

The Destination

The City of Niagara Falls has been synonymous with tourism - providing visitors with an array of attractions, fine accommodations and vacation ideas that complement the cornerstone of our Tourism industry - the magnificent Niagara Falls.



Approximately 14 million tourists¹ visit the City each year, and over \$2 billion in tourism revenues has generated some exciting new developments, each of which contributes to our presence as a year round, world class tourism destination.

Tourism in the Niagara Region- Quick Facts

- 19 million visitors per year, expected to grow to 20+ million by 2004, in 10 years
Niagara is expected to attract 30 million annual visitors
- 60% of visitors are in Niagara Falls for a day-trip
40% of visitors stay overnight (household income \$80,000+)
- Overnight visitors stay an average of 2.3 nights
- 29,000 visitors in Niagara per night in the Summer months
- \$1.5 billion tourism dollars spent in 2000, estimated at \$2 billion in 2002
- \$2.8 billion of investment opportunities available over the next 20 years
- Current inventory of 14,500 accommodation units with 50% of these in the 3-4 star category. By 2004 the total is expected to reach 16,000+ with the additional units currently under construction
- Tourism employment estimated at 26% of total workforce (over 30,000 jobs)

Source: Niagara Falls Tourism & Niagara Economic and Tourism Corporation & City of Niagara Falls Tourist and Economic Impact Statistics

¹ Niagara Parks Commission - Trivia page at <http://www.niagaraparks.com/nfgg/trivia.php>
Niagara Parks Commission - Study Guide page at http://www.niagaraparks.com/aboutus/study_guide.php

A Complete Tourism Package

Casino gaming, new accommodation and attraction investment, a burgeoning regional wine industry, cultural and heritage tourism product, and a shared tourism vision have all helped Niagara Falls, Ontario to develop the reputation of a complete, world class tourism destination. And with opportunity for new attraction, entertainment and retail investment still in abundance, there has never been a better time to consider Niagara Falls.

The Niagara Parks Commission has worked closely with the City for decades in an effort to beautify our tourist area, and allow the public to enjoy the natural wonders of the Falls and our parks at their leisure. Many successful local, national and international private tourism leaders have joined the team of successful tourism related businesses located here in the falls.



*Family Attractions.....
Gaming and much more!*



Golf....

Market and Visitor Information

Niagara Falls is a Canadian Tourism Icon. Niagara is one of the largest entry points for visitors to the country, *Niagara Falls* is the most internationally recognized Canadian tourist destination. The City's proximity to the U.S., as well as several major urban centres (both Canadian and American), creates an enormous, easily accessible tourism market from which to draw. The healthy state of Niagara's economy encourages, supports, and enhances the growth of tourism in Niagara Falls.

Exhibit 1 - Distances to Major Urban Centres

City	Kilometres	Miles	Driving time
Baltimore, Md.	829	515	9 hr.
Boston, Mass.	808	502	8.5 hr.
Buffalo, N.Y.	35	18	30 min.
Chicago, Ill.	843	524	9.5 hr.
Detroit, Mich.	380	228	4.5 hr.
Montreal, Que.	670	428	7.5 hr.
New York, N.Y.	761	473	8 hr.
Ottawa, Ont.	530	315	6 hr.
Quebec City, Que.	961	597	11 hr.
Toronto, Ont.	130	81	1 hour
Washington, D.C.	819	509	9 hr.

For further information on travelling distances, visit the Province of Ontario Distance Table at:

<http://www.gov.on.ca/MBS/english/distance/index.html>

Unparalleled Exposure

Within a 150km radius of Niagara Falls live 13.1 million people - a vast tourism market containing many repeat visitors within a 2 hour drive to the City. A market of this size would sustain a tourism industry on its own in many communities, but the splendour of Niagara Falls attracts long haul visitors just as well. Residents of the United States, as well as overseas travellers contribute greatly to the tourism market in Niagara. The following charts and tables illustrate the strength of the Niagara Falls tourism market.

Exhibit 2a: Drive-in markets

- Ontario (Toronto & Southern Ontario)
- New York
- Boston
- Chicago
- Detroit
- Montreal
- Ottawa
- Baltimore
- Washington, D.C.

