace.

Most artists work in the traditional artistic disciplines.

- 2-D and 3-D visual arts is the most popular (26%) followed by performing arts (music + theatre + dance = 22%).
- Relatively low percentage of digital media arts (14% overall, including web design) and crafts (only 5% work on textile arts, 1% on culinary arts).

Most artists sell or practice their art within Ontario.

- Although 92% of artists sell or practice their art outside of St. Catharines, most of them do so within the province: only 25% practice outside of Ontario.

6. Artists Survey Findings

Where Artists Meet and Network

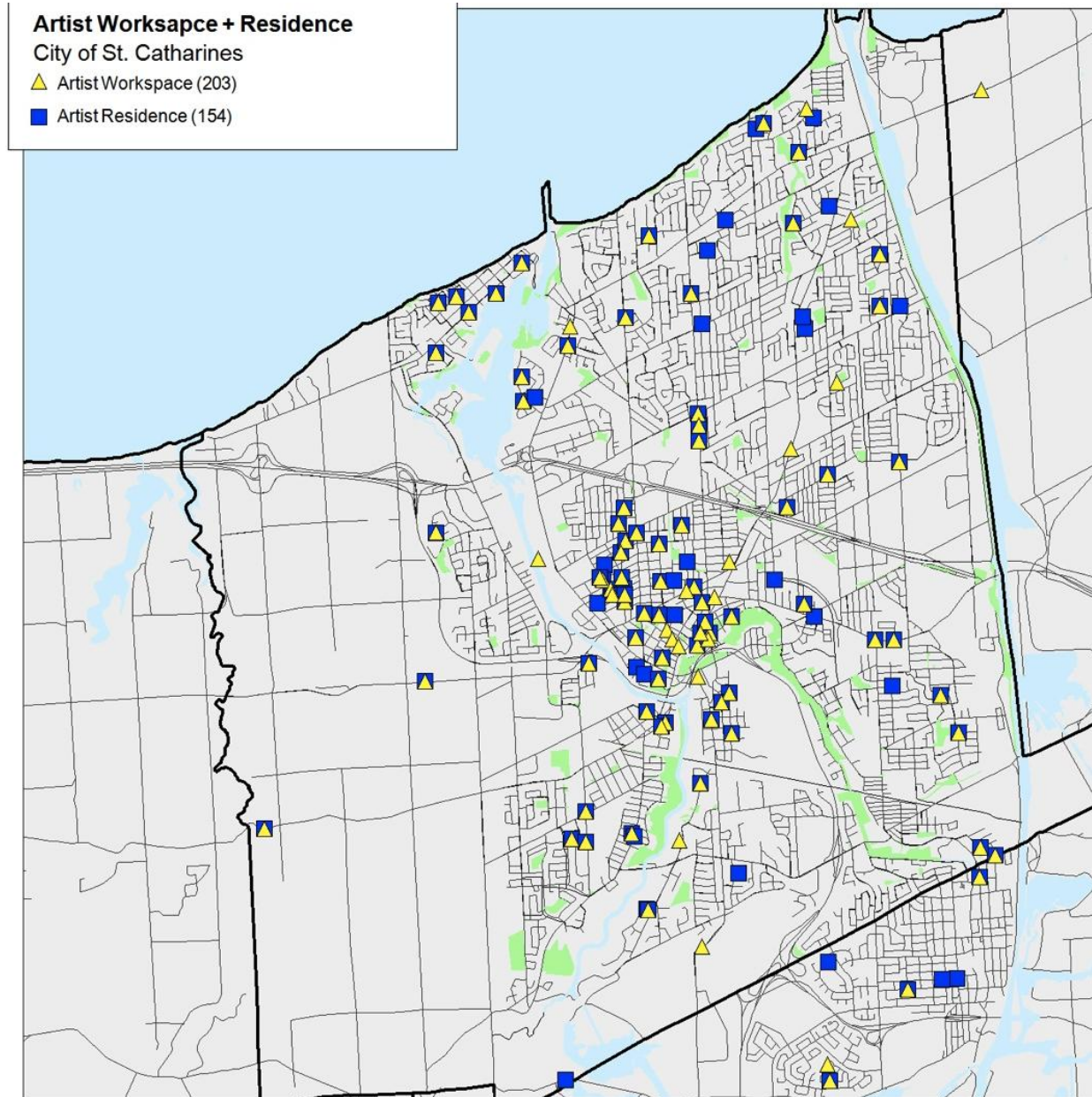
13. Where do you meet and network with other artists?	
Local arts and cultural events (within St. Catharines)	69%
On-line	55%
Regional arts and cultural events (outside of St. Catharines)	48%
In the public realm (park, coffee shop, community centre etc)	41%
Place of employment	33%
Local educational institution (within St. Catharines)	30%
Other, please specify	18%
Regional educational institution (outside of St. Catharines)	17%
Shared or cooperative studio/workspace	16%

- “**Other**” meeting points include: Art Associations, Artists Societies, Art Clubs, Art Galleries and Niagara/Hamilton area churches.
- Note that few artists meet and/or network in cooperative workspaces (16%).

6. Artists Survey Findings

Artist Workspace + Residence

- Artists are working more than living downtown.



6. Artists Survey Findings

Space does not seem to be a priority

Survey respondents were asked: If available, would you be interested in renting any of the following spaces? Check all that apply.

Live/work space	25	16%
Office/admin space	13	8%
Rehearsal space	28	17%
Studio space	52	32%
I am not interested	74	46%
Other, please specify	18	11%

6. Artists Survey Findings

Technical Assistance, Training or Advice

64% of interviewees received technical assistance from the institutions below:

15. Have you received TECHNICAL ASSISTANCE, TRAINING or ADVICE from:	
Niagara Artists Centre	52%
Other, please specify	44%
Province of Ontario	32%
The City of St. Catharines	29%
Canada Council for the Arts	15%

“**Other**” assisting institutions include: Brock University, Niagara College, Art Associations, the St. Catharines and Area Arts Council (now defunct).

