



Regional Municipality of Niagara



2007 Resident Survey

- July 2007 -

Toronto

Edmonton

Calgary

Montreal

Philadelphia

New York

Objectives & Methodology

▶ Objectives

- ▶ To understand resident needs and expectations with respect to community development and growth

▶ Methodology

- ▶ A total of 1200 Niagara area residents answered a telephone survey between June 4th and 15th, 2007

- ▶ The 1200 respondents are comprised of 100 residents from 12 municipalities within the Niagara region. The municipalities were:

City of St. Catharines

City of Welland

Town of Grimsby

Township of West Lincoln

City of Port Colborne

Town of Niagara on the Lake

City of Niagara Falls

Town of Fort Erie

Town of Lincoln

City of Thorold

Town of Pelham

Township of Wainfleet

- ▶ With a sample size of 1200, results can be considered accurate to within +/- 2.8%, 19 times out of 20
 - ▶ With sample sizes of 100 per municipality, regional results can be considered accurate to within +/-9.8%, 19 times out of 20
 - ▶ Note: Wainfleet not statistically significant (n=19)
- ▶ For the overall results, responses were weighted to represent the population in each city as well as the gender and age compositions within each city

Executive Summary

- ▶ Most believe the urban or downtown areas are the most in need of development and the most appropriate places for a multi-unit residential building to go up, however, only 8% would prefer to live downtown
- ▶ The majority have concerns about their community growing but no concerns about it staying the same size
- ▶ Most commonly residents are concerned about traffic or commute times associated with growth
- ▶ The majority would *not* like to have apartment/condo buildings, offices, townhouses or industrial facilities in their community
- ▶ 7 in 10 Niagara area residents envision their community changing in the next 20 years, most commonly in size and population
- ▶ The majority of people surveyed believe housing prices are affordable, both to own or rent
 - ▶ Niagara on the Lake homeowners are more likely to say that prices are higher than affordable
- ▶ 8 in 10 would prefer to live in the same neighbourhood their entire lives, especially residents of Wainfleet

Executive Summary

- ▶ The majority are satisfied with the current education opportunities but *dissatisfied* with job opportunities
- ▶ The majority say there are the right number of parks, open spaces and recreation facilities, seniors facilities, community centres and libraries and shopping facilities, and that they are satisfied with them
- ▶ There is a demand for more and better youth facilities
- ▶ Over 7 in 10 residents surveyed consider transit important and at least 8 in 10 think it should be promoted and run more frequently
 - ▶ Over half believe transit should be made more available between cities
 - ▶ Those who have transit in their community say they would use it more if it ran more frequently and if it were made more available
- ▶ Of those who work, only 2% take transit

