

Niagara 2031
2007 Resident Survey
Discussion Paper
September 2007



BACKGROUND

Niagara Region has recently embarked on defining a growth management strategy in order to engage citizens, businesses, community leaders and governments in the process of planning thoughtful future development in Niagara. Niagara 2031: A Strategy for A Healthy, Sustainable Future is being developed to create a better Niagara -- setting the stage for where and how Niagara will grow until 2031 and beyond. This effort is in line with recent Provincial direction.

“Growth” is a complex term that involves not just physical growth, but also economic, cultural, environmental, and social aspects. Niagara 2031, Niagara’s Growth Management Strategy, must consider opportunities where they might not have been noticed before, and is an excellent opportunity to improve on past practices.

The Strategy will provide a framework for amendments to policy documents such as the Regional Policy Plan, and will help link land use, infrastructure and capital investment. Niagara 2031 will focus on Niagara-wide concerns such as population and employment allocations, servicing systems, transportation, and significant agricultural lands and environmental features. In addressing these concerns it is important to ask:

How do the residents of Niagara perceive their community today and in the future?

PURPOSE OF THE SURVEY

In the Spring of 2007 the Region hired Leger Marketing to conduct a Residential Survey in order to better understand the needs and expectations of the Niagara community in various areas of community development.

The different viewpoints expressed through the survey results provide a greater appreciation for the complex task involved in determining sustainable growth options for Niagara.

This paper asks a number of questions that follow from the results of the survey. The questions will be answered in the next phases of Niagara 2031, through additional study, research and public consultation.

SURVEY METHODOLOGY

Twelve hundred Niagara area residents were surveyed in June of 2007 -- 100 residents from each of the 12 municipalities. The results are considered to be accurate to within +/- 2.8%, or 19 times out of 20.

GROWTH

The survey canvassed general attitudes held by residents of the Niagara community to growth and the direction of where it should go, and found the following:

- 7 in 10 visualize their community changing in the next 20 years, most commonly in size and population [p. 3, 24]
- 65% of residents would have no concerns about their neighbourhood staying the same size [p.13]
- most commonly residents are concerned about traffic or commute times associated with growth. Community safety is the next priority concern [p.12]
- 11% are concerned about the 'look and feel' of their neighbourhoods if their neighbourhoods were to grow; 10% are concerned about overcrowding if their neighbourhood were to grow [p.12]
- 5% are concerned about loss of parks and green space if their neighbourhood were to grow [p.12]
- 4% are concerned about tall buildings if their neighbourhood were to grow [p.12]
- 66% of residents think the urban or downtown areas of their city or town are in the most need of development [p.14]
- 65% think that urban and downtown areas are the areas where multi-unit residential buildings would be appropriate [p.15]
- Support for a downtown development approach was highest in St. Catharines, Welland, Niagara Falls, and Fort Erie [p.14]



Aerial Image - Downtown St. Catharines

Most people surveyed recognized that some amount of change is inevitable. Through time, the dynamics of a neighbourhood changes as the people who live in the place grow older, children move away and new people move into the area, although the neighbourhood itself may not change in size. A more stable neighbourhood might notice very little change over time, whereas others will experience more redevelopment as businesses close, properties fall into disrepair or tastes alter.

Given a wide-spread anticipation that change will occur, what needs to be done to address the concerns about growth and change?

