



**City of Hamilton**  
**MAYOR'S TASK FORCE ON ECONOMIC RECOVERY**  
**AGENDA**

**Meeting #:** 20-005  
**Date:** September 25, 2020  
**Time:** 8:30 a.m.  
**Location:** Due to the COVID-19 and the Closure of City Hall

All electronic meetings can be viewed at:

City's Website:

<https://www.hamilton.ca/council-committee/council-committee-meetings/meetings-and-agendas>

City's YouTube Channel:

<https://www.youtube.com/user/InsideCityofHamilton> or Cable 14

Loren Kolar, Legislative Coordinator (905) 546-2424 ext. 2604

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**1. APPROVAL OF AGENDA**

(Added Items, if applicable, will be noted with \*)

**2. DECLARATIONS OF INTEREST**

**3. APPROVAL OF MINUTES OF PREVIOUS MEETING**

3.1 August 25, 2020

**4. COMMUNICATIONS**

4.1 Correspondence from Ian Borsuk, Hamilton Transit Alliance, respecting the viability and growth of public transit

Recommendation: Be Received.

- 4.2 Correspondence from the Hamilton2026 Commonwealth Games Bid Corporation respecting relating the economic impacts expected from the hosting of the 2026 Commonwealth Games

Recommendation: Be Received.

**5. CONSENT ITEMS**

- 5.1 Panels and Discussions Update (no copy)

- 5.2 Working Group Updates (no copy)

- 5.3 Workforce Planning Hamilton – Restart and Recovery Survey Results (no copy)

**6. STAFF PRESENTATIONS**

**7. DISCUSSION ITEMS**

**8. MOTIONS**

**9. NOTICES OF MOTION**

**10. GENERAL INFORMATION / OTHER BUSINESS**

**11. PRIVATE AND CONFIDENTIAL**

**12. ADJOURNMENT**



## Hamilton

### **MAYOR'S TASK FORCE ON ECONOMIC RECOVERY**

#### **MINUTES 20-004**

**Tuesday, August 25, 2020**

**8:30 a.m.**

**Council Chamber**

**Hamilton City Hall**

**71 Main Street West**

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**Present:** Mayor F. Eisenberger  
Councillors N. Nann; J.P. Danko  
R. McKerlie, President of Mohawk College (Chair)  
M. Afinec, President & COO of Business Operations, Hamilton Tiger-Cats & Forge FC  
F. Bernstein, Executive Director, Workers Art & Heritage Centre  
K. Duffin, President and CEO, Amity Goodwill  
M. Ellerker, Business Manager, Hamilton-Brantford Building & Construction Trades Council (Building/Skilled Trades Sector)  
P. Hall, Executive Director, Stoney Creek Chamber of Commerce  
K. Jarvi, Executive Director, Downtown Hamilton BIA  
T. Johns, Board Member, West End Home Builders' Association (Vice-Chair)  
L. La Rocca, Director of Operations, Sonic Unyon Records  
K. Loomis, President & CEO, Hamilton Chamber of Commerce  
B. Lubbers, General Manager, Courtyard by Marriott  
A. Marco, President, Hamilton & District Labour Council  
R. McCann, Founder, Clearcable Networks  
B. Munroe, Blacktop Recess  
M. Patricelli, Executive Director, Flamborough Chamber of Commerce  
C. Puckering, President and CEO, Hamilton International Airport  
D. Spoelstra, Chair of Agriculture & Rural Affairs Committee  
J. Travis, Executive Director Workforce Planning Hamilton  
H. Wegiel, Director of Government and Trade Relations ArcelorMittal Dofasco  
G. Yuyitung, Executive Director of the McMaster Industry Liaison Office

**Absent with**

**Regrets:** Councillor T. Whitehead – Personal  
R. Brown, Manager, Westfield Heritage Village  
E. Dunham, Owner, The Other Bird  
T. Shattuck, Chair, Synapse Life Science Consortium, McMaster Innovation Park

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**MAYOR'S TASK FORCE ON ECONOMIC RECOVERY MEETING 20-003 OUTCOMES:**

**1. Correspondence from Stephanie Goulet respecting Financial Assistance for Independent Music Venues (Item 4.1)**

**(Eisenberger/Loomis)**

- (a) That Correspondence from Stephanie Goulet respecting Financial Assistance for Independent Music Venues, be received; and,
- (b) That Correspondence be sent to the Federal and Provincial Ministers of Finance requesting support for the Music Industry Sector and Independent Music Venues.

**CARRIED**

**FOR INFORMATION:**

**(a) CHANGES TO THE AGENDA (Item 2)**

The Clerk advised the Task Force of the following changes to the agenda:

**ITEM WITHDRAWN:**

- 7.1 Proposed Correspondence from the Mayor's Task Force on Economic Recovery Respecting Role of Liability in the Economic Recovery (deferred from the July 30, 2020 meeting)

The Workplace and Office Working Group advised that they wished to withdraw the item as they were not able to gain consensus on wording of the letter.

**(Nann/Patricelli)**

That the agenda for the August 25, 2020 meeting of the Mayor's Task Force on Economic Recovery, be approved, as amended.

**CARRIED**

**(b) DECLARATIONS OF INTEREST (Item 2)**

There were no declarations of interest.

**(c) APPROVAL OF MINUTES OF PREVIOUS MEETING (Item 3)**

**(i) July 30, 2020 (Item 3.1)**

**(Eisenberger/Marco)**

That the Minutes of the July 30, 2020 meeting of the Mayor's Task Force on Economic Recovery, be approved, as presented.

**CARRIED**

**(d) CONSENT ITEMS (Item 5)**

**(i) Working Group Updates (Item 5.1)**

Members of the Working Groups of the Task Force provided updates on their work up to now.

**(Ellerker/Loomis)**

That the Working Group Updates, be received.

**CARRIED**

**(ii) Panels and Discussions Update (Item 5.2)**

M. Anthony and J. Travis addressed the Task Force respecting two of the recent Panels that focused on the Frontline Worker Experience.

**(Bernstein/Ellerker)**

That the Panels and Discussions Update, be received.

**CARRIED**

**(e) GENERAL INFORMATION / OTHER BUSINESS (Item 11)**

**(i) Resources for the Members of the Mayor's Task Force on Economic Recovery Update (Item 10.1)**

Carrie Brooks-Joiner, Director, Tourism and Culture, addressed the Task Force respecting an Update on Resources for the Members of the Mayor's Task Force on Economic Recovery. Sector Participants are advised to send documents for uploading to the Resources Page to the Legislative Coordinator.

**(Johns/Yuyitung)**

That the Resources for the Members of the Mayor's Task Force on Economic Recovery Update, be received.

**CARRIED**

**(f) ADJOURNMENT (Item 11)**

**(Johns/Yuyitung)**

There being no further business, the Mayor's Task Force on Economic Recovery be adjourned at 10:15 a.m.

**CARRIED**

Respectfully submitted,

Ron McKerlie, Chair  
Mayor's Task Force on Economic  
Recovery

Loren Kolar  
Legislative Coordinator  
Office of the City Clerk

For the consideration by Mayor's Taskforce on Economic Recovery

I am writing today on behalf of the Hamilton Transit Alliance. The Hamilton Transit Alliance (HTA) is a coalition of local organisations within the City of Hamilton who all agree on the importance of reliable and accessible public transit, and push for improvements and expansion of public transit within the city to achieve the social, economic and environmental benefits it brings to Hamilton. Our coalition has for two years now been advocating for continued investment in Hamilton's public transit service and infrastructure - and within the context of the pandemic we strongly believe that transit resilience is as important as ever.

While ridership has suffered globally, it's vitally important that we all appreciate and understand that as COVID-19 is overcome, Hamilton must be in a position to expand and increase our public transit ridership beyond the current "floor" that we are experiencing now with essential workers (many of whom are working class, women, and racialized). If decisions are not made today to ensure that the HSR is ready to regain ridership, and to encourage workers to travel sustainably around our community, the City will fail to achieve its climate emergency greenhouse gas emission reduction goals, and we will see increases in air pollution and traffic congestion. If we miss our opportunity to ensure that Hamilton's public transit system recovers in tandem with the rest of the economy, not only will we be hindering the economic recovery of Hamilton, but we will be doing a disservice to our children and all future generations of Hamiltonians.

During the pandemic the Hamilton Transit Alliance and its individual members have called on both the federal and provincial governments to provide sustained emergency funding for the HSR. While this emergency funding has been provided, the pandemic has underscored how vulnerable municipal public transit systems are when a crisis hits because of the lack of on-going operational funding from the provincial government. Additionally, the Hamilton Transit Alliance continues to support the use of promised provincial B-Line LRT funding for transit infrastructure only.

Centering the viability and growth of public transit in your decisions and recommendations is vital to the economic recovery of Hamilton, both in the immediate short term as we overcome the pandemic - but also in the long term as we continue to grapple with the climate emergency and work towards building a truly resilient city.

Thank you for your service to the City of Hamilton and for your consideration,

- Ian Borsuk, Climate Campaign Coordinator, Environment Hamilton  
Facilitator for the Hamilton Transit Alliance (iborsuk@environmenthamilton.org)

The Hamilton Transit Alliance's full membership includes: ATU 107, Hamilton ACORN, Hamilton Centre for Civic Inclusion, Hamilton Chamber of Commerce, Hamilton District Labour Council, Disability Justice Network of Ontario, Environment Hamilton, YWCA Hamilton, McMaster Student Union, Social Planning Research Council, Immigrants Working Centre, and Neighbour 2 Neighbour.



**Hamilton2026 Commonwealth Games Bid Corporation**  
77 James Street North Suite 300 Hamilton, Ontario Canada L8R 2K3  
www.hamilton2026.ca

September 16, 2020

Mr. Ron McKerlie  
President of Mohawk College and  
Chair of the Mayor’s Task Force on Economic Recovery  
c/o Mohawk College  
135 Fennell Avenue West  
Hamilton, ON L89C 0E5

Dear Mr. McKerlie:

I am writing further to my email to you of July 5 referencing the intention of the Hamilton 2026 Commonwealth Games Bid Corporation to make a submission to the Mayor’s Economic Task Force relating to the economic impacts expected from the hosting of the 2026 Commonwealth Games. I am now pleased to attach an independent analysis completed by PWC detailing their assessment of the stimulative/recovery impacts expected from the combination of the proposed and budgeted venue (stadia) plan and Games operations. As reflected in the report, its authors conducted interviews of representatives of the region’s key anchor institutions including the City, which is familiar with PWC’s work in this regard, in order to ensure an understanding of the region’s existing priorities and strategies in the completion of their work.