Attitudes Towards Growth

Toronto

Edmonton

Calgary

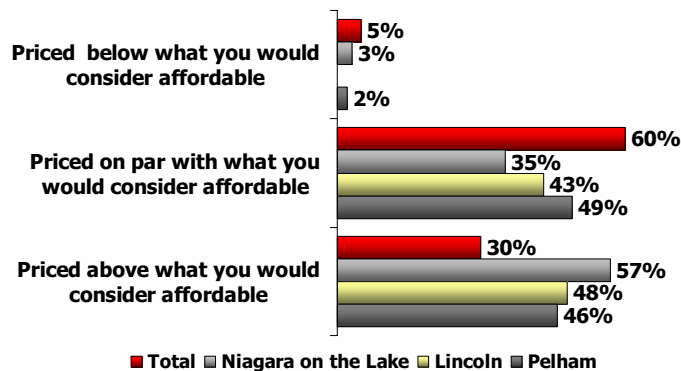
Montreal

Philadelphia

New York

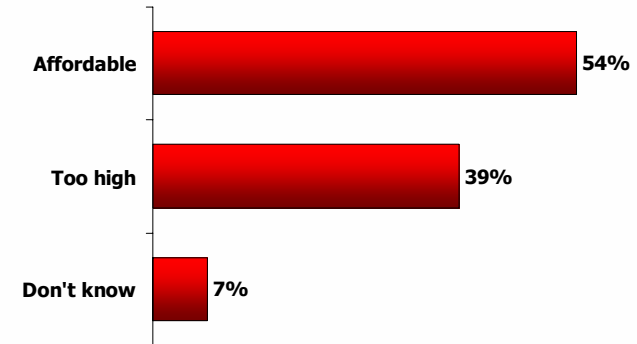
Sixty Per Cent of Homeowners and Fifty-Four Per Cent of Renters Consider Housing Prices in Their Neighbourhoods to Be Affordable

Affordability of Homes



Q10. Thinking about what you consider affordable, would you say that the house prices in your neighbourhood are... Base: All adult Niagara area residents who currently own the residence in which they live, or live with their family (n=1048)

Affordability of Rent Prices

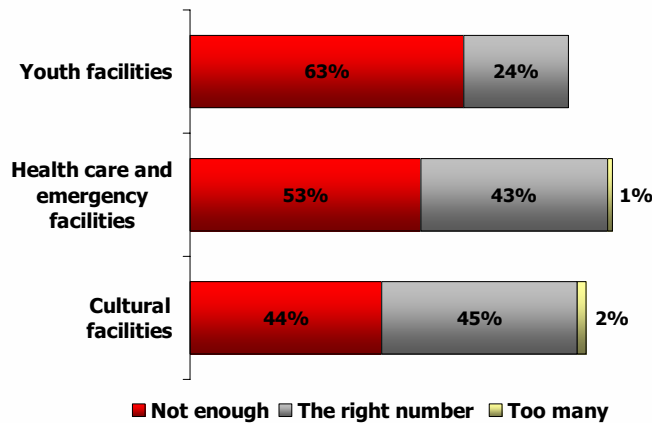


Q11. Which statement best reflects your opinion of rent prices in your neighbourhood? Base: Those who currently rent (n=145)

- ▶ While 60% of homeowners consider residential real estate in their area affordable, the majority of Niagara on the Lake homeowners do not (57% say prices are too high)
 - ▶ Homeowners in Lincoln and Pelham are relatively split between affordable and too high (Affordable: Lincoln: 43%, Pelham: 49%; Too high: Lincoln: 48%, Pelham: 46%)
- ▶ 51% of Niagara area residents whose home costs above \$300K are also more likely to believe prices are above what is affordable while 66% of those whose home is \$300K or less consider prices to be affordable
- ▶ In terms of rent prices, the majority of renters consider renting in their neighbourhood affordable (54%)

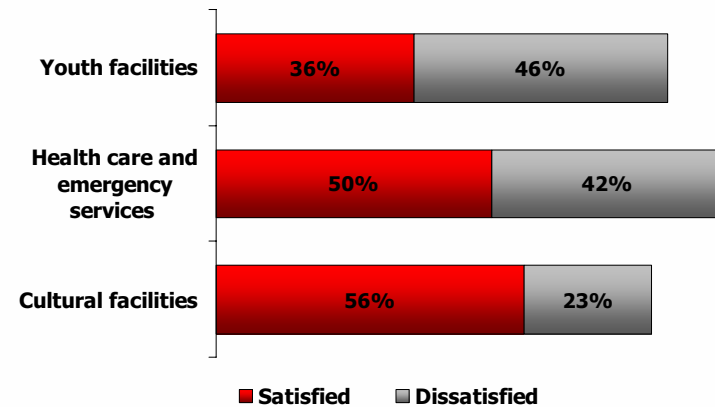
Most Residents Believe There Are Not Enough Youth Facilities Or Health Care And Emergency Facilities

Number of Facilities



Q21. Looking at your community overall, would you say there are not enough, just the right number of, or too many... Base: All adult Niagara area residents (n=1201)