6. Artists Survey Findings

Financial Support for Artists

57% of interviewees received funding from the following institutions:

14. Have you received FINANCIAL SUPPORT from any of the following	
Province of Ontario	85%
The City of St. Catharines	52%
Canada Council for the Arts	44%

7. Community Perceptions

7. Community Perceptions

Context

Public Engagement Process within Cultural Plan

- Community consultation sought diversity and depth of voice through: meetings in diverse geographic locations; traditional and non-traditional methods of public engagement including social media, a roving camera series and artists in residence; focus groups and one-on-one interviews.
- Clarified citizens' perceptions of strengths and weaknesses of the culture offered in the city.
- Gave the Lord team and City staff the opportunity to hear from residents about their experience of culture in St. Catharines.

7. Community Perceptions

Community Consultation Methodology

- **5 public town hall meetings** in different neighbourhoods in the city, held in seniors' centres, a public library and a high school. Broadly advertised.
- **5 focus groups** with representatives from the following sectors:
 - Performing Arts & Festivals Organizations;
 - Visual, Media and Literary Arts Groups;
 - Heritage and Ethnocultural Communities;
 - Emerging Artists & Cultural Workers;
 - Representatives from the Business and Tourism Community;
 - Representatives from the Heritage Community.
- **18 one-on-one interviews** with individuals selected by the City.
- **General Audience Survey**

7. Community Perceptions

Findings: Experiencing Culture in St. Catharines

There are many things to do in the city

- Residents and focus group participants express great pride in what St. Catharines has to offer.

The definition of what culture means and how communities engage in it requires clarity

- The term “culture” should encompass more than the traditional categories, of which there is a loyal but small core audience.
- A broader and more inclusive approach to defining culture would engage more residents in the community.

7. Community Perceptions

Findings: Growing and Expanding Cultural Audiences

Need to expand information about events beyond the usual circles

- There is a sense that arts groups are always informing the same people. There should be a regional approach to cultural marketing.

It is essential that the future Performing Arts Centre creates and maintains ties to existing performing arts groups.

- Desire for a model that allows everyone who wants to use the space to be able to.

The PAC's partnership with Brock University signals a new stage in the University's relationship with the city.

- Link between the city's arts community and the artistic activity at Brock.
- The hope is that students will become more civically engaged.

7. Community Perceptions

Findings: Responding to a changing and diverse demographic

As festivals and events evolve, residents feel that certain kinds of audiences are sometimes edged out of participation

- The Niagara Wine Festival is no longer the kind of festival that connects back to the community as it now caters mostly to out-of-town visitors.

There is a need for festivals and cultural events that are more inclusive

- The Niagara Folk Arts Festival is one of the only festivals that residents identified as being inclusive of diverse cultures.
- More current and contemporary approaches to involve diverse audiences is required (the focus on *folk* arts is a dated construct).
- More attention on programming for youth, immigrant populations, and those from different socio-economic backgrounds.

7. Community Perceptions

Findings: Connecting Pockets of Cultural Activity

More hubs to bring organizations and communities together

- The lack of public venues makes it difficult to share cultural activities and expressions with a broader audience.
- Diverse populations, particularly youth, require access to spaces around the city and not just one or two community centres.
- Having more community cultural spaces would help residents expand their understanding of what culture is due to greater exposure.
- There is a need for more cross-fertilization between cultural services and/or groups.

7. Community Perceptions

Positioning within the Region of Niagara

Ambivalent relationship to the Regional Municipality of Niagara

- Some residents suggested that using the name “Niagara” instead of “St. Catharines” would open the city up to a greater audience.
- Others thought that doing so would consume St. Catharines’ identity.

7. Community Perceptions

Communicating and Advocating for Cultural Activity

Information delivery systems to residents and potential tourists need improvement

- There is no centralized source of information on cultural activity that everyone can access: websites promoting the city, its festivals, and its attractions to the non-resident market are separate from the City's online listing.
- The City's online list is hidden behind various other pages and links.
- Make information accessible to immigrant communities and those other than core arts participants.

A cultural advocacy and service organization would help amalgamate and form cross-disciplinary alliances within the city

- Too many silos exist within the city and there is currently no mechanism to bring them together.
- Such an organization could also act as an advocate for the cultural sector and cultural workers.

7. Community Perceptions

Findings: Funding Cultural Activity

Opportunities for individual artist funding are limited

- Projects must be community-oriented in order to receive funding; lack of opportunities for artists and writers who generally work on their own.
- SCCIP has really benefited community groups in the city.

Perceptions are mixed regarding increased competition for funding

- Some feel that the recent trend for graduating Brock students to stay and work in the city is fantastic.
- At the same time, there are questions about how the addition of new companies in the community will impact current funding practices ie availability of SCCIP dollars.

7. Community Perceptions

Findings: Recognizing the Economic Impact of Culture

Downtown businesses could do more to attract and maintain cultural activity

- Businesses should consider staying open to coincide with gallery crawls, evening shows, Ice Dogs games, etc. to give people reasons to spend more time downtown.
- There is no sense of consistent nightlife downtown.

Transportation planning

- Need for responsible transportation planning in the downtown core to prepare for audiences descending on the PAC.

7. Community Perceptions

Findings: Prioritizing Heritage Needs

The City should take a leadership role in advocating for the preservation of all heritage sites (City- and non-City-owned)

- Maintain an up-to-date database of all heritage sites.
- The City should act as facilitator and expert in advocating for preservation and adequate maintenance of non-City-owned sites.