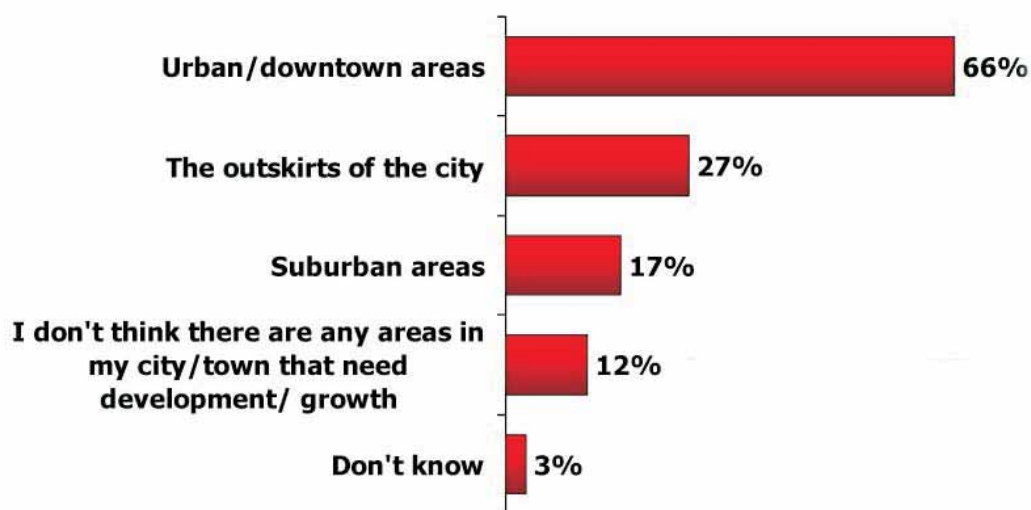
The use of good planning principles and urban design might help mitigate some of the concerns people have as their neighbourhoods change.

The survey results indicate that people feel their downtown neighbourhoods are most in need of development, rather than the countryside or suburban areas. The Region has advocated this approach as a means of creating vibrant, lively downtown areas that have a mixture of people living, working and recreating in the core. When people live closer to their place of work or school, they may take alternative forms of transportation lessening the cars on our roads and thereby some concerns about commute time. A vibrant downtown also has the benefit of more people around at all times of the day and night; therefore some concerns about personal safety might be lessened.

Growing south is a direction for growth that was not specifically surveyed, however residents in St. Catharines, Welland, Niagara Falls and Fort Erie responded most favourably towards downtown development. According to the Regional Policy Plan, growing south directs growth towards the communities of Thorold, Welland and Port Colborne along the 406 corridor, and to Niagara Falls and Fort Erie along the QEW corridor. Part of the Niagara 2031 work will be to determine how much growth should be directed south.

Given apparent support in some “southern tier” municipalities for downtown development, what needs to be done to reinforce the “grow south” direction to benefit those municipalities?

Areas that Need Development/Growth - Overall



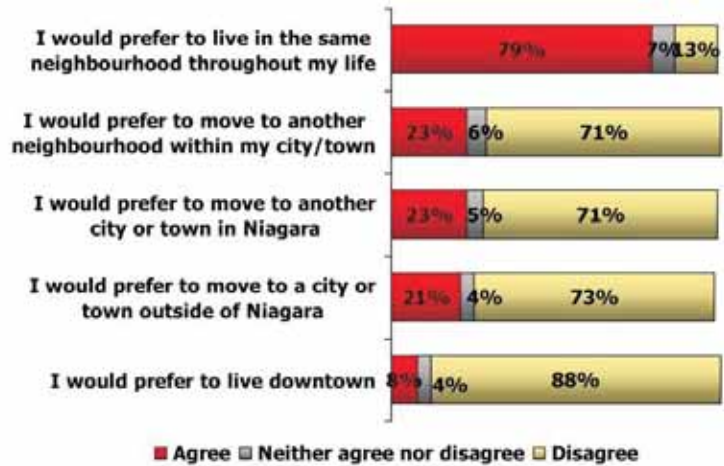
COMMUNITY DYNAMICS: MOVING OR STAYING

The survey canvassed general attitudes to and expectations regarding personal or household change within the Niagara community, and found the following:

- 8 in 10 residents would prefer to live in the same neighbourhood their entire lives [p.22]
- reasons for moving vary. However, 15% say they expect to move in order to change jobs, and 1 in 10 say they plan to downgrade their home or retire in the next 10 years [p.23]
- 7% would move to upgrade their home, or be closer to family [p.23]
- 21% indicated that they would prefer to move to a city or town outside of Niagara [p.22]