Satisfaction with Facilities

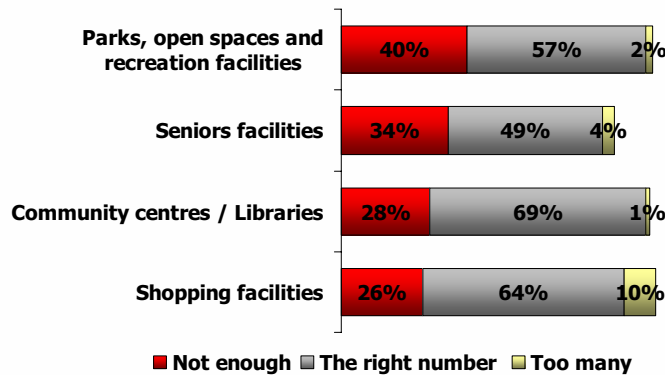


Q22. Overall, how satisfied are you with the ... in your community? Base: All adult Niagara area residents (n=1201)

- ▶ **Most residents believe there are not enough youth facilities (63%) or health care and emergency facilities (53%) and nearly half (46%) are dissatisfied with the youth facilities**
 - ▶ Younger area residents are more likely to say there are not enough youth facilities and more likely to be dissatisfied with the current ones (72% of those aged 55 and younger say there are not enough facilities vs. 46% of those aged 56 and older and 51% are dissatisfied vs. 34% of those over the age of 65)
 - ▶ 80% of residents in West Lincoln say there are not enough youth facilities, more than any other municipality (see Niagara breakdown on slide 10)
- ▶ **Half are satisfied with the health care and emergency services, but those aged 55 and younger are more likely to be dissatisfied (47% vs. over age 65: 30%)**
- ▶ **While 44% believe there are not enough cultural facilities, especially those aged 55 and younger (49% vs. age 56+: 34%), most are satisfied with the current facilities (56%)**

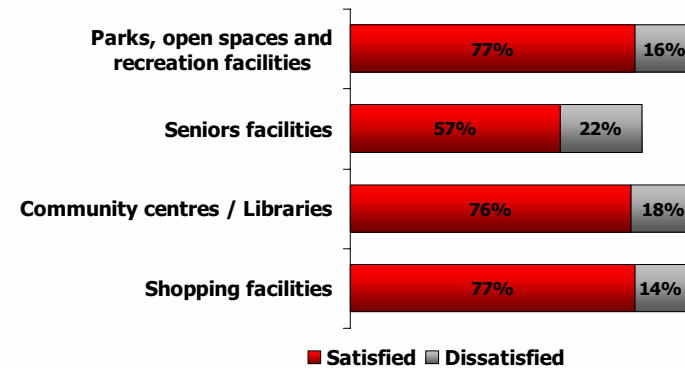
Sixty-Four Per Cent Of People Surveyed Think That There Are Just The Right Number Of Shopping Facilities And Ten Per Cent Think There Are Too Many

Number of Facilities



Q21. Looking at your community overall, would you say there are not enough, just the right number of, or too many... Base: All adult Niagara area residents (n=1201)