It is important to note, as reflected at page 11 of the document excerpted below, that this report (which is but one phase of our efforts) does not include impacts associated with our proposed legacy affordable housing plan or those arising from a variety of other facets of the Games as reflected in the captioned excerpt.

These estimates are based **purely on the capital investments and operating activities** needed to stage the Games, and at this stage, **do not include other potential economic impacts** such as:

- Spending by **visitors, athletes and officials during the Games** or any longer-term **boost to tourism**.
- The **new build construction of an athletes and officials village**, which would be converted to affordable housing after the Games.
- **Savings to the Municipal budget** due to Games-related capital expenditure and the assumption of future operational costs to run venues.
- Unlocking of **federal or provincial funding for investment** in wider Games and non-Games infrastructure, such as transportation.
- Catalytic effects **on trade or foreign investment** resulting from Hamilton’s increased profile on the World stage and direct connections with the Commonwealth Family.
- Greater ability to attract **domestic private sector investment** due to the enhanced brand, infrastructure and built environment in Hamilton.

Future phases of this study will be designed to develop **monetary estimates for these additional categories to gain a fuller picture of the impact of the Games**.

We feel that our proposed Hosting Plan, when publically released in the coming days, will be seen as materially adding to your committee’s efforts to develop an action plan to position the City of Hamilton for long term, sustainable and equitable economic recovery that touches on all of the seven working group verticals encompassed by your mandate in one integrated initiative that:

- is intended to immediately align with and integrate with municipal, provincial and federal recovery priorities (especially in housing) making it a public/private tool kit purposed to our region’s immediate needs; and





## Hamilton2026 Commonwealth Games Bid Corporation

77 James Street North Suite 300 Hamilton, Ontario Canada L8R 2K3  
www.hamilton2026.ca

- is being curated (without bid costs or competition) to not only avoid negative impacts on the municipal budget but to strengthen that budget.

Beyond the report attached, we have commissioned a supplementary study of the anticipated impacts of our proposed housing plan – which will be our primary legacy deliverable in these Games. The scope of that report is set out in the attached document.

Lastly, I would draw your attention to this note on p 11 of the report which confirms the anticipated range of municipal commitment anticipated in advancing the Games and unlocking these impacts based upon the approach of all levels of government to the Pan Am Games (which we expect will prevail here):

**The events also drew in significant federal and provincial funding to Toronto and Hamilton, with municipalities only contributing an estimated 12% of the total capital and operating budget of the Games.**

Sources: "Pan Am gold medal soccer game in Hamilton sold out", Toronto.com, March 2, 2015.  
"City wins overall after Pan Am Games: report", The Hamilton Spectator, November 27, 2015. "Special Report, June 2016", The Office of the Auditor General of Ontario

In our view, the cumulative impacts of this effort, coupled with the very considerable dividend multiple expected through the contributions of senior levels of government and the private sector (investments not otherwise available to Hamilton in the absence of the Games) makes this a compelling and unprecedented opportunity for recovery and regeneration immediately actionable by this community.

In the event that your committee would wish a delegation presenting these results and our perspective on the Games pandemic recovery impacts generally, we would welcome that invitation.

We have copied Richard Snook of PWC as primary relationship partner.

Sincerely,

A handwritten signature in blue ink, appearing to read "Louis A. Frapporti", written over a light blue horizontal line.

Louis A. Frapporti  
Chair  
HAMILTON2026

c: Richard Snook, *PWC Canada*  
Carrie Brooks-Joiner, *City of Hamilton*  
Loren Kolar, *City of Hamilton*

# Hamilton 2026 preliminary impact study: Games stadia and operations

Hamilton 2026 Commonwealth Games Bid Corporation

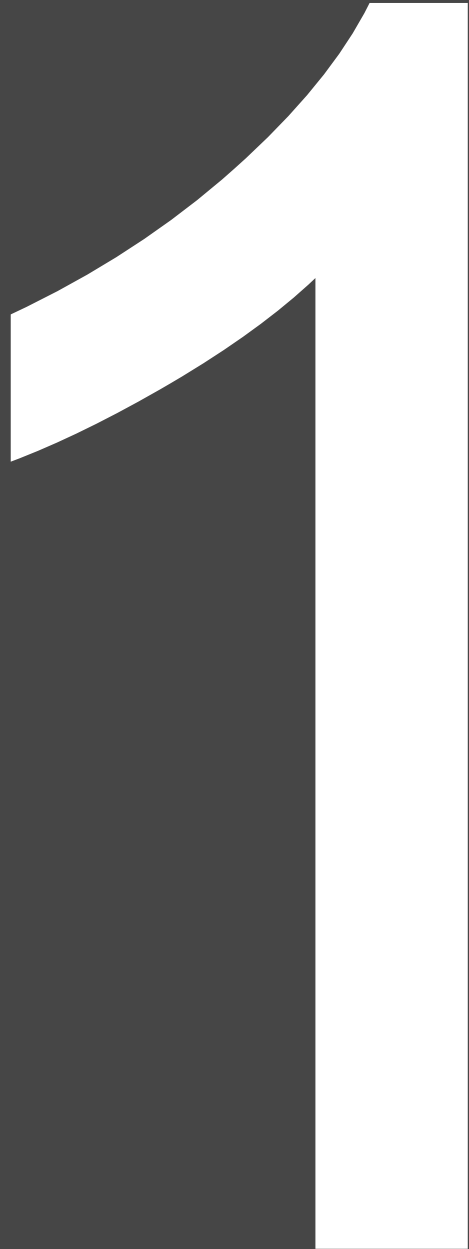
September 2020



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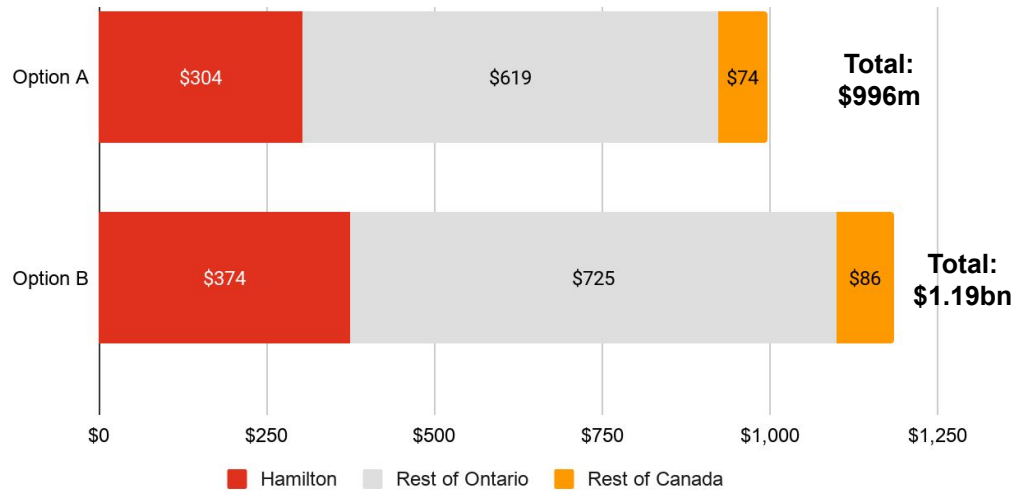




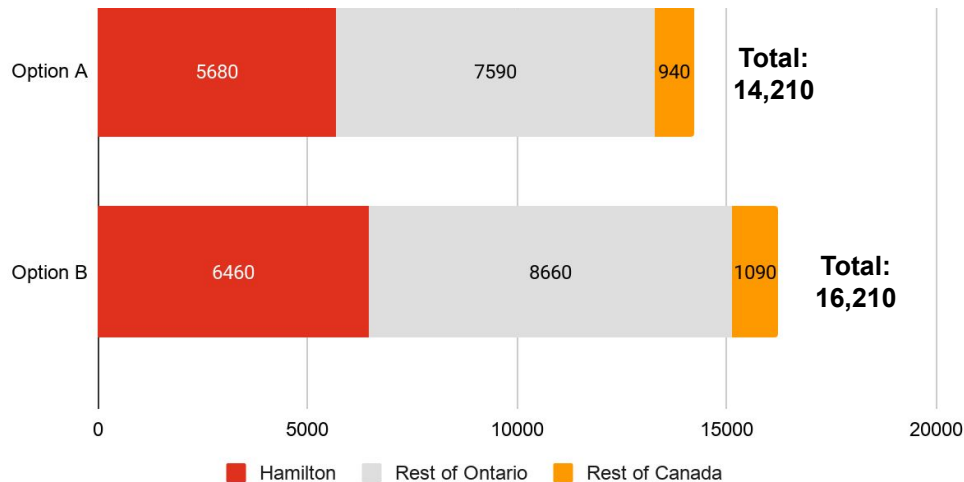
# Summary of key findings

# Investment in stadia and operation of the Games alone could create an economic footprint of up to \$1.19bn in Canada

**GDP Impact, cumulative value between 2021 and 2026 (\$ million)**



**Jobs Impact, total person years of employment between 2021 and 2026**



We have developed two scenarios which estimate the impact of the The Commonwealth Games on the economy, based on the latest available Games budget estimates (Options A and B). These show that:

- Games operations and investments in stadia and venues could create an economic footprint in Canada of between \$996m and \$1.19bn based on direct, indirect and induced impacts. This would also support between 14,210 and 16,210 person years of employment between 2021 and 2026. Over 90% of this footprint is expected to be in Ontario.
- Within Hamilton, we estimate that the Gross Domestic Product (GDP) footprint of the Games could be between \$304m and \$374m, in addition to between 5,680 and 6,460 person years of employment. To the extent possible, we understand that in hiring and in the awarding of contracts, preference will be given to local constituents and businesses, which has the potential to increase this initial estimate of local impact.