The City needs a succession plan for the management of heritage sites

- That ensures consistency of roles and standards, and accountability.

Coordination across City-owned heritage sites is required

- Valuable sites that could draw tourists and residents are not market-ready.
- Coordinate a unified marketing approach of the City's heritage sites to offer a consistent visitor experience.

7. Community Perceptions – Gen'l Survey Results

Introduction

The survey had a high response rate of 90.9% with 450 surveys fully completed.

The survey examined the leisure activities that participants take part in; sources of information used to learn about the events and activities in their community; their cultural participation in: museums and galleries, performing arts, festivals and events, attractions, and other events outside of St. Catharines. The survey also examined community awareness of the new performing arts centre and programming desired for the centre.

7. Community Perceptions – Gen'l Survey Results

Leisure Activities

According to survey results, residents of St. Catharines are active and enjoy running and doing yoga, and cultural activities such as music and reading. The majority of respondents work on computers, surf the web and enjoy travelling locally.

Leisure Activities that respondents participate in frequently

- 77% Listen to music;
- 76.3% work on the computer;
- 69.8% surf the web;
- 62% read books for pleasure;
- 61.%% travel within 100 km;
- 38.7% of survey participants said they attend a music, dance or theatre performance occasionally.

7. Community Perceptions – Gen'l Survey Results

My St. Catharines and Sources of Information

Top 3 Words to describe St. Catharines

- Friendly; Quaint (small town feel); Diverse
- Other words: Quiet; Safe; Beautiful; Niagara – referring to proximity

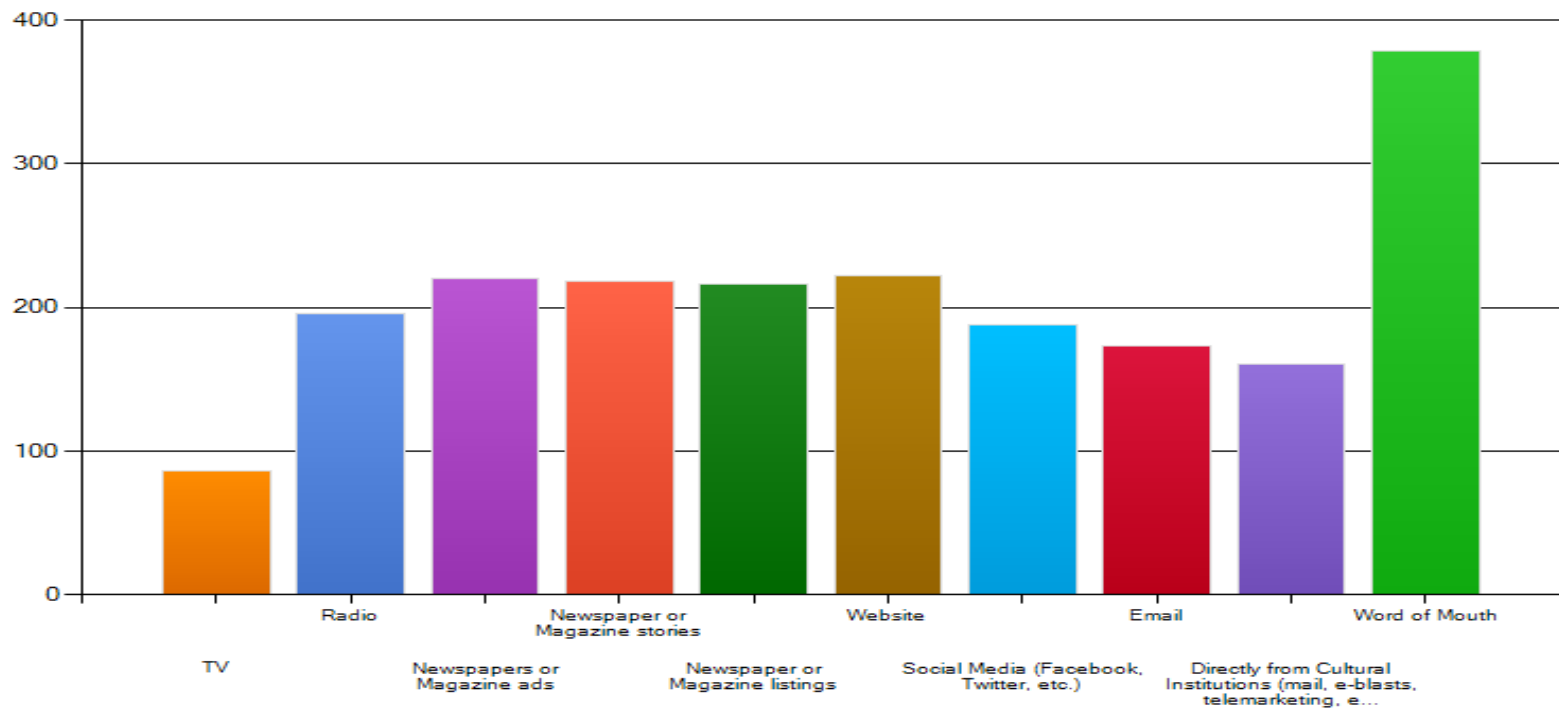
Websites most visited to learn about events

- StCatharines.ca; StCatharinesStandard.com; facebook; Brock Centre for the Arts; Grape & Wine