Satisfaction with Facilities

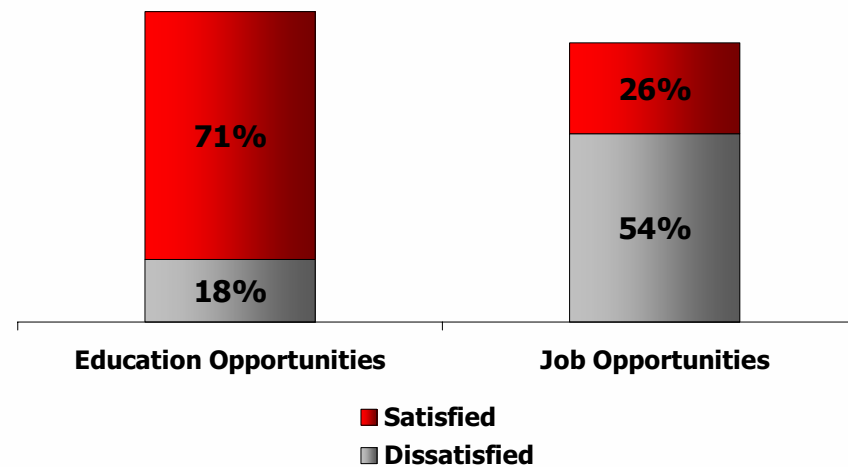


Q22. Overall, how satisfied are you with the ... in your community? Base: All adult Niagara area residents (n=1201)

- ▶ **The majority believe there are just the right number of and are satisfied with the parks, open spaces and recreation facilities, seniors facilities, community centres and libraries and shopping facilities**
 - ▶ Residents of West Lincoln and Port Colborne express more dissatisfaction towards the number of shopping facilities in their community (see Niagara breakdown on slide 10)
 - ▶ Those living in St. Catharines and West Lincoln are more likely to say there are not enough cultural facilities, parks, open spaces and recreation facilities and seniors facilities (see Niagara breakdown on slide 10)
 - ▶ Those living in Niagara Falls, Thorold and Wainfleet are also more likely to say there are not enough seniors facilities (see Niagara breakdown on slide 10)

The Majority Are Satisfied With Education Opportunities And Dissatisfied With Job Opportunities

Satisfaction with Education and Employment Opportunities



- ▶ The majority are *satisfied* with current education opportunities and *dissatisfied* with job opportunities
 - ▶ 28% of 18 to 34 year olds are *dissatisfied* with education opportunities versus 13% of those over the age of 45
 - ▶ Working age residents and those who live in high density areas are most *dissatisfied* with the current job opportunities
 - ▶ Age 18 to 65: 58% vs. age 66+: 39%
 - ▶ 71% vs. lower density 52%

Niagara Breakdown – Reference Table for Q21

Facilities Residents Feel There Are Not Enough Of by Municipality					
	Youth facilities	Cultural facilities	Parks, open spaces and recreation facilities	Seniors facilities	Shopping facilities
Total	63%	44%	40%	34%	25%
St. Catharines	64%	51%	49%	41%	10%
Welland	66%	28%	38%	23%	23%
Grimsby	66%	38%	36%	17%	24%
West Lincoln	80%	54%	44%	45%	64%
Port Colborne	66%	34%	24%	27%	54%
Niagara on the Lake	58%	23%	23%	20%	25%
Niagara Falls	58%	46%	41%	44%	30%
Fort Erie	75%	52%	26%	20%	48%
Lincoln	63%	42%	46%	15%	31%
Thorold	69%	56%	40%	45%	40%
Pelham	50%	32%	27%	24%	14%
Wainfleet	35%	27%	19%	42%	30%

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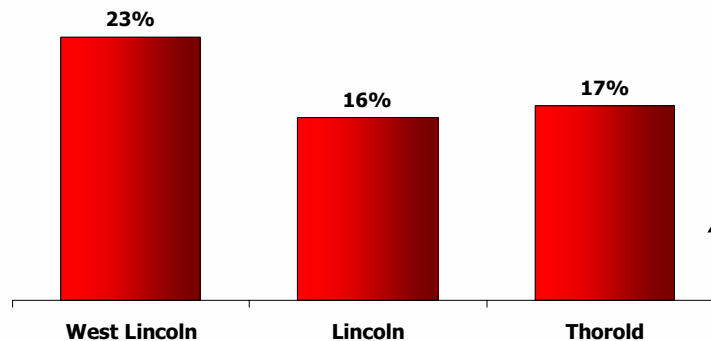
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■ Statistically significant difference when comparing municipalities