These estimates are based **purely on the capital investments and operating activities** needed to stage the Games, and at this stage, **do not include other potential economic impacts** such as:

- Spending by **visitors, athletes and officials during the Games** or any longer-term **boost to tourism**.
- The **new build construction of an athletes and officials village**, which would be converted to affordable housing after the Games.
- **Savings to the Municipal budget** due to Games-related capital expenditure and the assumption of future operational costs to run venues.
- Unlocking of **federal or provincial funding for investment** in wider Games and non-Games infrastructure, such as transportation.
- Catalytic effects **on trade or foreign investment** resulting from Hamilton's increased profile on the World stage and direct connections with the Commonwealth Family.
- Greater ability to attract **domestic private sector investment** due to the enhanced brand, infrastructure and built environment in Hamilton.

Future phases of this study will be designed to develop **monetary estimates for these additional categories to gain a fuller picture of the impact of the Games**.

Note: all monetary values are expressed in constant 2020 Canadian dollars unless otherwise stated, figures may not sum due to rounding

# The Games are expected to unlock additional benefits for Hamilton across housing, tourism, transport and the City budget



## Affordable housing

These Games are focused on creating a legacy of affordable housing in Hamilton. This will arise from the development of an athletes and officials village.

Over 10,000 athletes, officials, team members and staff will need to be accommodated for the Games. Efforts are underway with stakeholders already invested in solving the affordable housing challenges in Hamilton to leverage the Games to help address the housing shortage in the region. These efforts build on existing government programs and incentivising significant private sector investment and support.

The additional housing capacity will also help Hamilton to reach its population growth targets.



## Municipal budget

Current plans from the Commonwealth Games Bid Corporation do not seek new financial commitments from the City for infrastructure funding, focusing instead on identifying and purposing existing capital commitment and soliciting senior government support, in addition to having the highest proportion of private sector investment of any recent Games. The intention is that the Games will provide a net financial benefit to the City.

Games-related capital investment will build, enhance or repair community infrastructure, reducing the need for the City to do so, and driving savings. After the Games, many key venues will either be operated by the private sector or maintained by dedicated endowment funds. The City therefore is not expected to bear major legacy costs, but will reap benefits from greater economic activity and a broader tax base.

Previous editions of the Games have seen the economic boost significantly exceed the total public funding (municipal, provincial, and federal) by a factor of up to 3.25. Local or municipal governments tend to provide around 20-30% of total public sector funding. In Hamilton's case, as private sector investment is intended to represent the majority of the municipal share, the Municipal Government return on investment may be substantially higher.



## Tourism

The Games will enhance Hamilton's built environment and showcase it to a global audience of around 1.5bn people\*. Tourism is likely to see a significant boost from visitors during the Games and in the future due to Hamilton's higher profile.

Enhanced infrastructure will enable Hamilton to host future elite and mass participation sporting events, which will also act as a draw to tourists.

Manchester and Glasgow experienced enduring boosts to tourism, with visitor numbers up by around a third in the three years following the Games.



## Transport infrastructure

The Games may accelerate desired investment in transportation infrastructure, including improvements to roadways.

The Games can also be the catalyst to creating a more environmentally-sustainable Hamilton. This would include pedestrianized boulevards and investment in bicycle lanes.

Both these factors will help the City to deliver on its targets of boosting the share of trips to 15% for walk/cycle and 12% for transit. Similarly, this will support the City in meeting its objective to reduce greenhouse gas emissions to net zero by 2050.

# The Games are also expected to boost community and elite sports participation, Hamilton's brand, and trade and investment



## Community sports participation

Past editions of the Games have led to an increase in sports participation. For example, a survey found that 10% of Victorians took up sports as a result of Melbourne 2006.

The Games will provide Hamiltonians with improved sports facilities, which will be accessible to the public after the Games. In partnership with local public health and caregiving institutions, it is hoped that the Games will inspire a multiyear effort to create programs focused on physical activity, health and wellbeing.

The Games should also support a number of the United Nations' Sustainable Development Goals (listed in Appendix C), such as Goal 3: Good Health and Well-Being.



## Brand and profile

Several stakeholders we spoke to felt that Hamilton was often in the shadow of Toronto, and had been less successful at redeveloping its brand than other nearby municipalities like Waterloo. This is manifested through the language commonly used to describe the local geography, often referred to as the "Waterloo-Toronto Corridor".

The opportunities and investments the Games will catalyse, coupled with the national and international profile it generates, are expected to help Hamilton be recognised as a great place to live, work, and play. This directly supports the Municipal Government's objectives.



## Elite sports legacy

The availability of world-class facilities and the prestige of the Games will also make Hamilton more attractive as a base for elite sports people and as a destination for elite sports events.

It is notable that many of Canada's major elite sports programmes are based around Calgary and Vancouver to leverage the facilities built during their respective Olympic Games.

The Games also provide a springboard to host annual anniversary events following the games (for example, in years following the 2012 Olympics, London has hosted the Anniversary Games for athletics and the Ride London event for cycling, which is based on the route used during the Olympics).



## Ongoing trade and investment

Business representatives we interviewed expect that the profile brought about by the Games will boost Hamilton's brand as a Foreign Direct Investment (FDI) destination, and will help businesses based there to enhance their exports. Since the Games encompass one third of the World's population and include countries that are currently targeted by regional economic development for FDI, they can be expected to improve Hamilton's ability to secure trade and investment from around the World.

Following Melbourne 2006, 34% of businesses surveyed said that they had seen or expected to see an export boost as a result of the Games.

The Games should also support UN Sustainable Development Goal 9: Industry, Innovation and Infrastructure.

# 2

## Introduction and background



# This report begins to apply the Commonwealth Games Federation's Value Framework to Hamilton 2026

In 2019, the Commonwealth Games Federation (“CGF”) commissioned PwC to develop a Games Value Framework (illustrated in the diagram opposite) to assess the value of hosting the Commonwealth Games (“The Games”) and to interpret the available evidence from the last five editions of the Games.

In this report, we begin to apply the Value Framework to the potential Games in Hamilton 2026 to provide an independent assessment on the impact of the Games. The scope of this preliminary study does not quantify all aspects of the games; specifically we have:

- Assessed the economic contribution (in terms of GDP and employment) of the capital and operating expenditures associated with hosting the Games (item 1 in the Value Framework). This analysis is based on the latest available budget estimates for the Games.
- Qualitatively described the incremental spending and longer-term impacts (items 2-8 in the Value Framework) Hamilton may benefit from as a result of the Games. This assessment is based on review of the City’s plans for Hamilton, a series of interviews with major institutions in Hamilton, and a review of evidence on the impact of past Games.

It is hoped that subsequent phases of work will further develop and quantify the assessment of items 2-8 on the Value Framework to give a fuller picture of the impact of the Games.

## PwC Commonwealth Games Value Framework

### Spending effects on GDP

1. Direct **Capital** and **operating expenditures** around hosting the Games.
2. **Incremental spending** due to the presence of the Games.

### Longer term impacts

#### Economic









3. **Showcases the city’s** profile as a desirable place to live, work, study and visit.
4. Supports **physical, economic and social regeneration** and **transformation**.
5. **Strengthens trade, investment and tourism** links with other parts of the Commonwealth and the rest of the world.

#### Social

6. **Promotes** community **sports participation** and elite sporting success.
7. **Inspires** community **pride and confidence**.
8. **Catalyzes** communities to adopt **positive behaviours**.

# Our approach applies a four-step process to assessing the potential impact of the Commonwealth Games on Hamilton

Our approach is summarized in the four steps below. The remaining sections of this report describe our findings for each step in turn.

	<b>Set out the socio-economic context</b>	of Hamilton, relative to Toronto, Ontario and the Canadian average	
	<b>Understand Hamilton's vision</b>	for the future in the short, medium, and longer-term through a review of the City's plans and strategies	
	<b>Assess how the Games can help Hamilton to deliver on its ambitions</b>	based on interviews with major institutions in Hamilton and economic footprint analysis	
	<b>Use evidence from the past five editions of the Games</b>	to provide benchmark data on how hosting the Games can impact Hamilton	

# The 2026 hosting plan relative to the 2030 Bid – key differences

Hamilton is a significant part of the Commonwealth Games' history - they hosted the inaugural Games in 1930 with about 400 athletes representing 11 nations across 59 events. Most events occurred at the Ivor Wynne Stadium, former home of the Tiger-Cats CFL team.

Hamilton was originally focused on securing the rights to hosting the 2030 Games in order to celebrate its centenary. The pivot to 2026 is intended to act as a catalyst to assist the region in pandemic recovery, and to create a step change in Hamilton's long-term economic and social outlook.

The shift in timing and focus has led to several alterations in the plans, as illustrated in the table below. The key changes from the 2030 plans to the latest 2026 plans are:

- a reduction in the planned number of athletes and officials;
- a reduction in the planned budget associated with sports infrastructure investments; and
- changes to the number and type of events competed in.

The latest budget figures on which the economic estimates in this report are based are a Games budget for operations and venues of \$0.98bn - \$1.17bn (Option A and Option B respectively). These figures do not include legacy or contingency costs.

We understand from the Commonwealth Games Bid Corporation that current budget plans do not seek new financial commitments from the City for infrastructure funding, focusing instead on identifying and purposing existing capital commitment and soliciting senior government support, in addition to having the highest proportion of private sector investment of any recent Games. The intention is that the Games will provide a net financial benefit to the City.

## Key changes between 2030 bid plans and 2026

	Number of sports events	Number of athletes	Number of coaches and team officials
<b>2026 Bid</b>	18	3,600	1,900
<b>2030 Bid</b>	22	4,500	2,250

Hamilton 2026 preliminary impact study

PwC Note: information based on latest bid plans as at September 2020, any adjustments to the budgeted figures, should they occur, may result in a changes in the results.



# Hamilton 2026 would build upon - but dwarf - prior major sporting events in Hamilton

## 2003 World Road Cycling Championships

Held in downtown Hamilton, this event consisted of a road race and a time trial for five categories of professional cyclists over the course of a week. This was the first time in eight years that this event was held outside of Europe, and, based on visitor numbers at the time, was considered the biggest sporting event Canada ever hosted behind the Olympic Games (Summer 1976, Winter 1988).

It is estimated that over 230,000 people watched the races, including 24,000 out-of-town spectators. Globally, over 250 million people watched the events through TV broadcasts.

The event was funded through grants of \$2.25m from the provincial government, \$10m from the federal government, and \$425,000 from the City.