7. Community Perceptions – Gen'l Survey Results

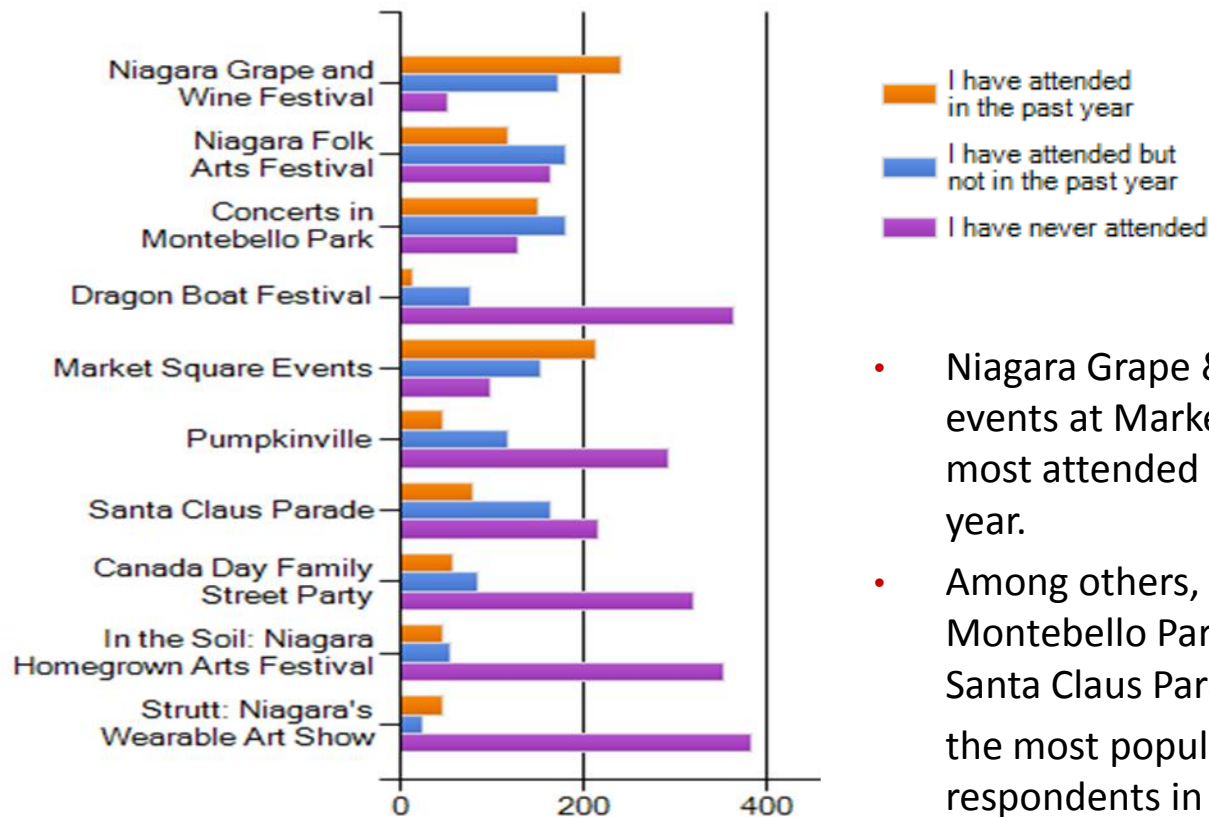
Sources of Information

Residents typically find out about activities in the Niagara region by:



7. Community Perceptions – Gen'l Survey Results

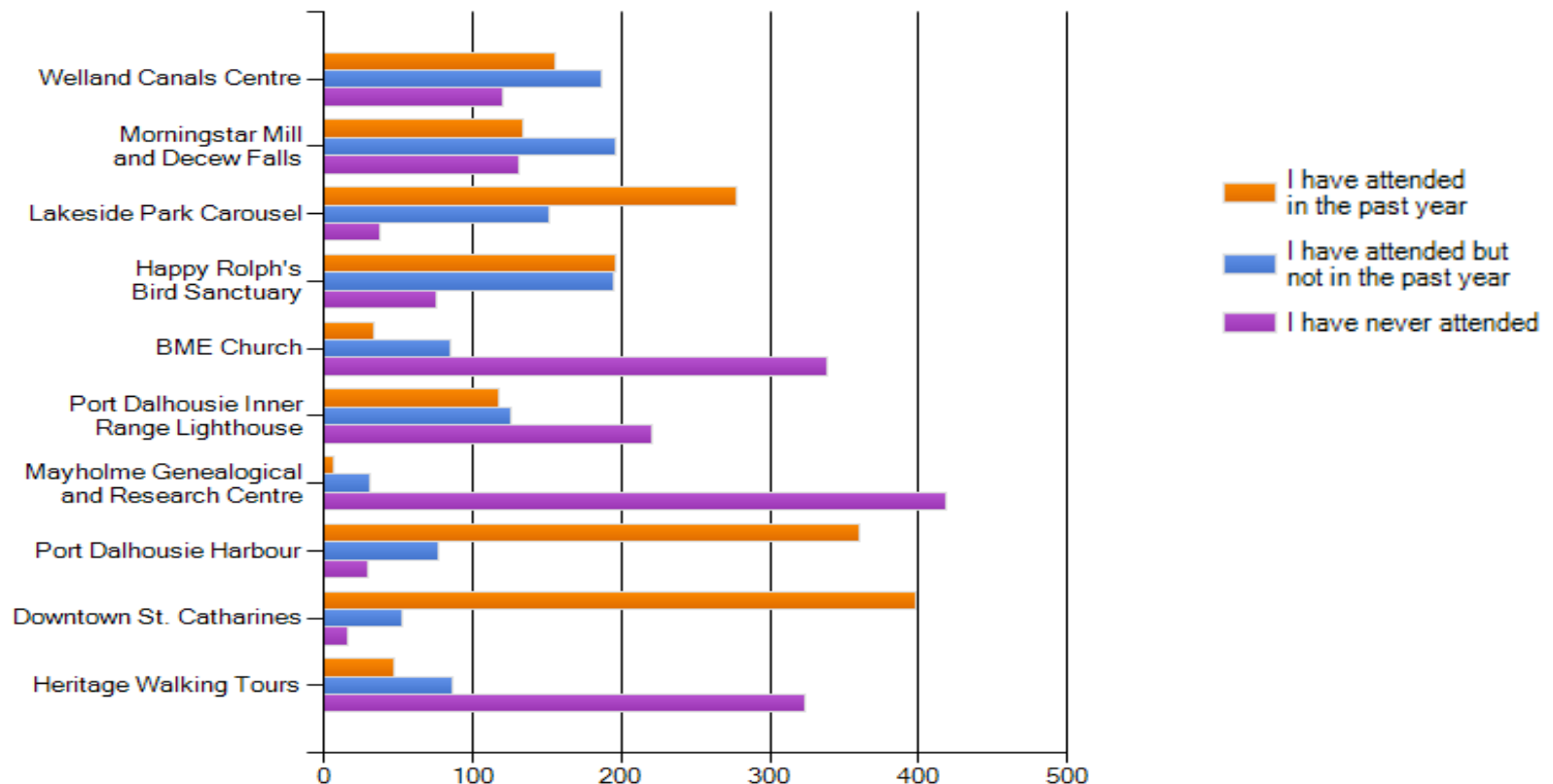
Cultural Participation: Festivals and Events