Exhibit 2b: Europe & Asian Market

- U.K., France & Germany
- Japan

New specialized niche-products such as Golf, Wine & Culinary Tourism, Meeting & Convention and Incentive Travel packages will provide opportunities for family/couples mainstream and affluent markets.

Southern Ontario and the GTA will continue to be our primary key domestic target market.

Of the more than 14 million annual visitors to Niagara Falls, 66% are from the United States, 26% are from Canada, of which 50% of the visitors live in Toronto area. Overseas tourism represents a small, but extremely important portion of the market 6-8% of all visitors are from overseas locations, but overseas tourist spending accounts for 1/5 of the City's total tourism revenues. In 2002 consumer domestic and U.S. visitors increased while Asian/European group tours are down. Family/couple consumer market remained strong during 2002. Increase in length of overnight stay to an average of 2.3 nights and average household income increased to \$80,000.

Market segmentation and length of visitors overnight stays

Visitor Type	% of Total Visitors	% That Stay Overnight	Avg. Trip Length
Domestic	26%	43%	2.2 nights
American	66%	22%	2.4 nights
Other Foreign	8%	82%	1.9 nights

Source: Cities Report

Exhibit 4 - Demographic characteristics of Ontario residents within 240 km

Population	1-150 km	151-240 km	1-240 km
(1996 projection)	6.727 million	1.311 million	8.038 million
(2001 projection)	7.385 million	1.389 million	8.775 million
Male	48.3%	49.2%	48.5%
Female	51.7%	50.8%	51.5%
Average household Income (1996)	\$82,301	\$67,380	\$79,223
Age			
0-14	20.1%	21.1%	20.2%
15-19	6.6	6.8	6.6
20-29	16.9	14.6	16.5
30-39	17.6	16.3	17.4
40-49	13.8	13.0	13.8
50-59	9.4	9.4	9.4
60-64	4.4	4.8	4.4
65+	11.2	14.0	11.7
Marital status			
Single	43.7%	41.1%	43.3%
Married	44.9	46.6	45.2
Widowed	4.9	5.7	5.0
Divorced/separated	6.5	6.6	6.5

Exhibit 5 - Demographic characteristics of US residents within 240 km

Population	1-150 km	151-240 km	0-240 km
(1997 estimate)	2.761 million	1.729 million	4.491 million
Average household income (1997 estimate)	US \$36,413	US \$32,959	US \$34,310
Age			
0-13	19.5%	19.9%	19.7%
14-20	10.0	11.1	10.4
21-34	22.5	21.9	22.8
35-44	14.7	14.4	14.6
45-54	10.1	9.9	10.0
55-64	9.2	8.9	9.1
65+	14.0	13.9	14.0
Marital status			
Single	28.8%	27.3%	28.3%
Married	53.3	55.4	54.1
Widowed	8.2	7.9	8.1
Divorced/separated	9.7	9.4	9.5

Source: *Niagara Falls Multi-Purpose Feasibility Study*

Annual Niagara Visitor Volume and Expenditures

Exhibit 6 - Niagara Region - Increases in Number of Annual Visitors and Tourism Expenditures

Time Period	# of Annual Visitors	Annual Tourism Expenditures
1995 (Pre Casino)	10-14 million visitors	Approx \$1.5 billion
1996-present (with temporary casino impact)	16-19 million visitors	Approx \$2 billion
2004 (projection) (with permanent casino impact)	20+ million visitors	\$2 + billion

Exhibit 7 - Provincial and Federal Tourism Statistics

Category	# of Annual Visitors	Annual Tourism Expenditures
Province of Ontario	106.1 million visitors	Approx. \$16.5 billion
Canada	19.4 million trips (international) + 74.6 million trips (domestic) = 86 million trips (total)	Approx \$54.1 billion

Sources: Ontario Ministry of Economic Development and Trade and the Canadian Tourism Commission

The Plan

Tourism Area Development Strategy

The *Niagara Falls Tourism Area Development Strategy* describes the City's vision to create and maintain a world class destination, and modern urban centre at the heart of one of the world's natural wonders. The master plan is structured around encouraging visitors to stay longer, return more frequently, and spend more money in Niagara Falls. The following is an outline of our tourism development strategy.