The economic impacts of this event in Hamilton were estimated to include:

- 527 jobs created, with 410 of them in Hamilton.
- Economic spinoffs of \$31.1m in Hamilton and \$17.2m in the rest of Ontario, including:
  - a total of \$19.7m in direct expenditures
  - the support of \$13.9m in wages
  - the support of \$8.4m in taxes to federal, provincial and municipal governments
- Businesses cleared an estimated \$1.1m in profits from the races.
- Festival events generated \$100k in profits.

Source: "Oct. 6-12, 2003: Hamilton hosts World Road Cycling Championships", The Hamilton Spectator, September 23rd, 2016.

Monetary values are in 2003 Canadian dollars.

Hamilton 2026 preliminary impact study

PwC

## 2015 Pan American Games

Although most events for the Pan Am Games were held in Toronto, Hamilton hosted the soccer competitions at Tim Hortons' field. Eight teams competed in each of the mens' and womens' tournaments. The event was considered a success based on ticket sales, with many Games sold out months in advance of the competition. Some of the key impacts on Hamilton and surrounding areas were reported to include:

- More than 3,000 people from the Hamilton-Burlington-Oakville region applied for volunteering opportunities.
- 131,000 people attended events at the "Hamilton Kicks It Up" cultural celebrations.
- More than 50,000 residents participated in "All Things Pan Am", the program that funded small neighbourhood events surrounding the Games.
- Hamilton Street Railway scheduled 1,120 hours of increased service over the 16 days of the Games.
- Tourism Hamilton's "familiarization tours" during the Games resulted in seven new provincial and national events for the city, carrying an economic impact of \$1.8m.
- Hotel occupancy was up 9.5% overall compared the same period in the previous year, with all hotel rooms in the city sold out for the weekend of the soccer finals.

It was estimated that the Pan Am Games as a whole created 26,000 jobs, supported an economic contribution of \$3.7bn, and drew 250,000 tourists to the Golden Horseshoe.

**The events also drew in significant federal and provincial funding to Toronto and Hamilton, with municipalities only contributing an estimated 12% of the total capital and operating budget of the Games.**

Sources: "Pan Am gold medal soccer game in Hamilton sold out", Toronto.com, March 2, 2015.

"City wins overall after Pan Am Games: report", The Hamilton Spectator, November 27, 2015. "Special Report, June 2016", The Office of the Auditor General of Ontario

Monetary values are in 2015 Canadian dollars.

September 2020

11



# Socio-economic context in Hamilton

# Hamilton is Canada's ninth largest city and sits in its largest conurbation

Hamilton is the ninth largest city in Canada and sits in the Golden Horseshoe area, Canada's largest urban conurbation. Its annual GDP is currently 10th among Canada's Census Metropolitan Areas at \$34.5bn. It has historically been known mainly for its large steel manufacturing industry, and as an important part of the Southern Ontario automotive manufacturing cluster.

Today, it is well known for hosting one of Canada's top universities, McMaster, which is especially acclaimed for its Life Sciences program and its 70+ research centres and institutes on campus, a thriving food and arts scene, and its natural beauty.

Hamilton is Canada's gateway for goods movement. Its strategic location and infrastructure supports all forms of transportation: passenger, eCommerce, heavy/project cargo or commodities. It is one of only a handful of cities across Canada that has all four major transportation modalities within its municipal boundaries – road, rail, air and port.

In recent years, Hamilton has worked hard to foster an identity separate from that of Toronto as an attractive destination for investment, and to enhance its reputation relative to that of the Kitchener-Waterloo region.

## Map of Southern Ontario, Canada



## Canada's largest cities

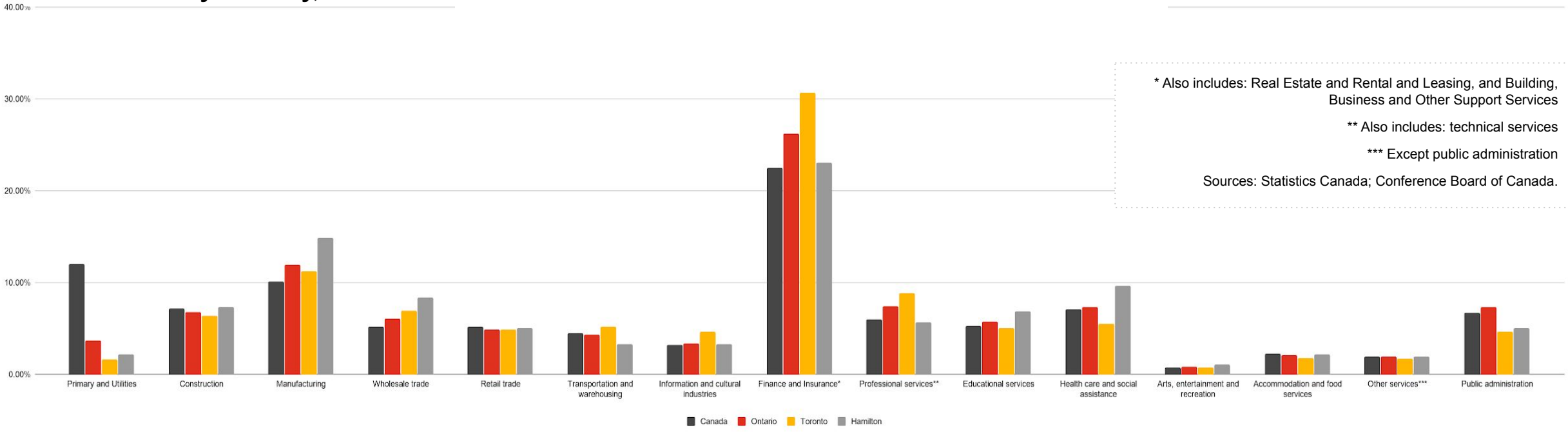
Rank	Geography	2019 population
1	Toronto (CMA), Ontario	6,471,850
2	Montréal (CMA), Quebec	4,318,505
3	Vancouver (CMA), British Columbia	2,691,351
4	Calgary (CMA), Alberta	1,514,723
5	Edmonton (CMA), Alberta	1,447,143
6	Ottawa - Gatineau (CMA), Ontario/Quebec	1,441,118
7	Winnipeg (CMA), Manitoba	844,566
8	Québec City (CMA), Quebec	824,411
<b>9</b>	<b>Hamilton (CMA), Ontario</b>	<b>794,716</b>
10	Kitchener - Cambridge - Waterloo (CMA), Ontario	584,259

Source: Statistics Canada

# Hamilton's economy is more reliant on manufacturing and wholesale trades than other regions

Hamilton is still a manufacturing powerhouse compared to the rest of Canada, and it derives a significantly higher share of its GDP from this sector than other regions in Canada. It is also a major wholesale distribution hub, supported by the strategic location between the Greater Toronto Area and the US border, along with road, rail, and port infrastructure. It recently achieved the status of Most Diversified Economy in Canada, given by the Conference Board of Canada.

### Share of GDP by industry, 2019



\* Also includes: Real Estate and Rental and Leasing, and Building, Business and Other Support Services

\*\* Also includes: technical services

\*\*\* Except public administration

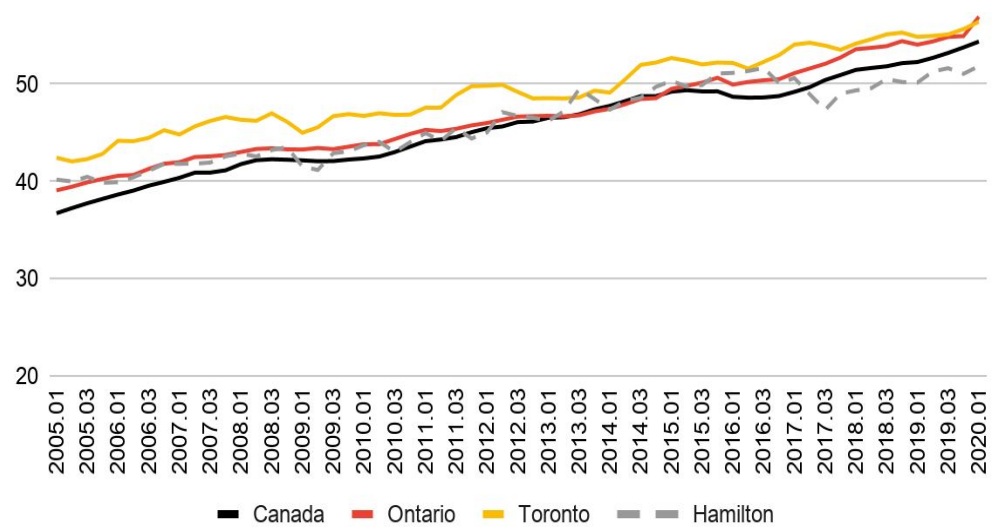
Sources: Statistics Canada; Conference Board of Canada.

# Average income levels in Hamilton fell below the Canadian and Ontario averages in 2017 and have not recovered

Hamilton has been lagging on some socioeconomic fronts in recent years. Average earnings, which for many years tracked close to the Canadian and Ontario averages, fell behind in 2017 and have not recovered since (shown in left chart).

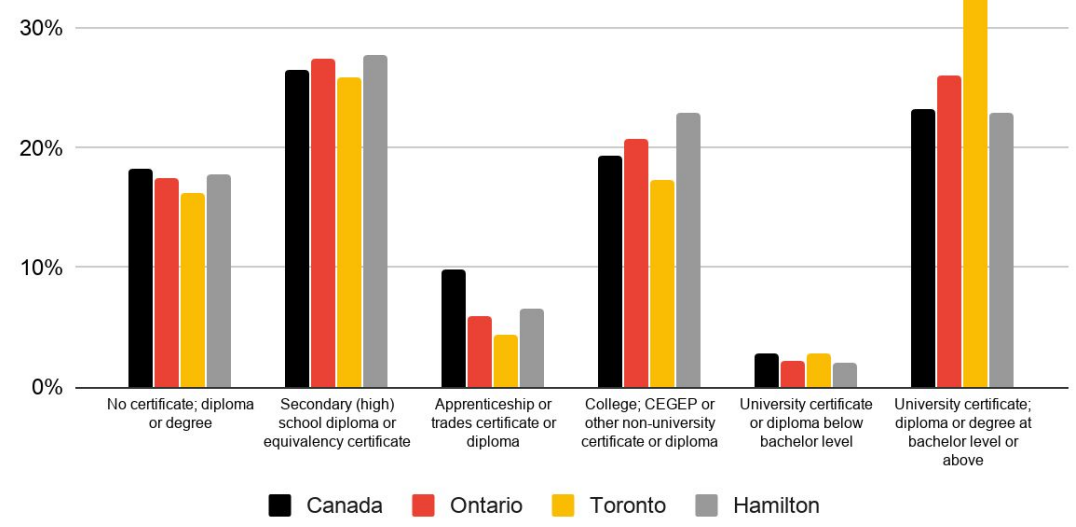
The share of its population with a university certificate or degree is below the Ontario average, and around ten percentage points below that of Toronto (as shown by the far right bars in the chart below). This trend is largely driven by young graduates moving to Toronto and elsewhere in search of higher quality jobs.