- Niagara Grape & Wine Festival and events at Market Square were most attended by respondents last year.
- Among others, Niagara Folk, Montebello Park Concerts, and the Santa Claus Parade have been the most popular among respondents in previous years.

7. Community Perceptions – Gen'l Survey Results

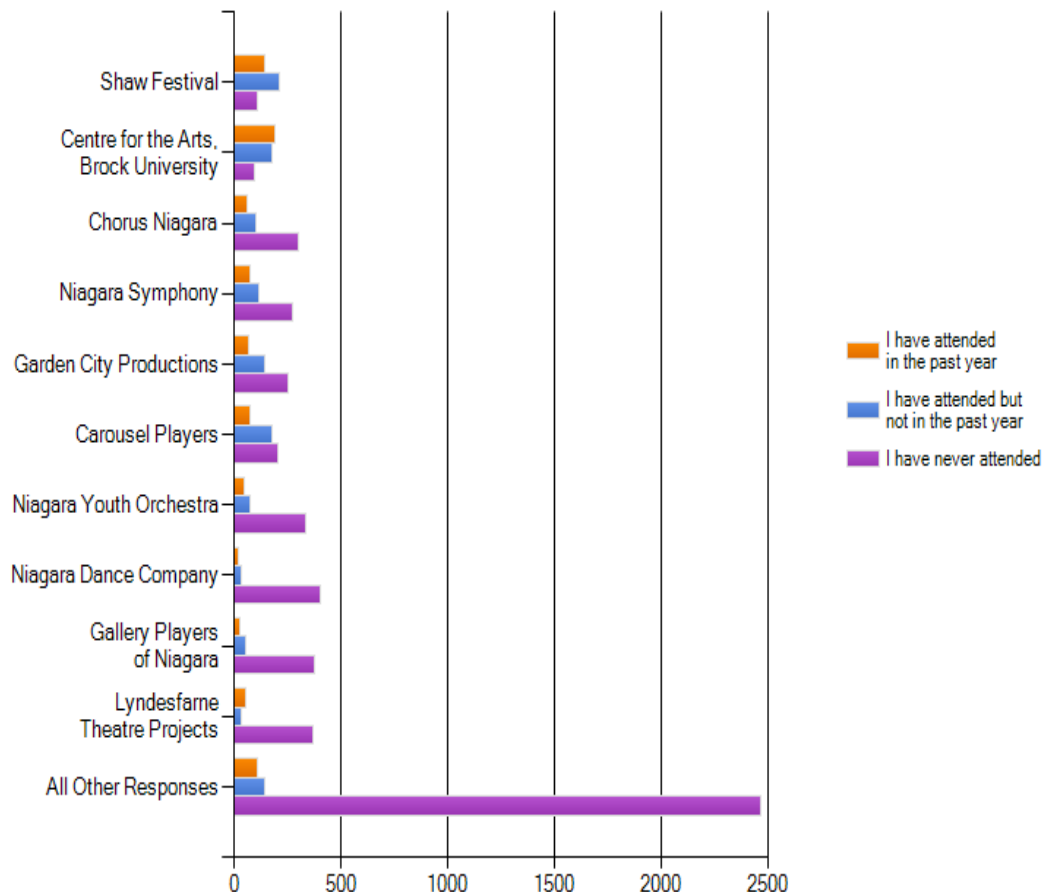
Cultural Participation: Attractions



- With the exception of Heritage Walking Tours, BME Church, and the Mayholme Centre, all other listed attractions saw respondent visitation.
- Most popular among attractions (for past year): Harbour, Downtown, Carousel.

7. Community Perceptions – Gen'l Survey Results

Cultural Participation: Performing Arts



- CFTA has the highest % of cultural visitation by respondents.
- With the exception of Shaw and CFTA, respondents are more likely to have never attended events than attended infrequently.

7. Community Perceptions – Gen'l Survey Results

Cultural Participation: Outside of St. Catharines

Other Festivals and Events attended in the Niagara region

- Jazz Festival at winery; Shaw Festival; Rib Fest; Canada Day; Balls Falls, Canal Days, Concerts

Other Attractions visited in the Niagara region

- Laura Secord House; Wineries; Jordan Village; Canal Path (Parkway); Niagara on the Lake; Falls; Festival of Lights; Gorge; Icewine Festival

7. Community Perceptions – Gen'l Survey Results

Cultural Participation: Outside of St. Catharines

Many participants stated that they go to Toronto for sport games, theatre, to visit museums and art galleries, festivals, attractions and shopping.