Neighbourhoods and communities change to meet the needs of the residents, or the residents move to other places. Housing choice is important if people are to be able to stay in place, as the needs or prices that are affordable to a young professional starting out might be different from that of a dual-income couple, family or a senior who wishes to downsize. The availability of jobs, educational, social and recreational opportunities also have to meet the needs of the individual or family. The ability to get to school, work, recreational activities or visiting friends might also influence the desire to move. Living far away from these things can make walking and cycling difficult and with no access to a personal vehicle or transit a person might be forced to move closer or depend on others.

Agreement with Following Statements



Given that individuals and households desire stability and anticipate natural changes, what needs to be done in Niagara to provide stability for those who want it, and options for change for those who anticipate it?



As Niagara's demographics change, what are the long-term implications for school locations?

HOUSING AND NEIGHBOURHOODS

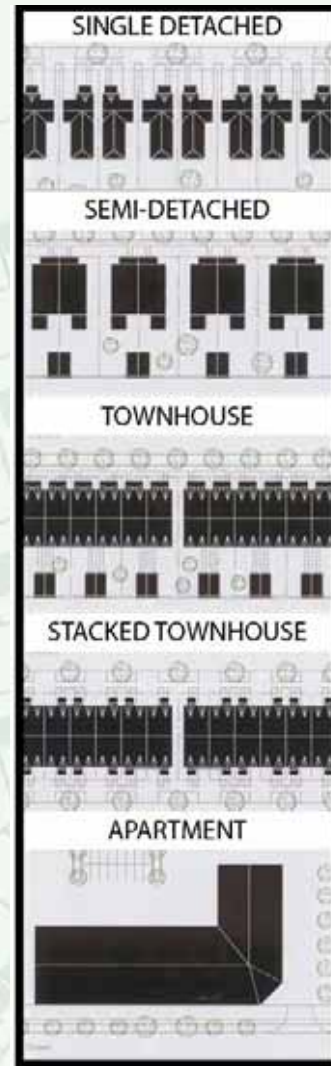
The survey canvassed a number of issues related to housing and neighbourhoods. The key findings are as follows:

HOUSING PREFERENCES

Niagara residents want a mix of housing.

- 61% would like to have detached housing in their neighbourhood. 37% would like to have apartments. 31% would like to have townhouses [p.11]
- 1 in 10 residents said they plan to downsize their home or retire in the next ten years. As a result they plan to move at some time in the future [p.23]

For several decades, housing production in Niagara has tended to follow the 'baby boom' demographic. The current mix of housing across Niagara is in the general proportions of 70 - 80% low density, 10 - 15% medium density, and 10-15% higher density. This mix does not match the preference indicated in the survey. As more people retire and downsize their homes they can move into townhomes, apartments and condos in their neighbourhood, while newly established families can occupy these older, larger homes. These natural fluctuations in demographics and life cycle can open up a whole new range of housing options.



Can we achieve increased density targets in a housing type that is also "low rise"?
Which low- and mid-rise options are acceptable models for intensification in the future?
Can acceptable intensification be achieved through improved design? Will "high rise downtowns" be sufficient to meet Niagara's intensification targets?

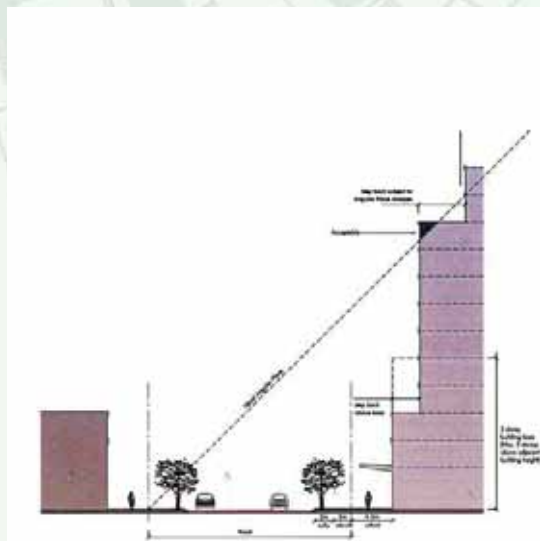
MULTI-UNIT RESIDENTIAL BUILDINGS

Multi-unit residential buildings tend to be 'lightning rods' for neighbourhood opposition. The survey asked about residents' attitudes.