### Average wages and salaries per employee, 2005-2020 (\$ '000s)



Source: Conference Board of Canada.

### Highest education attainment, 2016 Census



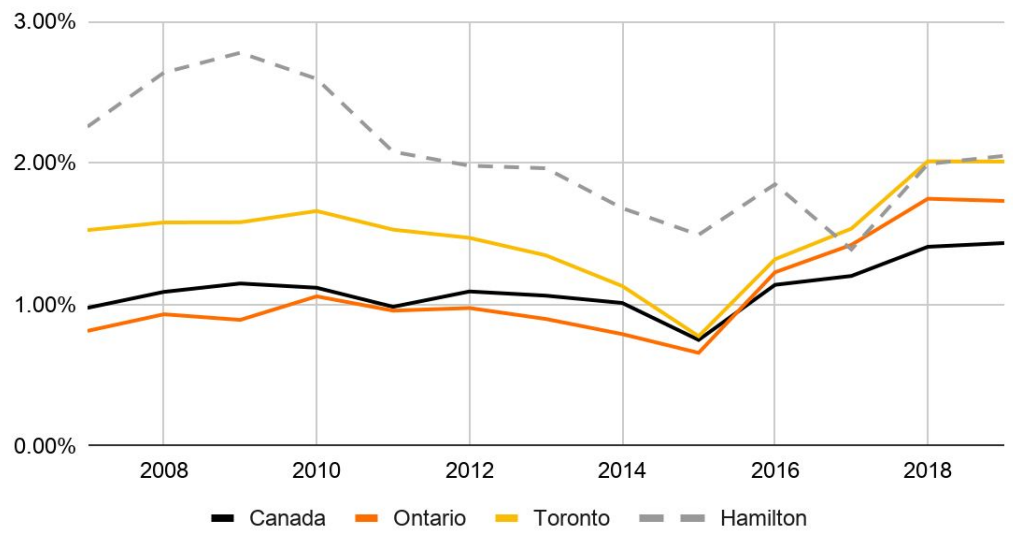
Source: Conference Board of Canada.



# Hamilton has achieved very high levels of population growth, and unemployment remains low

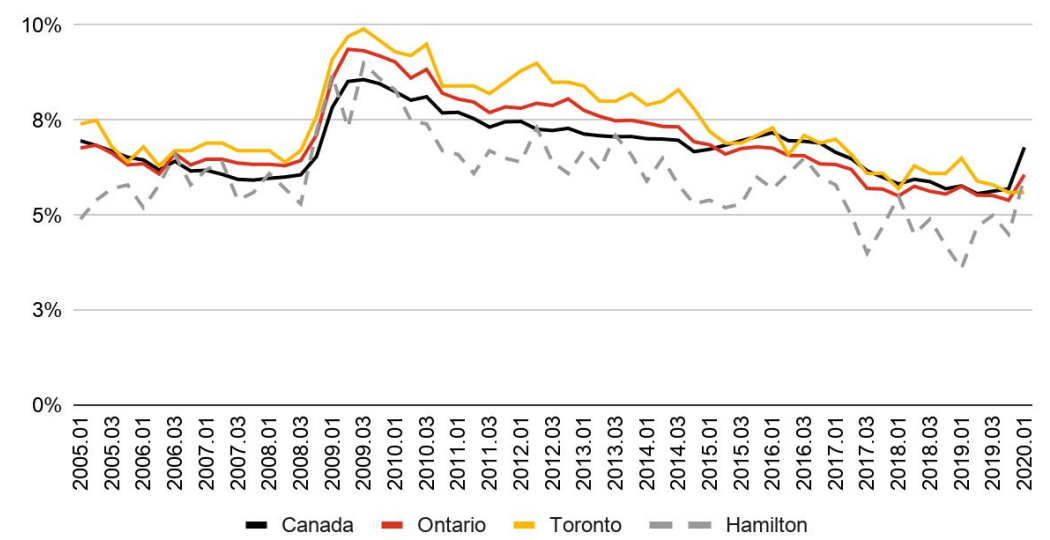
Hamilton has been very successful at attracting new residents to the area, as shown through its population growth rate that has often been double that of the Ontario average, and has also been significantly ahead of Toronto and Canada for much of the last decade, although the gap has narrowed with Toronto in recent years. Hamilton also boasts a lower unemployment rate than the other geographies, although it is as yet unclear what the impact of the COVID-19 crisis will be on these relative levels.

### Growth in population, 2007-2019



Source: Statistics Canada, Census Metropolitan Area level.

### Evolution of unemployment rate, 2005-2020



Source: Conference Board of Canada.

# 4

## Hamilton's vision

# The vision for Hamilton is one of a growing city with strong diverse communities, a vibrant arts and cultural scene, and a growing economy

*"The City of Hamilton's Vision, To be the best place to raise a child and age successfully, and Mission, To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner, acknowledges our diverse community and recognizes that all ages and stages of life play a role in a vibrant community."*

**Mayor Eisenberger, on release of the City of Hamilton's 2016-2025 Strategic Plan**

## Summary of objectives from key stakeholders' published visions for Hamilton

Includes Municipal Government, Chamber of Commerce, Hamilton Economic Development, McMaster Innovation park, McMaster University, and Mohawk College\*

Theme	Summary of vision
People, community engagement and participation	<ul style="list-style-type: none"> <li>• Grow the urban Hamilton population by 110K, or 16.4% by 2041</li> <li>• Foster a sense of pride for the city among residents, driving volunteerism and community-based initiatives</li> <li>• Engage and leverage the community to foster innovation and support entrepreneurship</li> <li>• Leadership in Indigenous education, advance diversity, social inclusion, and increase the international student base</li> </ul>
Economic growth and prosperity	<ul style="list-style-type: none"> <li>• Make Hamilton Canada's top mid-sized city in terms of investment, talent and quality of life</li> <li>• Ensure that residents can find well-paying local jobs, benefiting all residents</li> <li>• Retain the Most Diverse Economy title and have Hamilton be recognized for having the Best Workforce in Ontario</li> <li>• Ensure post-secondary institutions and businesses collaborate with the city, contributing to the economy's success</li> <li>• Equip graduates with entrepreneurial and global competencies and bolster their job readiness</li> <li>• Provide opportunities for research commercialization</li> </ul>
Healthy and safe communities	<ul style="list-style-type: none"> <li>• People lead happy lives in safe, inviting neighbourhoods and friendly communities</li> <li>• Easy access to services and support required to be healthy and active</li> <li>• Ensure 100% of households (25% annually) on the Access to Housing waitlist are assessed by 2023 (there are currently 6,231 households on the social housing waiting list, 68% of these households have incomes less than \$20,000)</li> </ul>

Documents reviewed: Hamilton's City Initiatives and Priority Projects, Hamilton's *Our Future Hamilton*, Hamilton Chamber of Commerce's Policy and Advocacy repository, *Hamilton Economic Development Action Plan 2016-2020*, McMaster University Strategic Plan 2016-2021, Mohawk College Strategic Plan 2016-2021.

# Hamilton also targets zero carbon emissions, reduced congestion and vibrant public spaces

## Summary of objectives of key stakeholders' published visions for Hamilton (continued)

<b>Clean and safe</b>	<ul style="list-style-type: none"> <li>● Reduce greenhouse gas emission to net zero by 2050</li> <li>● Businesses and organizations to take a leadership role and operate in a sustainable manner</li> <li>● Everyone has a deep understanding and respect for nature and for the environment</li> </ul>
<b>Build up environment and infrastructure</b>	<ul style="list-style-type: none"> <li>● City design and planning based on maximizing well-being</li> <li>● Encourage Hamiltonians to be connected to the city's rich history through architecture</li> <li>● Well maintained and vibrant public spaces</li> <li>● Achieve a 48% non-single occupant vehicle modal split by 2031, with a target of 15% for walk/cycle, 12% for transit and 21% for auto passenger and shared modes</li> <li>● Relieve congestion and position Hamilton as a hub for people and goods movement</li> <li>● Identify and implement infrastructure investments that will drive economic growth</li> </ul>
<b>Culture and diversity</b>	<ul style="list-style-type: none"> <li>● People of all ages, backgrounds and abilities are accepted and celebrated, and have the support they need to thrive</li> <li>● A thriving local arts scene</li> <li>● Have Hamilton recognized nationally as a great place to live, buoyed by a thriving arts and culture scene, vibrant neighbourhoods, and strong commercial districts</li> </ul>
<b>People and performance</b>	<ul style="list-style-type: none"> <li>● Encourage healthy, respectful and supportive workplaces, continuous learning, and performance excellence</li> <li>● Provide an enriching and transformative learning experience for all students, which includes opportunities for experiential, work-integrated and self-directed learning</li> </ul>

# Hamilton's municipal government has a wide range of existing strategies and plans for achieving its ambitions

## Summary of current notable municipal plans seeking to deliver on Hamilton's vision

### Existing strategies and plans

Community engagement and participation

Diversity and inclusion

People and Performance

Economic prosperity and growth

Build up environment and infrastructure

Clean and green environment

Healthy and safe communities

**Global Hamilton:** A new office that promotes Hamilton abroad to attract and retain immigrants.

**Hamilton music strategy:** Strengthen local community through its music industry and support musicians that own small businesses.

**Youth engagement strategy:** Currently conducting a survey to hear about Hamilton's youth in navigating job and career opportunities.

**Housing and homelessness action plan:** To ensure that everyone in Hamilton has a home.

**Hamilton Indigenous Strategy:** to support Indigenous communities.

**Waterfront redevelopment:** Enhancing residential and commercial uses, and year-round cultural and recreational attractions.

**A plan to improve the city's energy efficiency** by monitoring utilities, by, among other initiatives, refurbishing old buildings and updating its vehicle fleet.