The following were identified by survey respondents as needed to increase the cultural experience of the community:

- Affordable family programming
- Outdoor public art spaces
- Festivals (Music, Film, Multi-arts)
- Multi-cultural food
- Outdoor skate park – Ice rink
- Highly accessible options for those with disabilities
- Convenient public transportation to cultural venues

7. Community Perceptions – Gen'l Survey Results

New Performance Arts Centre

New Performing Arts Centre

- 85.3% of survey participants are aware of the future Performing Arts Centre

New programs desired at the new Performance Arts Centre

- 83.9% Theatre
- 71.1% Film
- 68.5% Contemporary/Pop Music
- 49.0% Classical Music
- 45.4% Folkworld Music
- 41.2% Lectures

8. Findings, Key Issues and Top Line Priorities

8. Top-Line Priorities

Context and Purpose for Priorities

Priorities based on:

- Public Engagement Process
- Economic Impact Analysis
- Cultural Inventory & Mapping
- Performing Arts Centre Analysis
- Artists Survey
- Cultural Participation Analysis

Purpose is twofold:

(1) To review existing assets, needs, opportunities, and resources of St. Catharines

(2) To align the Cultural Plan with results of research, analysis and public findings.



8. Findings

Through investigation and research the following Findings were identified:

- Public discussions revealed a **lack of awareness** of events and cultural offerings in St. Catharines.
- Among stakeholders, the **definition of culture requires clarity**.
- The breadth of cultural assets in St. Catharines can build a **citywide brand and strengthen its identity**.
- St. Catharines cultural events (and overall economic impact) benefit greatly from **regional audience**.
- St. Catharines boasts a **widely diverse population**, encompassing a host of traditions, cuisines, celebrations, stories, and heritage

8. Findings

- The Performing Arts Centre will define downtown as **THE cultural anchor** of the City.
- A **concentration of creative industries** presently resides Downtown.
- Survey data reveal that **Downtown is a major focal point of artist employment.**
- St. Catharines boasts rich histories, traditions, and heritage **sites citywide.**
- Residents seek cultural activity **not only downtown** but in their backyards.
- The **Recreation Centre successfully captures cultural participants** from areas with immigrant populations.
- The **University, Waterfront, and trails** are prized by residents of St. Catharines.

8. Findings

- **Artists need affordable spaces** to create, work, rehearse, congregate, and sell their art.
- Cultural groups face **stagnant growth** in new audiences and funding support.
- The opening of the Performing Arts Centre creates a potential to **coalesce cultural groups**.
- The number of Recreation Centre cultural programs has been **declining**.
- Emerging artists and creative professionals **seek a community** for professional development, efficiencies, and innovation.
- **Sustainability** depends on collaboration, City facilitation, advocacy, and priority-setting.

8. Findings

- The **Brock community** is a relatively untapped source of cultural audiences, volunteers, supporters, and creators.
- Artists seek to congregate in St. Catharines. A potential exists for **homegrown cultural production**.
- **Heritage assets** require coordinated planning to optimize their value to the community.
- The Museum has realized dramatic increases in attendance with **Admission by Donation** policy.
- Cross-marketing, locating, and scheduling among culture and popular citywide pursuits may introduce **new residents to culture**.
- St. Catharines is home to a **large number of cultural heritage assets**, both built and natural and could benefit from coordinated efforts to heighten their awareness for residents and tourists.

8. Key Issues

7 Key Issues emerged from the Findings as follows:

1. St. Catharines has a number of unique cultural and heritage assets, programs and services that are not being effectively communicated to its constituents and potential new audiences.
2. The Municipality does not formally recognize the important role that diversity and inclusivity has in its decision and policy making.
3. St. Catharines' cultural identity is often obscured within the Niagara region tourism hub.
4. There is a general lack of community **understanding** and **awareness** of the **importance** of culture's **role** in building healthy and vibrant cities.

8. Key Issues

7 Key Issues emerged from the Findings as follows:

5. There is an unclear understanding of **responsibility** for culture between the municipal and regional governments as well as a lack of **integration** of culture and heritage organizations and with the other sectors within the municipal government.
6. Many of the city's cultural organizations lack organizational capacity to sustain themselves in the long term. And there is limited City infrastructure that could enable better communication and collaboration amongst the arts and heritage organizations in St. Catharines.
7. A top priority for the City is the development and revitalization of the downtown. However, there is limited access to cultural offerings across all the other neighbourhoods in St. Catharines.

8. Top-Line Priorities

5 Top-line priorities have been developed as a response to the key issues.

1. Effectively Communicate Culture to all Citizens of St. Catharines
2. Remove any and all barriers to Culture to allow unfettered access to the city's multitude of services, programs and assets
3. Maximize Opportunities to build organizational capacity
4. Recognize and embrace the city's cultural diversity as a cornerstone for civic engagement
5. Celebrate St. Catharines Unique Cultural Identity

9. Next Steps



9. Next Steps

- **Feedback and discussion around findings and top-line priorities.**
- **Research on best practices around potential implementation strategies to address priorities.**
- **Research on comparable cities to understand how these priorities have been addressed.**
- **Draft Cultural Plan that includes implementation strategies to address each top-line priority.**