Goals:

- to ensure co-operation and an integrated approach from the City, Niagara Parks Commission, the Niagara Region, Province of Ontario, Government of Canada, and the private sector in working towards our aggressive vision
- to enhance the image of Niagara Falls in the marketplace
- to focus on higher yield tourist groups, both domestic and international
- to increase tourism spending, lengthen visitor stays, and extend the tourism season

Objectives:

- to provide investors with an attractive and stable investment environment
- to stimulate growth in the Tourist Area of Niagara Falls in a strategic manner

Special Events And Festivals Strategy

The City is also investing in exciting special events and festivals that enhance the image of Niagara Falls as a fun, entertaining place to live and to visit. The City is aggressively pursuing and planning special events that link back to our overall strategy; extending the tourism season, lengthening visitor stays, and increasing tourism spending.

Each event or festival in Niagara creates off-peak seasonal demand for accommodations, services, and attractions, and showcases the tourism assets of the Niagara Region.

Heritage Attractions and Events

Niagara Falls is overflowing with cultural significance. It is the intention of the city to capture and preserve the rich history and tradition of our area through fun and educational heritage festivals and events. From the re-enactment of the Battle of 1812, to the Lundy's Lane Historical Museum, to the Shaw Festival, visiting a cultural site in Niagara is truly a memorable experience. In addition, events highlighting contemporary culture such as fine wine making and cuisine are in abundance.

Exhibit 9: Sample of Major Special Events and Festivals in Niagara Falls

Special Event/Festival	Features	Season
Winter Festival of Lights	Disney lighting displays, enchanting landscape lighting along the parkway, fireworks extravaganzas, live entertainment, Festival Night Parade	Winter
New Year's Eve Celebration	World renowned entertainers at a live, nationally televised outdoor concert and celebration, fireworks displays	Winter
Icewine Celebration	Icewine tasting, tours, luncheons and other special programs	Winter
Spring Festival	10 days of excitement featuring a spectacular parade, free outdoor concerts, floral and lighting displays, fireworks, shows and exhibits	Spring
Niagara Heritage Festival	Heritage related displays and exhibits	Spring
Shaw Festival	World class theatre performances of the works written by famous playwright George Bernard Shaw	Summer
Falls Friday and Sunday Fireworks	Fireworks displays over the falls every Friday evening throughout the season	Summer
Concert Band Series	Popular Local bands performing free, live, outdoor concerts	Summer
Casino Niagara International Marathon	Marathon, half marathon, in-line marathon, friendship run, (all taking place along a beautiful Parkway route), and runners' expo	Fall
Wine and Culinary Event	Chefs and establishments from around the region preparing an array of culinary delights	Fall
Doors Open Niagara	Dozens of the areas most historical and architecturally significant buildings open to the public for free tours	Fall
Blues in the Park	Outdoor blues festival featuring live jazz performances	Fall
Art by the Falls	A weekend of outdoor entertainment featuring art and craft displays by Canadian artisans	Fall

Source: City of Niagara Falls event listings at http://www.niagarafalls.ca/about_niagara_falls/events_calendar/index.asp

Sporting Events and Attractions

Quality venues and exciting events combine together to strengthen our sports tourism market. Local and touring athletes alike enjoy the variety of special athletic events taking place in Niagara Falls, with many tourists shaping a vacation around a particular sporting interest. The natural beauty and geography of the area, as well as our promotional visibility provide an ideal location for everything from prestigious tournaments to fun and exciting family events. In addition to the sampling of events below, Niagara is well known for:

- world class golf courses of all levels open to the public
- peaceful and scenic fishing sites along the many creeks and rivers in the area
- sailing and water sport opportunities
- breathtaking, challenging mountain bike and hiking trails (i.e. - Bruce Trail)
- family recreation trails for walking, running, roller-blading, and leisurely biking
- numerous cross country skiing routes
- sports tournaments for all levels



Sample of Sporting Events in Niagara Falls

Sporting Event	Features	Season
Casino Niagara International Marathon	Marathon, half marathon, in-line marathon, friendship run, (all taking place along a beautiful Parkway route), and runners' expo	Fall
Provincial/National Slo-Pitch Championships	Hundreds of teams in different divisions compete throughout September for Provincial and/or National Championships - frequently held in Niagara Falls.	Fall
Vineyard Cycle Tour and Challenge	25km, 50km, and 65km cycle tours of Niagara's beautiful wine country	Spring