**Light-rail train:** Plans to build a 14-km light rail transit line with 17 stops, enabling users to travel across the city in about 30 minutes.

**BLAST transit network:** plan for five rapid transit lines that connect all four corners of the city, update the Indoor Recreation Facilities Study for new recommendations around the development and renewal of recreational facilities.

Increased number of bike parking places to **promote cycling**, street tree planting initiative, Team up to Clean Up initiative to help clean up the city.

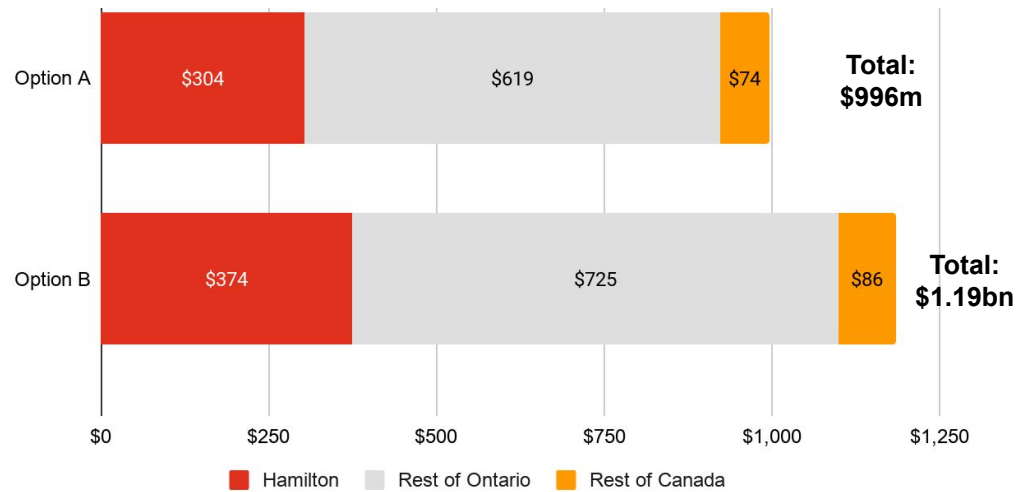
**Hamilton's food strategy:** Become a city with a sustainable food system where everyone has access to affordable, high-quality food.

5

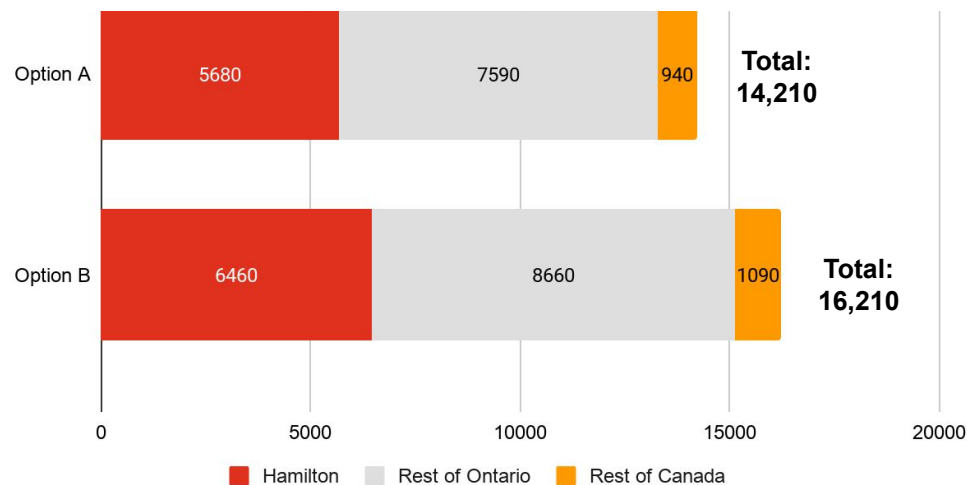
How the Games can  
help Hamilton to  
deliver on its  
ambitions

# Investment in stadia and operation of the Games alone could create an economic footprint of up to \$1.19bn in Canada

## GDP Impact, cumulative value between 2021 and 2026 (\$ million)



## Jobs Impact, total person years of employment between 2021 and 2026



Note: all monetary values are expressed in constant 2020 Canadian dollars unless otherwise stated, figures may not sum due to rounding

We have developed two scenarios that estimate the impact of the The Commonwealth Games on the economy, based on the latest available Games budget estimates (Options A and B). These show that:

- Games operations and investments in stadia and venues could create an economic footprint in Canada of between \$996m and \$1.19bn based on direct, indirect and induced impacts. This would also support between 14,210 and 16,210 person years of employment between 2021 and 2026. Over 90% of this footprint is expected to be in Ontario.
- Within Hamilton, we estimate that the Gross Domestic Product (GDP) footprint of the Games could be between \$304m and \$374m, in addition to between 5,680 and 6,460 person years of employment. To the extent possible, we understand that in hiring and in the awarding of contracts, preference will be given to local constituents and businesses, which has the potential to increase this initial estimate of local impact.

These estimates are based **purely on the capital investments and operating activities** needed to stage the Games, and at this stage **do not include other potential economic impacts** such as:

- Spending by **visitors, athletes and officials during the Games** or any longer-term **boost to tourism**
- The **new build construction of an athletes and officials village**, which would be converted to affordable housing after the Games
- Savings to the Municipal budget** due to Games-related capital expenditure and the assumption of future operational costs to run venues
- Unlocking of **federal or provincial funding for investment** in wider Games and non-Games infrastructure, such as transportation
- Catalytic effects on **trade or foreign investment** resulting from Hamilton's increased profile on the World stage and direct connections with the Commonwealth Family
- Greater ability to attract **domestic private sector investment** due to the enhanced brand, infrastructure and built environment in Hamilton

Future phases of this study will be designed to develop **monetary estimates for these additional categories to gain a fuller picture of the impact of the Games.**

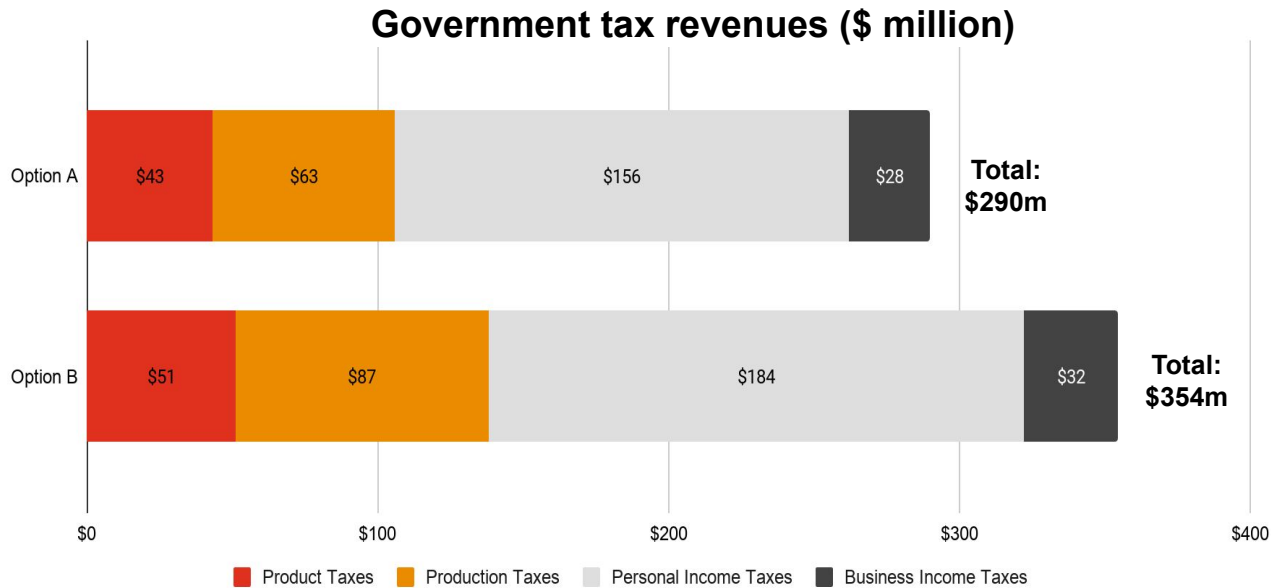
# Our approach assesses the direct, indirect and induced economic impacts of the games

The impact numbers depicted for GDP, employment and tax are the sum of direct, indirect and induced impacts, which range from the spending directly going to suppliers, the money then going to suppliers' suppliers, and finally, the increase in general consumption arising from higher employment and incomes in all of those industries.

We have developed these estimates through a combination of Statistics Canada's published input-output multipliers and PwC's economic modelling. These values represent gross estimates of the economic footprint of the Games and do not represent a net assessment of the impact compared to alternative uses of the funds.

We note that, while the Games' budget is one element upon which the GDP impact of the Games is calculated, the budget and the GDP footprint are different in several key ways:

1. As the GDP impact is calculated up to 2026, items in the budget expected to be spent after that date, such as endowments to fund the operation of venues after the games, are excluded.
2. The Games budget includes contingencies which are excluded from the GDP impact estimates as it is assumed these will not be spent.
3. GDP is a measure of "value added" whereas the budget is a measure of "gross expenditure". In simple terms, GDP can be thought of as gross expenditure less the cost of inputs required to deliver that expenditure. Therefore, direct GDP will always be lower than the expenditure numbers on which it is based.
4. The Games' budget numbers do not include indirect and induced impacts (through supply chain impacts and employee spending effects) but these are included in the GDP estimates.



With this approach, we also estimate the tax impact associated with the GDP and employment effects described on the preceding slide. We estimate that the Games could also generate between \$290m and \$354m in taxes.

This reflects a range of product-specific taxes (e.g. GST/HST), production taxes (e.g. property tax rates for commercial properties), as well as personal and business income taxes generated from the activity fueled by the Games. This number is a gross value, i.e. it does not net out any increase in public funding of the Games.