- 65% of residents said that urban and downtown areas would be the most appropriate areas for multi-unit residential buildings. However, 15% of residents stated that they would not want to see any multi-unit residential buildings in their neighbourhood. This attitude is especially prevalent among those who own their home [17% v. rent: 6%] and live in a single-detached house [16% v. apartment/ condo: 4%] [p.15]
- 79% of residents surveyed want future multi-unit residential buildings to be under 11-stories high. Only 2% of residents surveyed believe that 11 stories or more is an acceptable height for multi-unit residential buildings [p.15]
- 63% of residents think that less than 5-stories is an acceptable height for multi-unit residential buildings [p.15]



Multi-unit residential buildings can include apartments or condominiums that can take the form of a tower or complex to something as simple as an accessory unit in a dwelling. They can also include a number of units on floors above a store or office similar to what would be found in a typical downtown setting. Numerous examples of multi-unit residential buildings can be found throughout stable, well-established neighbourhoods in Niagara. Good design principles for communities suggest that the height of buildings should generally fit within the context of their surroundings. There are, however, techniques that can help a taller building not seem as tall by recessing higher floors from the building face.



How can we take advantage of these naturally occurring demographic changes and related shifts in housing choice to address future housing demand?

THE AFFORDABILITY CHALLENGE

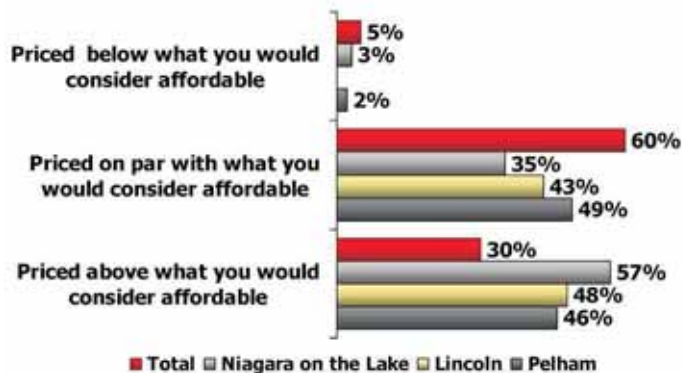
Housing affordability is a measure of quality of life, and of long term sustainability.

- Sixty percent of homeowners and 54% of renters consider housing prices in their neighbourhood to be affordable [p.6]
- One third of Niagara area residents surveyed do not currently work, especially those over the age of 56, those with high school or less education, and a household income less than \$50K [p. 27-29]
- Residents surveyed who rent and those who live in medium density areas are more likely to want townhouses [32% and 29%, respectively] and apartment or condo buildings [34% and 24% respectively] [p.11]