Source: City of Niagara Falls event listings at:
http://www.niagarafalls.ca/about_niagara_falls/events_calendar/index.asp

Tourism Employment in the Niagara Region

Year	Total Tourism Employment	Percentage of Total Employment
1996	20,062	15.8 %
1997	30,880	19.1 %
2002(medium projected)	44,259	22 %

Source: Niagara Economic and Tourism Corporation, Niagara Canada's Tourism Industry Report Highlights , Summary of Findings and Highlights - Niagara Tourism Investment Opportunities, Economic Impact Analysis of Tourism Development in the Niagara Region 1996, 1997, 2002 or visit:
<http://www.niagaracanada.com/documents/reports/tourismreporhighlights.pdf>

Year	Total Tourism Employment	Percentage of Total Employment
2001	38,538	20.3 %
2002	39,015	20.2 %
2007(medium projected)	49,321	22 %

Source: Niagara Economic and Tourism Corporation, Economic Impact Analysis of Tourism Development in the Niagara Region 2001, 2002 and projections to 2007 or visit:
http://www.niagaracanada.com/documents/reports/TEAM_Hermus_REPORT_2003.pdf

Tourism Activities

Once again, the strategic development of a complete tourism offering is producing great results for Niagara Falls. Many investors and tourists alike are pleasantly surprised to learn of the diverse range of activities in the City. Visiting the spectacular Niagara Falls may be the cornerstone of many vacations, but countless other activities will keep tourists busy for their entire stay.

Exhibit 12: 10 Main activities participated in during trips by all visitors to Niagara area

Tourist Activity	Total Number Participating (000's)					
	Canadians (number)	Canadians (%)	Americans (number)	Americans (%)	Overseas (number)	Overseas (%)
Sightseeing	1299	56	1041	17.6	620	85.3
Visiting Friends/Relatives	930	40.1	245	4.1	227	31.2
Shopping	509	21.9	922	15.6	552	75.9
Participating in sports activities	474	20.4	355	6.0	113	15.5
Walking/hiking	236	10.2	-----	-----	-----	-----
Visiting Historical Sites	232	10.0	-----	-----	-----	-----
Visiting Theme Parks	208	9.0	133	2.2	131	118.08
Swimming	163	7.0	267	4.5	76	10.5
Visiting National Parks	147	6.3	742	12.5	398	54.7
Visiting Museums	143	6.2	-----	-----	-----	-----

Source: *Cities Report, 1997*

The Opportunities

The Future of Niagara

Niagara Falls tourism is developing at a blistering pace. Long time investors, as well as new players in this lucrative market are understanding more and more the potential for success in Niagara Falls.

By strategically fostering the expansion of the diverse hospitality and attraction industries, the City is encouraging a larger number of visitors to come to the City, to stay longer, and to spend more money while here - all specific objectives described in the City's strategic vision. Aspects such as appropriate locations, the careful planning of the City's skyline, and the welcoming of well recognized hospitality brand names to the city will all help Niagara Falls maintain a prosperous and dignified tourism industry.

*Source: 2003 New Developments Booklet - City of Niagara Falls Website at:
http://www.niagarafalls.ca/business/new_developments/index.asp*

Niagara Fallsview Casino Resort

A partnership between the City of Niagara Falls and the Ontario Lottery and Gaming Corporation has paved the way for the \$1 billion Casino Resort - scheduled for occupancy Spring 2004 in the booming Fallsview District. The Hyatt-managed hotel will be a significant element of the development, but it will be matched by a major casino, entertainment space, and a retail facility that will encourage substantial tourism growth. The multi faceted site will include:

- 130,000 sq. ft of gaming space
- 368 room Hyatt Regency Hotel
- 120,000 sq. ft of prominent retail/entertainment facility
- health spa
- 1,500 seat theatre
- 30,000 sq. ft. meeting/conference space

For up to date information, construction time-lines, and live footage of casino site construction, visit Falls Management Company's website at:

<http://www.fallsmanagement.com>

or visit Discover Niagara website for the Niagara Fallsview Casino Resort at:

<http://discoverniagara.com/fallsviewcasino/main/index.php>

Major Tourism Investors in Niagara Falls

Hotels/Accommodations

Hilton Hotels
 Marriott and Courtyard Marriott
 Sheraton
 Ramada
 Howard Johnson
 Embassy Suites
 Great Wolf Lodge
 DoubleTree (Hilton)
 Radisson
 Days Inns
 Clarion

Restaurants

Outback Steakhouse
 Tony Roma's - Famous for Ribs
 Rainforest Café
 T.G.I. Friday's
 Applebee's
 Kelsey's
 Wolfgang Puck
 The Keg
 Boston Pizza
 Ruby Tuesday
 Hooters

Retail

Polo Ralph Lauren	Levi's	National Geographic
Coca Cola Store	Hershey Store	Tommy Hilfiger
Guess	Nike	Reebok
Liz Claiborne	Sport Chek	Wal-mart
Zellers	Home Depot	World Wrestling Entertainment - WWE
Marvel Comics	Canadian Tire	Mark's Work Wearhouse

Attractions

Ripley's Aquarium (opening 2008)	Ripley's - Louis Tussaud's Wax Museum (opened 2005)	Ripley's Believe It or Not! Museum - Renovated Spring 2004
Marineland's Arctic Cove and new rides	Niagara Falls People Mover	Great Canadian Midway, Clifton Hill Redevelopment

Source: New Developments at:
http://www.niagarafalls.ca/business/new_developments/index.asp

For a more detailed list of businesses in Niagara Falls, visit our online business directory at:
http://www.niagarafalls.ca/business/business_directory/index.asp,

or visit <http://www.niagarafallstourism.com>

Investing in Niagara

Niagara Falls' favourable investment climate includes competitive land rates, high traffic flows and overall visibility, a central geographic location, and lower operating and overhead costs.

Niagara also boasts a large, well trained tourism workforce that comprises over 20% of the area's total workforce.

The City of Niagara Falls will grow tourism through continued investment in infrastructure and public services, sound advertising and marketing programs, and further strengthening of the special events and festival offering - smoothing out the seasonal ups and downs.

With opportunity for new attraction, entertainment and retail investment, now is the time to consider Niagara Falls.

For a comprehensive report on Tourist and Economic Statistics for the City of Niagara Falls, visit:

http://www.niagarafalls.ca/business/business_profile/tourism_economic_impact_statistics.asp

and for a Virtual Tour of Niagara Falls Developments visit:

http://www.niagarafalls.ca/business/new_developments/index.asp

Niagara Falls Tourism

Niagara Falls Tourism (NFT) is the destination management organization for the City of Niagara Falls. The organization is membership driven and develops and implements a strong and effective tourist destination marketing program.

Strengthening the Niagara Falls brand in the key markets in cooperation with our tourism partnership alliances is the key to the success of NFT. Well established partners include private stakeholders, Ontario Ministry of Tourism & Recreation and the Canadian Tourism Commission.

In February 2004, Niagara Falls Tourism held its 2004 Annual General Membership Meeting, and cited the following plans for 2004:

- Expanded effort in Media Relations
- a new fully integrated Spring/Summer Program (in partnership with the Province of Ontario)
- a new Fall/Winter Campaign focused on traditional, core, volume markets
- Niagara Falls Tourism working with interested stakeholders will be reviewing their event marketing strategy to ensure that supported events are effective, relevant and efficiently presented
- Niagara Falls Tourism is considering a new information centre service operation that would be located on Fallsview Boulevard in the new Niagara Fallsview Casino Resort Complex
- Niagara Falls Tourism and Niagara Economic and Tourism Corporation will jointly publish a single annual visitor guide, which will increase distribution, coordinating efforts, and saving stakeholders hundreds of thousands of dollars by eliminating the need to purchase advertising in two different visitors guides

Niagara Falls Tourism's Plans for 2004 - Travel Trade:

- Niagara Falls Destination Planner - NFT will add to the existing format an accommodation/conference facility grid listing page(s), more suggested itineraries, and new experiential editorial
- Student & Youth Group Destination Piece - NFT will develop a full-colour brochure specific to the student and youth travel market.
- National Tour Association (NTA) Marketplace - During 2004 NTA being held in Toronto, Niagara Falls Tourism will co-sponsor numerous events and familiarization trips.
- Courier Magazine/Destinations Magazine -NFT to work with OTMP and members regarding an Ontario cooperative advertisement in the May, July and/or Oct 2004 issue(s) of Courier Magazine and Destinations.
- Travel Trade Shows for 2004 - NFT will attend 18 Travel Trade Shows in 2004 including two new shows": Bank Travel' (Feb) pre-scheduled appointments with Bank Club Directors and Travel Connections (Aug) an invitational marketplace designed for travel industry suppliers; group leaders, motorcoach operators and tour operators of Western Pennsylvania.
- French or Multi-Lingual Lure Brochure - currently researching the feasibility of developing a brochure designed specifically for the French market or a multi-language lure brochure.

Niagara Falls Tourism's Plans for 2004 - Meeting Conventions & Incentive Travel:

- Promotional Material - NFT will invest in new promotional material to further promote the destination to potential and existing corporate clients. These are a one-page profile sheet, post cards, trade show shirts and calculator business card holders with company logo and web site.
- Corporate Sales Missions - NFT will organize Niagara sales mission blitz's in Toronto with follow up FAM tours. Partners will have an opportunity to sell Niagara as the meetings and conventions destination to potential clients and make a group destination presentation and network with select groups of qualified meeting planners.
- MC&IT Website - NFT has initiated the creation of a web site dedicated to the MC&IT market.
- Educational Sales Calls - Niagara Falls Tourism will organize educational sales calls within the GTA. The objective is to re-educate meeting planners and Destination Marketing Companies on Niagara and what is new.
- MC&IT Trade Show- Brochure Distribution Program - NFT will be represented at 11 qualified mc&it tradeshow's in 2004.

For further details, contact:

Niagara Falls Tourism
5515 Stanley Ave.
Niagara Falls, ON L2G 3X4
905-356-6061
<http://www.niagarafallstourism.com>

Tourism Highlights

Niagara Tourism Highlights

- More than 17 million visitors will spend over \$2.1 billion in the Niagara Region annually
- in 2002, 14.2 million visitors spent \$1.8 billion in Niagara
- Up to \$ 6 billion in forecasted capital expenditures by 2002 for infrastructure upgrades, luxury hotels and the Niagara Gateway Casino
- More than \$2.8 billion worth of investment opportunities over the next 20 yrs.

For further Statistics on Niagara Tourism and its investment opportunities, visit:

<http://www.niagaracanada.com>

or visit the 2003 Advantage Niagara Tourism Investment Update at:

http://www.niagaracanada.com/documents/reports/Tourism_Investment_2003.pdf

Ontario Tourism Highlights

- In 2001, tourism employment in the Province of Ontario represented 4.4% of Ontario's employment with 261,700 jobs
- In 2001, tourism was Ontario's 7th largest export industry, bringing into the province \$7.3 billion in foreign exchange, and provides 3.2% of Ontario's total exports.
- In 2001, Ontario's tourism industry accounted for \$19.4 Billion (Total Tourism Receipts), which is 4.4% of the provincial GDP.

For further Tourism Facts in the Province of Ontario, visit:

<http://www.tourism.gov.on.ca/english/tourdiv/research/index.html>

or visit, the Ontario Ministry of Tourism and Recreation, Tourism Investment in Ontario website at:

<http://www.2ontario.com/tourism/>

National Tourism Highlights

- In 2002, total tourism spending in Canada reached \$51.8 billion, up 0.3% from 2001.
- in 2002, Canadians accounted for 66% or \$34.0 billion while foreigners spent \$17.8 billion or 34%
- In 2002, Total tourism Gross Domestic Product (GDP) reached \$23.0 billion or 2.0% increase over 2001
- In 2002, foreigners made 20.0 million overnight trips to Canada, a 2.0% increase over 2001
- In 2002, Americans took 16.2 million trips or 3.8% additional trips compared to a 5.3% decrease by overseas residents
- In 2002, Canada's international travel account deficit, was at 1.9 billion. For the first time, the deficit with the United States was lower than the deficit with the overseas countries.

For further Statistics and Market Research studies, visit the Canadian Tourism Commission website at:

<http://www.canadatourism.com/ctx/app/en/ca/statsfigures.do>

Tourism Related Contacts

Business Development Department

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The Niagara Parks Commission

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