Appendices

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2009

Impact of SCCIP Spending on Ontario 2009					
Base Year Budget	Inputs	Multipliers		Outputs	
Category	Purchases	Gross Production	Empl't (FTE jobs)	New Sales (\$000's)	New Empl't (jobs)
Electric Power Generation, Transmission and Distribution	\$ 406	1.27	4.35	\$ 516	0.0
Natural Gas Distribution, Water, Sewage and Other Utilities	\$ 38,470	1.30	4.97	\$ 50,011	0.2
Printing and Related Support Activities	\$ 80,227	1.34	6.88	\$ 107,504	0.6
Retail Trade	\$ 178,254	1.41	15.47	\$ 251,338	2.8
Transit and ground passenger transportation	\$ 52,906	1.53	16.70	\$ 80,945	0.9
Postal service, couriers and messengers	\$ 44,299	1.43	12.55	\$ 63,348	0.6
Motion picture and sound recording industries	\$ 221,966	1.58	8.09	\$ 350,706	1.8
Radio and Television Broadcasting	\$ 24,517	1.57	8.33	\$ 38,492	0.2
Publishing, info services and data processing	\$ 38,064	1.48	8.72	\$ 56,334	0.3
Finance, insurance, real estate, rental and leasing	\$ 70,139	1.68	8.30	\$ 117,834	0.6
Administrative support services	\$ 115,536	1.33	17.20	\$ 153,663	2.0
Waste management	\$ 38,470	1.35	7.23	\$ 51,934	0.3
Arts, entertainment and recreation	\$ 283,654	1.54	15.76	\$ 436,826	4.5
Accommodation and food services	\$ 41,347	1.53	18.31	\$ 63,261	0.8
Repair and maintenance	\$ 17,941	1.39	17.39	\$ 24,938	0.3
Nonprofit educational services	\$ 122,946	1.24	11.71	\$ 152,453	1.4
Averages and Totals	\$ 1,369,142	1.44	11.37	\$ 2,000,105	17.1

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2009

Estimated Attendance for SCCIP Grantee Programs 2009		
Total Attendance		55,687
Projected Incremental Attendance		55,687
1. Ontario (Niagara Region) Attendance	90%	50,118
2. Ontario (non-Niagara Region) Attendance	8%	4,455
3. Non-Ontario Attendance	2%	1,114

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2009

Ancillary Spending Impact 2009	Per Capita Expenditure Estimate	Total Direct Expenditures of Audiences	Gross Production Multiplier	Gross Production	Empl't (jobs) Multiplier	Total New Jobs
Resident Attendance (1)						
Accommodation and food services	\$8.15	\$408,464	1.5300	\$624,950	18.3100	7.48
Retail Trade	\$2.80	\$140,331	1.4100	\$197,867	15.4700	2.17
Transit and ground passenger transportation	\$4.27	\$214,005	1.5300	\$327,428	16.7000	3.57
<i>Sub-total</i>		\$762,801		\$1,150,245		13.22
Non-resident Attendance (2+3)						
Food services and drinking places	\$15.28	\$85,090	1.5300	\$130,187	18.3100	1.56
Retail Trade	\$8.70	\$48,448	1.4100	\$68,311	15.4700	0.75
Transit & passenger transportation	\$5.82	\$32,410	1.5300	\$49,587	16.7000	0.54
<i>Sub-total</i>		\$165,947		\$248,086		2.85
Total Impact of Ancillary Spending						
	Regional Attenders	\$762,801		\$1,150,245		13.22
	Non-regional Attenders	\$165,947		\$248,086		2.85
	Total	\$928,748		\$1,398,331		16.07

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2010

Impact of SCCIP Grantee Spending on Ontario 2010					
Category	Inputs	Multipliers		Outputs	
	Purchases	Gross Production	Empl't (FTE jobs)	New Sales (\$000's)	New Empl't (jobs)
Electric Power Generation, Transmission and Distribution	\$ 2,344	1.27	4.35	\$ 2,977	0.0
Natural Gas Distribution, Water, Sewage and Other Systems	\$ 60,415	1.30	4.97	\$ 78,539	0.3
Printing and Related Support Activities	\$ 92,592	1.34	6.88	\$ 124,074	0.6
Retail Trade	\$ 248,708	1.41	15.47	\$ 350,678	3.8
Transit and ground passenger transportation	\$ 41,836	1.53	16.70	\$ 64,009	0.7
Postal service, couriers and messengers	\$ 53,370	1.43	12.55	\$ 76,319	0.7
Motion picture and sound recording industries	\$ 163,298	1.58	8.09	\$ 258,011	1.3
Radio and Television Broadcasting	\$ 30,418	1.57	8.33	\$ 47,756	0.3
Publishing, info services and data processing	\$ 58,071	1.48	8.72	\$ 85,944	0.5
Finance, insurance, real estate, rental and leasing	\$ 75,510	1.68	8.30	\$ 126,857	0.6
Administrative support services	\$ 117,349	1.33	17.20	\$ 156,074	2.0
Waste management	\$ 60,415	1.35	7.23	\$ 81,560	0.4
Arts, entertainment and recreation	\$ 365,075	1.54	15.76	\$ 562,215	5.8
Accommodation and food services	\$ 18,865	1.53	18.31	\$ 28,864	0.3
Repair and maintenance	\$ 21,222	1.39	17.39	\$ 29,498	0.4
Nonprofit educational services	\$ 105,904	1.24	11.71	\$ 131,321	1.2
Averages and Totals	\$ 1,515,391	1.44	11.37	\$ 2,204,697	19.0

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2010

Estimated Attendance for SCCIP Grantee Programs 2010		
Total Attendance		50,636
Projected Incremental Attendance		50,636
1. Ontario (Niagara Region) Attendance	90%	45,572
2. Ontario (non-Niagara Region) Attendance	8%	4,051
3. Non-Ontario Attendance	2%	1,013