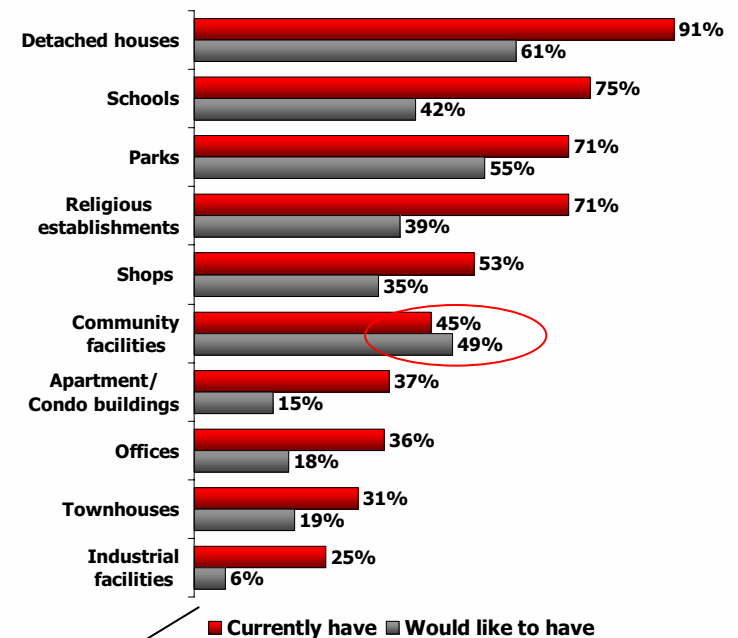
Niagara Residents Would Generally Like A Variety Of Land Uses In Their Neighbourhoods

- ▶ Niagara area residents would generally like to have the same amenities they currently have, however, more say they would like to have community facilities than the number who currently do have them, especially those with children in the home (56% vs. no children: 45%)
- ▶ Those 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)
- ▶ While only 6% would like to have industrial facilities in their neighbourhood, residents of West Lincoln, Lincoln and Thorold are more receptive to this idea

Would Like to Have Industrial Facilities



Current and Desired Neighbourhood Composition



Q3. Which of the following are currently in the neighbourhood where you live? Base: All adult Niagara area residents (n=1201)

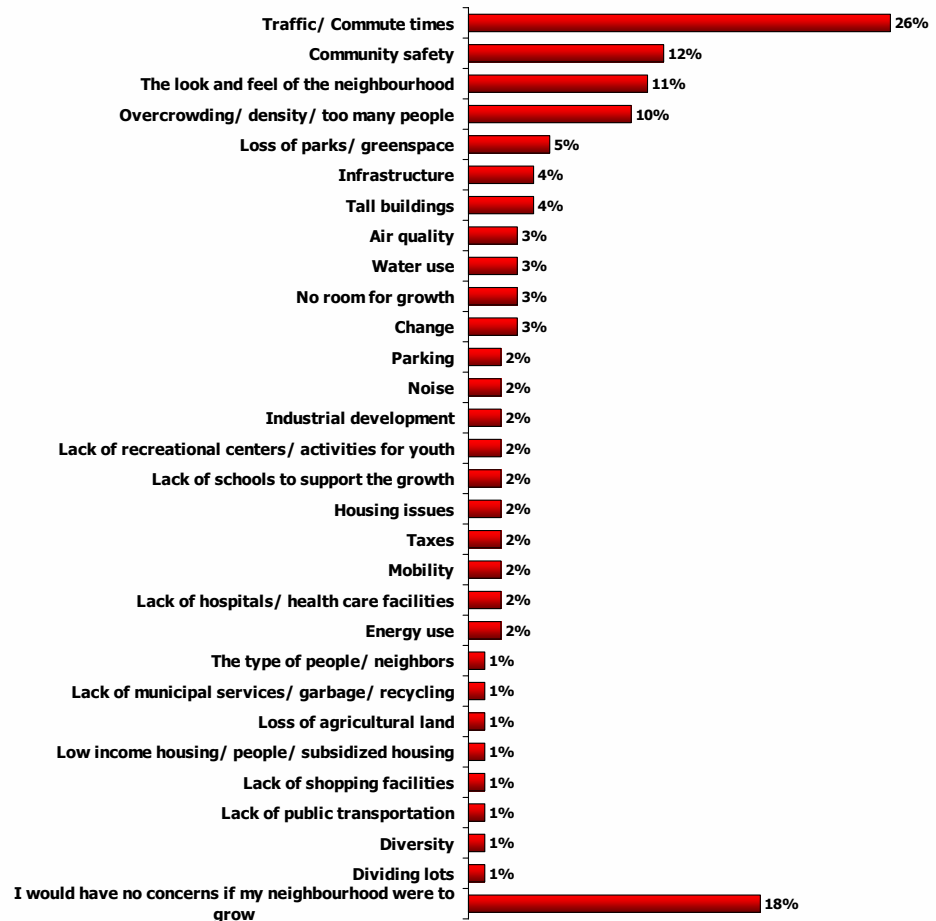
Q4. Which of the following would you LIKE to have in the neighbourhood where you live? Base: All adult Niagara area residents (n=1201)