# The Games provide an opportunity to renew Hamilton's brand as a modern city and act as a catalyst to regeneration

## Summary of interview findings on the potential value of the Games

Impact framework category	How the Games may benefit Hamilton	Key objectives supported
<p><b>Showcases</b> the city's profile as a desirable place to live, work, study and visit.</p>	<ul style="list-style-type: none"> <li>The Games would bring nationwide and worldwide visibility and would showcase the modern aspects of the City, such as the arts and food scene, high levels of liveability and natural beauty.</li> <li>Waterloo is 10 years ahead of Hamilton in rebranding itself as a modern, technology-based centre, and the Games could allow Hamilton to catch up.</li> <li>The Games would put emphasis on the livelihood of neighborhoods and quality of universities to attract domestic and international students.</li> <li>The 2003 World Cycling championships boosted tourism and increased Hamilton's name recognition. The Games are vastly larger and would be expected to deliver an even bigger impact.</li> <li>Along with boosting name recognition, the Games could also provide an opportunity to encourage the adoption of new terminology for the region that names Hamilton specifically, e.g. the GTHA ("Greater Toronto and Hamilton Area") rather than the GTA, which is more commonly used today.</li> <li>The Games should boost university demand due to a greater recognition and reputation for the city.</li> </ul>	<p>Grow the urban Hamilton population by 110K, or 16.4% by 2041.</p>
<p>Supports <b>physical, economic and social regeneration and transformation.</b></p>	<ul style="list-style-type: none"> <li>The Games provide an opportunity to accelerate critical infrastructure investments in transportation, to boost the regeneration of the waterfront, and, potentially, the development of a new/upgraded convention centre.</li> <li>A key part of the Games' power legacy would be the great benefit of converting the athletes village into affordable housing once the Games are over.</li> <li>The Games could lead to the development of a new aquatic centre and/or national track, which would be enduring facilities for residents to use for athletic events and activities in the future.</li> <li>A key part of the public space legacy could be the creation/regeneration of walkable and cyclable lanes and car-free spaces.</li> <li>The Games could help boost Mohawk's Challenge 2025 program (an outreach initiative to train disadvantaged groups) by bringing more people into the workforce. This vehicle is already in place, and the Games would provide the labour demand.</li> <li>It is critical that the Games actively encourage procurement from local businesses, potentially through local sourcing rules, to boost the economic impact.</li> <li>It is important to spread the Games' infrastructure across the city and to foster connectivity across sites, and not only in affluent areas.</li> </ul>	<p>Provide infrastructure investments that will drive economic growth.</p> <p>Achieve a 48% non-single occupant vehicle modal split by 2031, with a target of 15% for walk/cycle, 12% for transit and 21% for auto passenger and shared modes.</p> <p>Ensure 100% of households (25% annually) on the Access to Housing waitlist are assessed by 2023.</p> <p>Supports UN Sustainable Development Goal 9: Industry, Innovation and Infrastructure.</p>

*"Hamilton has a brand issue as it is stuck in Toronto's shadow and needs a clear and distinct identity"*

*"The creation of affordable housing is a critical legacy goal for the Games"*

# The Games are likely to enhance tourism, trade, investment and community sports participation

## Summary of interview findings on the potential value of the Games (cont'd)

Impact framework category	How the Games may benefit Hamilton	Key objectives supported
Strengthens <b>trade, investment and tourism</b> links with other parts of the Commonwealth and the rest of the world.	<ul style="list-style-type: none"> <li>The Games could catalyze new hotel developments, which would boost tourism and business travel, as hotel capacity is currently limited in Hamilton. Incentives for visitors with tickets to stay locally could also be of benefit.</li> <li>The Games would likely have a strong impact on tourism through Hamilton's increased profile and improved facilities and built environment.</li> <li>The Games would provide a springboard to build stronger trade and investment relationships with other Commonwealth nations like India and the UK. This could be facilitated by operating a trade centre during the Games, and by hosting delegations at events.</li> <li>Games athletes could be trained to be ambassadors when going back to their countries.</li> <li>Hamilton has a huge capacity for investment, with over 800 acres of developable industrial lands ready to go. There could be a strong link to the post-COVID-19 push to improve resilience of supply chains and bring strategic production onshore.</li> <li>The Games would bring in additional federal and provincial funds that may not otherwise have been allocated to Hamilton.</li> </ul>	<p>Make Hamilton Canada's top mid-sized city in terms of investment, talent and quality of life.</p> <p>Residents can find well-paying local jobs, benefiting all residents.</p> <p>Supports UN Sustainable Development Goal 8: Decent Work and Economic Growth.</p>
Promotes <b>community sports participation</b> and elite sporting success.	<ul style="list-style-type: none"> <li>The legacy of the event is likely to increase participation in sports already well-established in the community, and could add interest in new sports.</li> <li>It is critical to ensure community accessibility to the new sports venues after the event. For example, the Tim Horton's field (used for soccer in the Pan Am games) has hosted a successful free coaching program for disadvantaged young people.</li> <li>The improved facilities would provide an opportunity for Hamilton to attract elite athletes to establish themselves in Hamilton and to provide a permanent Canadian base for key sports like Basketball, both of which would bring investment and prestige to Hamilton.</li> <li>Hamilton could create future events on each anniversary of the Games to establish a sporting legacy.</li> </ul>	<p>People lead active lives in safe, inviting neighbourhoods and friendly communities.</p> <p>Supports UN Sustainable Development Goal 3: Good Health and Well-being.</p>

*"Most people's enduring image of Hamilton is the sight of the smokestacks as you drive over the Skyway, but this is the historic picture of when it was just a steeltown"*

*"Hamilton hosts the largest trades school in Ontario (Mohawk College), and the Games could have a transformative impact on lives by encouraging training and boosting employability"*

# The Games may bring pride and confidence to Hamiltonians and provide a platform to engage different communities

## Summary of interview findings on the potential value of the Games (cont'd)

Impact framework category	How the Games may benefit Hamilton	Key objectives supported
Inspires community <b>pride and confidence</b> .	<ul style="list-style-type: none"> <li>The City needs a swagger and the Games could provide that by proving to everyone that Hamilton can deliver this major event.</li> <li>Volunteering interest in Hamilton is already very high and this would create huge extra opportunities for people to engage in the community.</li> <li>The events could help students to mix more with other residents and improve community cohesion.</li> <li>It would be critical to ensure that all segments of the population equally benefit from the Games.</li> <li>The Games could lead to a significant increase in population growth through awareness and improved built environment.</li> <li>Designing appealing and durable Games gear with a branding that will last for generations.</li> <li>Ensuring that the Games are marketed as one piece of the solution in the objective of regenerating Hamilton overall.</li> <li>Providing free transit and tickets to poorer communities to help them see the Games.</li> </ul>	<p>A sense of pride for the city exists among residents, driving volunteerism and community-based initiatives.</p> <p>Supports UN Sustainable Development Goal 3: Good Health and Well-being.</p>
Catalyzes communities to adopt <b>positive behaviours</b> .	<ul style="list-style-type: none"> <li>The Games would provide a great opportunity to engage Indigenous communities in volunteering, employment opportunities and community engagement.</li> <li>Sustainable practices should be embedded into all aspects of the Games, and they would provide an opportunity to present new design built with the aim of reducing GHG emissions while applying best sustainability practices.</li> <li>Students from Mohawk, McMaster, Redeemer and area high schools could be heavily engaged through internships and Games-related projects.</li> </ul>	<p>Equip graduates with entrepreneurial and global competencies and bolster their job readiness.</p>

*“Hamilton needs an injection of pride and confidence”*

*“People in Hamilton still talk about the 2003 Cycling World Championships with pride”*



Evidence from past  
editions of the games

# Previous Games provided an enduring 25% boost to tourism, showcased host cities to 1.5 billion people and accelerated urban regeneration efforts by 20 years

## Examples of impact estimates for past Games

### Spending effects on GDP

- Public spending before, during and after the 2002 Manchester Games has boosted GDP in the host city/region by £0.8bn-£1.2bn and generated between 13,600 and 23,000 full time equivalent (FTE) jobs.

### Physical, economic and social regeneration and transformation

- A 147-hectare derelict site was reclaimed and revamped in East Manchester for the 2002 Games, and investment in sports, leisure and entertainment facilities also went up. Local house prices increased more quickly than in the surrounding region as a result of the regeneration. £400m was invested into new homes and into the community.
- “If we didn’t have the Commonwealth Games in Manchester, the regeneration would be 20 years behind.”*  
Sir Howard Bernstein, Chief Executive, Manchester City Council (2000-2016).
- In Glasgow 2014, the athletes’ village, Emirates Arena, Velodrome, Hockey Centre and Swimming Centre were developed in the heart of the wider Clyde Gateway redevelopment. After the Games, the village was converted into 700 affordable houses, in addition to a 120-bed care home.

### Trade, investment and tourism

- Global TV audience of 1-1.5bn provided an incredible opportunity to showcase Manchester worldwide. Tourism increased by up to 25% in the three years after the 2002 Manchester Games, and fueled trade deals and investments of up to £400m in the city.
- In Melbourne 2006, a survey showed that 34% of impacted businesses had seen or expected to see export growth.
- Glasgow 2014 saw a 22% rise in tourist numbers in the Games year, and a further 26% growth over the next three years, compared to an 18% fall in annual tourism numbers in the four years prior to Games.

Source: PwC Commonwealth Games Value Framework Report, The Commonwealth Games Federation, December 2019

# Host cities have also seen up to 10% of the population taking up sports for the first time, almost 100 million website hits, and the ability to attract significant federal funding

## Examples of impact estimates for past Games

### Sports participation

- There is evidence that hosting the Games has led to increased sports participation in the host city region. 10% of Victorians reported taking up sports as a result of Melbourne 2006, and there was a 5% increase in sports participation in Queensland following Gold Coast 2018.
- 50,000 new users registered for sports at the newly-built facilities following the Manchester 2002 Games.

### Community pride and confidence

- On the Gold Coast, 83 communities across Queensland hosted community events as the Queen's Baton Relay travelled around the state, carried by more than 1,800 baton bearers. As only the third Commonwealth Games to utilize social media, Gold Coast 2018 connected and engaged with a global audience to tell the stories of the modern Commonwealth.
- Glasgow 2014 had one million average daily visitors to its website, delivering 84m page views from viewers in 228 different countries. Social media channels attracted 503,000 followers, who created 3.4m mentions across the channels.

### Capital and operating expenditures

- The Games attract public funding that cities may not otherwise have received. For example, the national government contributed 2.7 times more than local governments in Manchester 2002 and 3.0 times in Glasgow 2014. In Australia, the state government contributed 75% and 79% of total public sector expenditure in Melbourne 2006 and Gold Coast 2018.