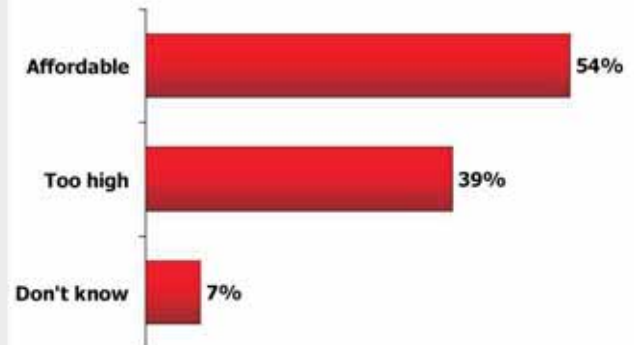
Just over half of the population consider household and rental prices affordable. Respondents in Niagara-on-the-Lake, Lincoln and Pelham were much more likely to feel that housing prices were not affordable than the other municipalities. There are definite barriers to housing when one is unemployed, on a fixed income, and having trouble paying the rent or mortgage. For example, single parents, seniors, the under or unemployed, immigrants and students may all find themselves in need of housing, yet unable to find adequate places to accommodate themselves, spouses or possibly children in a typical neighbourhood. A mixture of housing types at a range of prices can provide options for people throughout their life stages as well as those who have fallen on hard times. This might help provide that leg up that some need to be able to focus on other factors that improve their quality of life.

What do we need to do to address the affordability challenges experienced by many Niagara residents?

Affordability of Homes



Affordability of Rent Prices



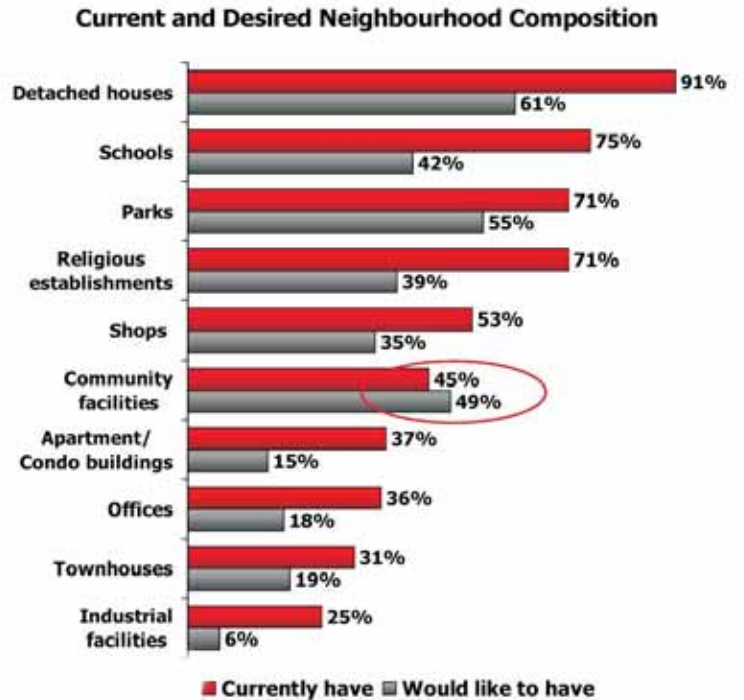
What do we need to do to create mixed use neighbourhoods containing the amenities residents would like to have?

NEIGHBOURHOOD AMENITIES

Niagara residents want to have amenities in their neighbourhoods.

- 55% would like to have parks in their neighbourhoods, and 49% would like to have other community facilities [p.11]
- 42% would like to have schools in their neighbourhoods, and 39% would like to have religious establishments [p.11]
- 35% would like to have shops in their neighbourhoods, and 18% would like to have offices [p.11]

Life is hectic enough without having to run all over to buy a bag of milk, pick the kids up from school, mail a letter, go visit friends and family, attend a concert, or throw a ball at the park. As our lives get busier, many want to have easy access to more facilities close to home. This mix of uses might allow a person to pick up a litre of milk while walking the dog or home from the park; walk to the local café to grab a coffee with some friends; or bike over to the community centre to watch a local sports game.



How are we to achieve the complete, mixed use communities proposed in Provincial policy with such a low tolerance for shops and offices in the neighbourhood mix?