Twenty-Six Per Cent Would Be Concerned About Traffic/ Commute Times If Their Neighbourhood Were To Grow

Concerns for Growth:

- ▶ **1 in 4 (26%) residents would be concerned about traffic/ commute times and an additional 1 in 10 would be concerned about community safety (12%) and the look and feel of their neighbourhood changing (11%)**
- ▶ **Ten per cent also say they would be concerned about overcrowding of people, especially those who live in low density areas (13% vs. medium to high density: 5%)**
- ▶ **Ten per cent of those living in medium density areas are concerned about losing green space versus 4% of those who live in low density areas and 1% who live in a high density area**
- ▶ **Nearly 1 in 5 (18%) say they would have no concerns if their neighbourhood were to grow**

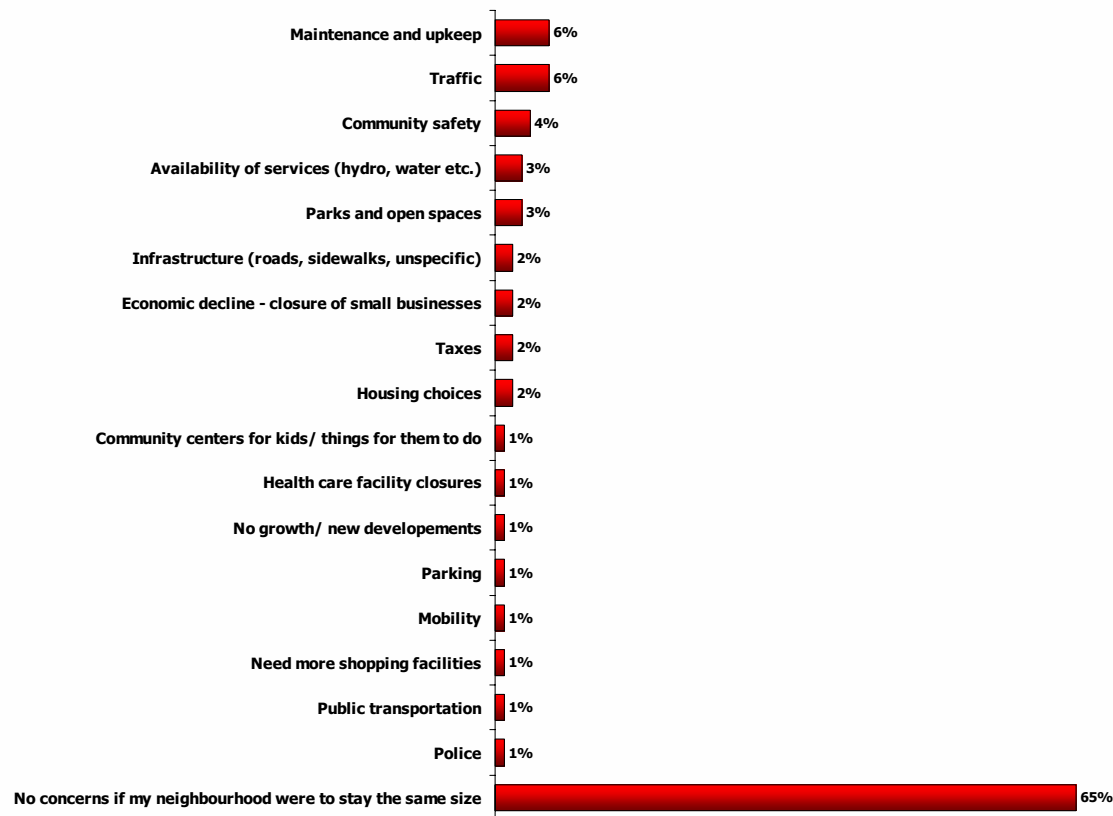
Concerns For Growth



Q5. If your neighbourhood were to grow, what sort of concerns would you have with that? Base: All adult Niagara area residents (n=1201)

Sixty-Five Per Cent Would Have No Concerns If Their Neighbourhood Were To Stay The Same Size

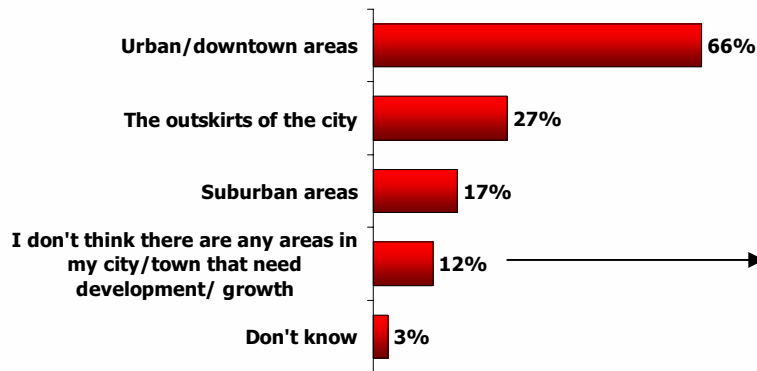
Concerns for No Growth



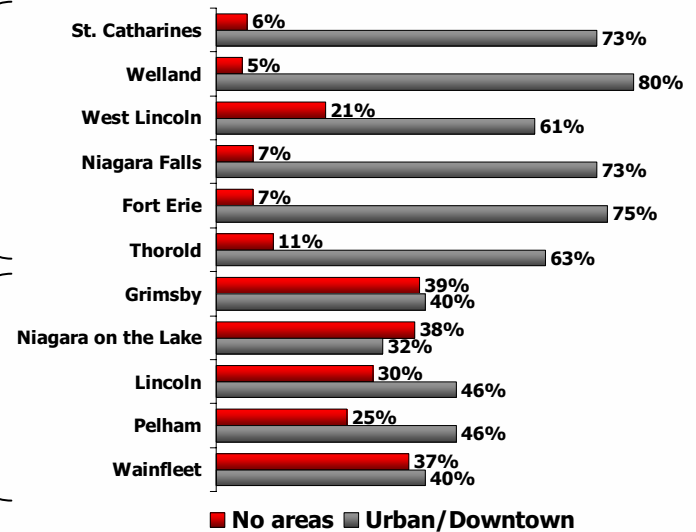
Q6. If your neighbourhood were to stay the same size, what sort of concerns would you have with that? Base: All adult Niagara area residents (n=1201)

Sixty-Six Per Cent Of Niagara Area Residents Think The Urban Or Downtown Areas Of Their City Or Town Are In The Most Need Of Development