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2010

Ancillary Spending Impact 2010	Per Capita Expenditure Estimate	Total Direct (Induced) Expenditures	Gross Production Multiplier	Gross Production	Empl't (jobs) Multiplier	Total New Jobs
Regional Attendance (1)						
Accommodation and Food Services	\$8.15	\$371,415	1.5300	\$568,265	18.3100	6.80
Retail Trade	\$2.80	\$127,603	1.4100	\$179,920	15.4700	1.97
Transit and Ground Passenger Transportation	\$4.27	\$194,594	1.5300	\$297,729	16.7000	3.25
<i>Sub-total</i>		\$693,612		\$1,045,914		12.02
Non-regional Attendance (2+3)						
Food services and drinking places	\$15.28	\$77,372	1.5300	\$118,379	18.3100	1.42
Retail Trade	\$8.70	\$44,053	1.4100	\$62,115	15.4700	0.68
Transit & passenger transportation	\$5.82	\$29,470	1.5300	\$45,089	16.7000	0.49
<i>Sub-total</i>		\$150,895		\$225,583		2.59
Impact of Ancillary Spending	Regional Attenders	\$693,612		\$1,045,914		12.02
	Non-regional Attenders	\$150,895		\$225,583		2.59
	Total	\$844,507		\$1,271,497		14.61

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2011

Impact of SCCIP Grantee Spending on Ontario 2011					
Category	Inputs Purchases	Multipliers Gross Production	Empl't (FTE jobs)	Outputs New Sales (\$'000's)	New Empl't (jobs)
Electric Power Generation, Transmission and Distribution	\$ 3,656	1.27	4.35	\$ 4,643	0.0
Natural Gas Distribution, Water, Sewage and Other Systems	\$ 70,195	1.30	4.97	\$ 91,254	0.3
Printing and Related Support Activities	\$ 75,565	1.34	6.88	\$ 101,257	0.5
Retail Trade	\$ 285,636	1.41	15.47	\$ 402,746	4.4
Transit and Ground Passenger Transportation	\$ 55,466	1.53	16.70	\$ 84,863	0.9
Postal Service, Couriers and Messengers	\$ 48,217	1.43	12.55	\$ 68,951	0.6
Motion Picture and Sound Recording Industries	\$ 170,725	1.58	8.09	\$ 269,746	1.4
Radio and Television Broadcasting	\$ 24,278	1.57	8.33	\$ 38,117	0.2
Publishing, Info Services and Data Processing	\$ 66,539	1.48	8.72	\$ 98,478	0.6
Finance, Insurance, Real Estate, Rental and Leasing	\$ 136,043	1.68	8.30	\$ 228,552	1.1
Administrative Support Services	\$ 136,471	1.33	17.20	\$ 181,506	2.3
Waste Management	\$ 70,195	1.35	7.23	\$ 94,764	0.5
Arts, Entertainment and Recreation	\$ 393,156	1.54	15.76	\$ 605,461	6.2
Accommodation and Food Services	\$ 41,119	1.53	18.31	\$ 62,912	0.8
Repair and Maintenance	\$ 37,667	1.39	17.39	\$ 52,357	0.7
Nonprofit Educational Services	\$ 90,850	1.24	11.71	\$ 112,654	1.1
Averages and Totals	\$ 1,705,779	1.44	11.37	\$ 2,498,260	21.7

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2011

Estimated Attendance for SCCIP Grantee Programs 2011		
Total Attendance		50,583
Projected Incremental Attendance		50,583
1. Ontario (Niagara Region) Attendance	90%	45,525
2. Ontario (non-Niagara Region) Attendance	8%	4,047
4. Regional (non-Ontario) Attendance	2%	1,012

Appendix 1. Source Charts for SCCIP Impact

Back up charts 2011

Ancillary Spending Impact 2011	Per Capita Expenditure Estimate	Total Direct (Induced) Expenditures	Gross Production Multiplier	Gross Production	Empl't (jobs) Multiplier	Total New Jobs
Resident Attendance (1)						
Accommodation and Food Services	\$8.15	\$371,026	1.5300	\$567,670	18.3100	6.79
Retail Trade	\$2.80	\$127,469	1.4100	\$179,732	15.4700	1.97
Transit and Ground Passenger Transportation	\$4.27	\$194,390	1.5300	\$297,417	16.7000	3.25
<i>Sub-total</i>		\$692,886		\$1,044,819		12.01
Non-resident Attendance (2+3)						
Food Services and Drinking Places	\$15.28	\$77,291	1.5300	\$118,255	18.3100	1.42
Retail Trade	\$8.70	\$44,007	1.4100	\$62,050	15.4700	0.68
Transit & Passenger Transportation	\$5.82	\$29,439	1.5300	\$45,042	16.7000	0.49
<i>Sub-total</i>		\$150,737		\$225,347		2.59
Impact of Ancillary Spending						
Regional Attenders		\$692,886		\$1,044,819		12.01
Non-regional Attenders		\$150,737		\$225,347		2.59
Total		\$843,623		\$1,270,166		14.60

Appendix 2. Stakeholders Interview List

- Colin Briggs, Chief Administrative Officer, VIA PHONE
- Jeff Burch, City Councillor and Executive Director of Folk Arts
- Paul Chapman, Director of Planning Services
- Councillor Mark Elliott, City of St. Catharines
- Jane Gardner, General Manager, Carousel Players
- Deanna Jones, Artistic Director, Suitcase in Point
- Rick Lane, Director of Recreation and Community Services
- Mayor Brian McMullan, Mayor of the City, St. Catharines
- Jack Mills, Executive Director, Niagara Symphony
- David Oakes, Director, Economic Development and Tourism
- Councillor Bill Phillips, City of St. Catharines
- Kathy Powell, Curator and Supervisor, Museum Operations
- Councillor Mat Siscoe, City of St. Catharines
- Deb Slade, Executive Director, Centre for the Arts
- Steve Solski, Executive Director, St. Catharines Performing Arts Centre
- Councillor Len Stack, City of St. Catharines
- Lilita Stripnieks, Executive Director, St. Catharines Public Library
- Annie Wilson, Executive Director, Suitcase in Point