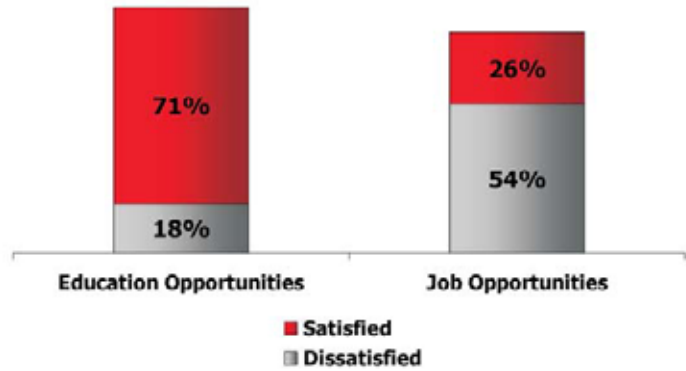
A VARIETY OF PLACES TO WORK AND GO TO SCHOOL

The demographic breakdown of the workforce that was sampled in the survey was: 45% working full-time, 28% retired, 9% working part-time, 9% self-employed or own their own business, 4% unemployed, 3% homemaker, 1% student, and 1% refused [pp.28].

- 54% of Niagara residents are dissatisfied with job opportunities in Niagara [p. 9]
- 15% are considering moving out of the Region within the next 10 years because of it [p.23]
- 71% are satisfied with current education opportunities [p. 9]

The manufacturing sector in Niagara was once very strong. The tourism sector is gaining ground, however many of the jobs in this sector are not high paying. Whatever ones occupation, people need jobs that provide them with personal fulfillment and financial stability and the training and education to allow them to fulfill those positions. Niagara is dedicated to achieving a variety of employment opportunities in a variety of areas. Provincial policy is guiding communities to preserve employment lands in order to ensure long-term economic prosperity. The challenge will be to utilize these lands in an effective way.

Satisfaction with Education and Employment Opportunities



Aerial Image - St. Catharines Industrial Area



What do we need to do to address concerns about job opportunities and ensure the proper training and education is available for these positions?

TRANSPORTATION AND TRANSIT

The recent history of Niagara has been one of typical suburban development in a car-oriented form. The survey questioned residents' satisfaction with transportation options in Niagara's municipalities.

CYCLING AND WALKING

- Niagara area residents generally consider roadways for cycling and sidewalks to be more important than public transit [p.18]
- 88% of residents surveyed said it is important that there are enough and adequate sidewalks so people can walk to places in their neighbourhood [pp.19], and 84% of residents said that it is important to have enough and adequate roadways for cycling [p.19]
- 75% of residents surveyed said that there are enough and adequate sidewalks that allow people to walk to places in their neighbourhood [p.18]
- 77% of residents said there are enough and adequate roadways that allow cycling [p.18]

Recent health literature has pointed to the design of our communities being a cause for higher rates of obesity in our society. Many of the features that make a community walkable also make them easier to cycle; however special lanes along roads may be required for safer cycling. Walkable neighbourhoods and communities provide destinations for people to walk or cycle within a convenient distance. Other considerations that make a community or neighbourhood walkable include: whether or not a person feels safe, if the sights and sounds are interesting, or if there is dedicated space for walking or cycling. A walkable community typically includes special paths for recreational use, as well as sidewalks or routes along roads that a person would regularly travel by car, transit or bike.



What do we need to do to help bring about these improvements for the residents who would appreciate having them?