# Assessments of past Games show that the economic benefits outweigh the costs of hosting the Games

	Manchester, 2002	Melbourne, 2006	Glasgow, 2014	Gold Coast, 2018
<b>Employment impact (FTE jobs)*</b>	23,000	13,600	16,800	21,100
<b>Gross value-added**</b>	£1.1bn (CA\$2.0bn)	£1.0bn (CA\$1.8bn)	£0.8bn (CA\$1.4bn)	£1.2bn (CA\$2.1bn)
<b>Geography assessed</b>	Manchester	Victoria	Scotland	Queensland
<b>Total public sector spending**</b>	£0.3bn (CA\$0.6bn)	£0.6bn (CA\$1.0bn)	£0.5bn (CA\$0.8bn)	£0.9bn (CA\$1.6bn)
<b>Public sector ROI***</b>	3.25x	1.73x	1.77x	1.32x
<b>Time period assessed</b>	Pre-Games, Games, and post-Games; 1995-2012	Pre-Games, Games, and post-Games; 2002-2022	Pre-Games and Games; 2007-2014	Pre-Games, Games, and post-Games; 2013/14-2021/22

\* Full-time equivalent jobs supported over the period assessed.

\*\* GVA is a measure of economic activity. GVA and public sector spending figures are in 2018 prices and exchange rates. Values are converted to 2018 Canadian dollars.

\*\*\* Return on Investment, i.e. the economic activity generated for each public dollar spent. Numbers are not perfectly comparable across Games due to differences in areas of spending and impacts used in the calculation.

Source: PwC Commonwealth Games Value Framework Report, The Commonwealth Games Federation, December 2019

# Appendix A: details of vision and strategy documents



## Summary of key stakeholders' published visions for Hamilton

	Municipal Government	Chamber of Commerce	Hamilton Economic Development	McMaster Innovation Park	McMaster University	Mohawk College
<b>People, community engagement and participation</b>	<p>People are consulted and involved in decision-making, working together and making a positive impact on the community. A sense of pride for the city exists among residents, driving volunteerism and community-based initiatives.</p> <p>Population growth target is to reach 780K by 2041.</p>	<p>We engage our members and city at large in efforts to celebrate and promote Hamilton as a community of choice. Our primary goals are to boost pride in our city, and to attract talent and investment needed to grow our economy.</p>		<p>Engage and leverage the community to foster innovation and support entrepreneurship.</p>	<p>McMaster remains committed to public service, with a focus on fostering ongoing collaboration between the University and community partners. This work enables us to better understand and consider the issues identified as priorities by local and global communities, and to integrate them fully and meaningfully into the work of the academy.</p>	<p>To demonstrate leadership in four priority areas vital to the development of our college and our community: enhancing leadership in Indigenous education; advance diversity; social inclusion; and increasing the international student base and the global expertise of all students.</p>
<b>Economic growth and prosperity</b>	<p>People successfully provide for themselves and their families and have opportunities to grow and develop. Post-secondary institutions and businesses collaborate with the city, contributing to the success of our economy. Residents can find well-paying local jobs, benefiting all residents.</p>	<p>Goal to make Hamilton Canada's top mid-size city in terms of investment, talent and quality of life. Helping build neighbourhoods and commercial districts that provide healthy environments for people and businesses to flourish.</p>	<p>Goal to attract and retain businesses in Hamilton, foster innovation and provide an increased number of living-wage job opportunities. Another priority is to retain the Most Diverse Economy title and for Hamilton to be recognized as having the Best Workforce in Ontario.</p>	<p>McMaster Innovation Park (MIP) is Canada's premier research and innovation park supporting startups, business, research and offering collaborative space to transform ideas from vision to commercial reality. The mission is to help companies grow, by bridging academia and industry.</p>	<p>Keep research current and relevant to local and global communities, and have an impact across a wide range of disciplines and issues. Provide opportunities for commercialization to our faculty and students and bridge the gap between research and commercial application.</p>	<p>Equip graduates with entrepreneurial and global competencies and bolster their job readiness with comprehensive simulation-based experiential learning.</p>
<b>Healthy and safe communities</b>	<p>People lead happy lives in safe, inviting neighbourhoods and friendly communities, with easy access to services and support required to be healthy and active. One goal is to ensure 100% of households (25% annually) on the Access to Housing waitlist are assessed by 2023.</p>					

## Summary of key stakeholders' published visions for Hamilton (cont'd)

	Municipal government	Chamber of Commerce	Hamilton economic development	McMaster Innovation Park	McMaster University	Mohawk College
<b>Clean and safe</b>	A clean environment enhances the well-being of communities. Organizations take a leadership role and operate in a sustainable manner. Everyone has a deep understanding and respect for the natural environment and its important contribution to our lives. A specific goal is to reduce greenhouse gas emission to net zero by 2050.					To lead in sustainability, with significant reductions in carbon emissions and paper consumption.
<b>Build up environment and infrastructure</b>	City design and planning based on maximizing well-being. Hamilton's transportation systems are well connected regionally. Hamilton is connected to its rich history through architecture. Public spaces are well maintained and vibrant, with greenspace and attractions for residents and visitors. The city wishes to achieve a 48% non-single occupant vehicle modal split by 2031, with a target of 15% for walk/cycle, 12% for transit and 21% for auto passenger and shared modes.	Advocate for balanced municipal infrastructure that allows our commercial districts to thrive and for regional infrastructure that connects people to opportunity, relieves congestion and positions Hamilton as a hub for people and goods movement.	The term "infrastructure" in the 21st century includes more than just the traditional roads, bridges and utilities; it must now be inclusive of information communication technology (broadband), our intellectual capacity, our cultural, recreational and social infrastructure, and the supply chains which support all of these. Our goal is to identify and implement infrastructure investments that will drive economic growth.			

## Summary of key stakeholders' published visions for Hamilton (cont'd)

	Municipal government	Chamber of Commerce	Hamilton economic development	McMaster Innovation Park	McMaster University	Mohawk College
<b>Culture and diversity</b>	People of all ages, backgrounds and abilities are accepted and celebrated. There are various events and a thriving local arts scene. Downtown areas are bustling centres of economic and community activity. People of all backgrounds, ages and abilities call Hamilton home and have access to the support and opportunities they need to succeed.		Our goal is to have Hamilton recognized nationally as a great place to live, buoyed by a thriving arts and culture scene, vibrant neighbourhoods, and strong commercial districts.		McMaster supports the broader community through our work to foster a diverse campus community and create enhanced pathways and improved supports for underrepresented groups, including Indigenous students, Crown Wards and First Generation students.	
<b>People and performance</b>	Effective leadership; A healthy, respectful and supportive workplace, continuous learning, performance excellence and accountability, enabling communications, fiscal health and financial management.				To provide an enriching and transformative learning experience for all students, which includes opportunities for experiential, work-integrated and self-directed learning, and allows for the consideration of multidisciplinary perspectives. Alongside this, McMaster has long committed to integrating its world-class research enterprise into teaching and learning, and connecting the learning experience to local, national and international communities.	To improve student outcomes and support the college's recruiting and growth strategies, by providing more pathways to a broader range of credentials. Involving the community through distinctive Continuing Education programs that are entry points for non-traditional students and returning graduates. In addition, vigorously fostering financial literacy and student engagement are both key drivers of student success.

# Appendix B: About PwC

# About the authors



With over 276,000 people employed in 158 countries, PwC is a global network of highly experienced and specialized professionals. PwC Canada provides industry-focused assurance, tax and advisory services to build public trust and enhance value for our clients and their stakeholders. We serve clients in all major Canadian industry groups, including government and public sector, healthcare, private company services, financial services, insurance, technology and telecommunications, energy, mining, retail and consumer, real estate, commercial and industrial products.

Our Economics and Policy Practice staff are trained in delivering reports that are subject to public scrutiny and criticism. Thus, our approach, methodology, and interpretation provide a high level of credibility. This focus has established several of our recent reports as the basis for decision-making, informing stakeholders including governments, and building consensus on contentious issues. Our experience in providing testimony on economic issues demonstrates our ability to communicate complex economic concepts to a lay audience in a persuasive and accurate manner.

Clients engage us for complex economic studies because they recognize that an economic analysis that incorporates multi-disciplinary capabilities leads to effective, nuanced, and dynamic studies. Our practice has recently completed or is currently conducting policy studies for audiences such as governments, industry associations, and educational institutions.

We have over a century of excellence in Canada, providing industry-focused assurance, tax and advisory services to Canadian organizations in both private and public sectors. Our history in Canada goes back to 1907, when one of our founding firms, Price Waterhouse, opened its first Canadian office in Montréal.

We currently employ more than 7,850 partners and staff across 27 offices in Canada.



# Appendix C: List of United Nations Sustainable Development Goals

# Summary of UN Sustainable Development Goals

## SUSTAINABLE DEVELOPMENT GOALS



Source: United Nations

**Goal 1:** End poverty in all its forms everywhere

**Goal 2:** End hunger, achieve food security and improved nutrition and promote sustainable agriculture

**Goal 3:** Ensure healthy lives and promote well-being for all at all ages

**Goal 4:** Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

**Goal 5:** Achieve gender equality and empower all women and girls

**Goal 6:** Ensure availability and sustainable management of water and sanitation for all

**Goal 7:** Ensure access to affordable, reliable, sustainable and modern energy for all

**Goal 8:** Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

**Goal 9:** Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

**Goal 10:** reduce inequality within and among countries

**Goal 11:** Make cities and human settlements inclusive, safe, resilient and sustainable

**Goal 12:** Ensure sustainable consumption and production patterns

**Goal 13:** Take urgent action to combat climate change and its impact

**Goal 14:** Conserve and sustainably use the oceans, seas and marine resources for sustainable development

**Goal 15:** Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss

**Goal 16:** Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels

**Goal 17:** Strengthen the means of implementation and revitalize the global partnership for sustainable development

# Thank you

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The report has been prepared for the Hamilton2026 Commonwealth Games Bid Corporation in accordance with the terms of our engagement letter dated 3 June 2020 and for no other purpose. We do not accept or assume any liability or duty of care for any other purpose or to any other person to whom this report is shown or into whose hands it may come save where expressly agreed by our prior consent in writing. This is a draft prepared for discussion purposes only and should not be relied upon; the contents are subject to amendment or withdrawal and our final conclusions and findings will be set out in our final deliverable.

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