TRANSIT

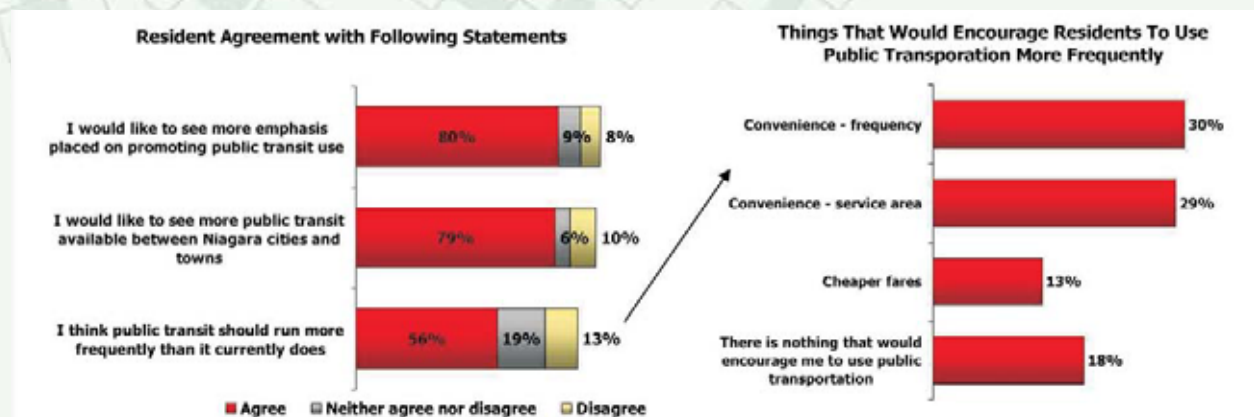
- 8 of 10 residents surveyed would like to see more emphasis placed on promoting public transit, and 79% would like improved transit availability between Niagara cities and towns [p.20]
- 2% of residents surveyed said that they take public transit to work. 82% drive to work [p.17]
- 1 in 3 residents surveyed who had public transit in their community said they would use public transportation more if it was more frequent [30%] or more accessible [29%] [p.20]

Currently Niagara does not have a comprehensive transit system. Four municipalities have individual transit systems, with some linkages to other communities and services, e.g. Brock University. Niagara Region recently began offering a Specialized Transit service, and has applied to the Federation of Canadian Municipalities for a grant to further study a Niagara transit system.

What do we need to do to encourage people to take transit to work? What are the social, economic, environmental and cultural benefits that are involved in providing transit service?



Research has shown that an adequate concentration of people will help make transit systems more efficient and economically viable. Sometimes transit service, while not necessarily self-sustaining, is supportive of other transit-dependent objectives.



THE SOCIAL AND CULTURAL DIMENSIONS

The social and cultural infrastructure can often act as focal points to a community, heighten the quality of life and spur economic development and activity.

- The majority of residents surveyed believe that there are just the right number of and are satisfied with the parks, open spaces and recreation facilities [57% & 77%], seniors facilities [49% & 57%], and community centres and libraries [69% & 76%] within Niagara [p.8]. The Niagara community is generally satisfied with what is currently available in terms of social and cultural facilities [p.1]
- 63% believe there are not enough youth facilities; 53% believe there are not enough health care and emergency facilities, and 44% believe there are not enough cultural facilities [p.7]
- 36% are satisfied with the quality of youth facilities; 50% are satisfied with the quality of health care and emergency services, and 56% are satisfied with the quality of cultural facilities [p.7]

The relatively high level of satisfaction indicated by the survey is off-set by clearly defined opportunities to improve on what is available. Youth facilities seem to be ‘top of list’. Concern about the number of seniors facilities seems to anticipate the needs of an aging population. Concern about health care and emergency facilities seems to echo broader concerns on a national level about the state of the health care system.

As demographics change Niagara may need to take into consideration the needs and desires of new immigrants, youth, and increased numbers of seniors in the future. These groups will want to feel a community presence in the Niagara area. As the demographics change, having the foresight to create additional social and cultural facilities that will accommodate these groups will bring great benefit to Niagara.



What do we need to do to address the challenges in Niagara's social and cultural dimensions?

SUMMARY

The 2007 Resident Survey has revealed important insights about attitudes to growth in Niagara. These insights lead to new questions for further consideration in subsequent phases of the Niagara Growth Management Strategy.

It is intended that the insights generated from this Discussion Paper in tandem with The 2007 Resident Survey will support Niagara's continuing dialogue about growth related issues. Each phase of the Niagara Growth Management Strategy will bring Niagara one step closer to a healthy, sustainable future.

Are there any other issues that should be discussed?