Areas that Need Development/Growth - Overall



Areas in need of development - By Municipality

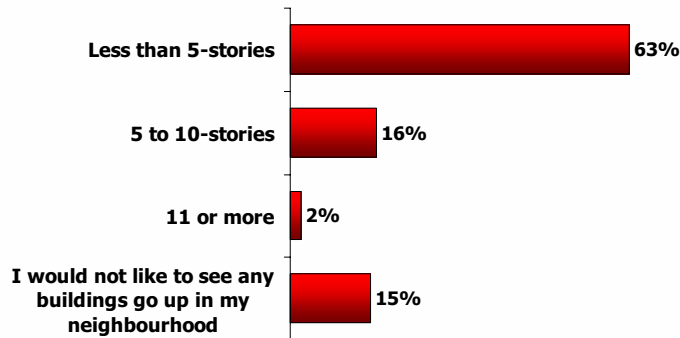


- ▶ St. Catharines, Welland, West Lincoln, Niagara Falls, Fort Erie and Thorold residents are more likely to indicate urban/ downtown areas are the places for growth
- ▶ Nearly 3 in 10 (27%) say the outskirts of the city and 17% say suburban areas
- ▶ While only 12% do not think there are any areas in their city or town that need development, residents of Grimsby (39%), Niagara on the Lake (38%), Lincoln (30%), Pelham (25%) and Wainfleet (37%) are more likely to feel this way

Q14. What areas in your city or town do you think need development/ growth? Base: All adult Niagara area residents (n=1201)

Seventy-Nine Per Cent Of People Surveyed Indicated If Multi-unit Residential Buildings Were To Be Built In Their Area, It Should Be 10-stories Or Under

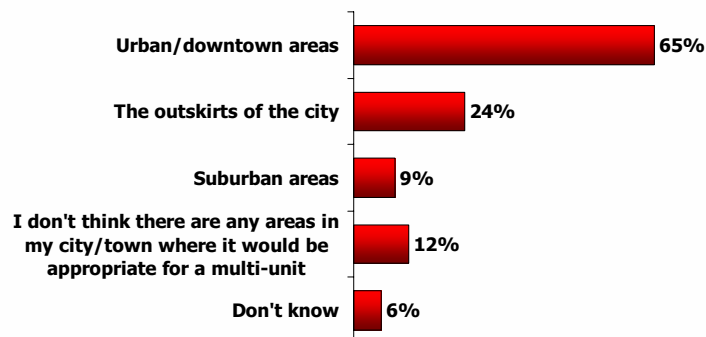
Acceptable Height of Multi-Unit Residential Buildings



Q12. If multi-unit residential buildings were to be built in your area, how many stories would be an acceptable height? Base: All adult Niagara area residents (n=1201)

- ▶ The majority (63%) say less than 5 stories is an acceptable height and only 2% would be okay with multi-unit residential buildings of 11 stories or more
- ▶ While an additional 16% say 5 to 10 stories is acceptable, those who are more tolerant of this size multi-unit residential building currently:
 - ▶ Live in an apartment or condo (31% vs. other housing types (excluding townhouses: 25%): 13%)
 - ▶ Rent (31% vs. own: 13%)
 - ▶ Live in a higher density area (30% vs. low density: 13%)

Areas Where a Multi-Unit Residential Building Would Be Appropriate



Q13. Which areas in your city/town would it be appropriate for a multi-unit residential unit to go up? Base: All adult Niagara area residents who would **not** like to see any multi-unit residential buildings go up in their neighbourhood (n=212)

- ▶ Fifteen per cent of residents would actually prefer to not see any multi-unit residential buildings go up in their neighbourhood, especially those who own their home (17% vs. rent: 6%) and live in a single detached house (16% vs. apartment/condo: 4%)
 - ▶ This response is more common among residents of Port Colborne (28%) and Grimsby (25%) than St. Catharines (11%) or Niagara Falls (12%)
 - ▶ Outside of their neighbourhood, 65% say the urban or downtown areas would be most appropriate

Use of and Attitudes Toward Transportation

Toronto

Edmonton

Calgary

Montreal

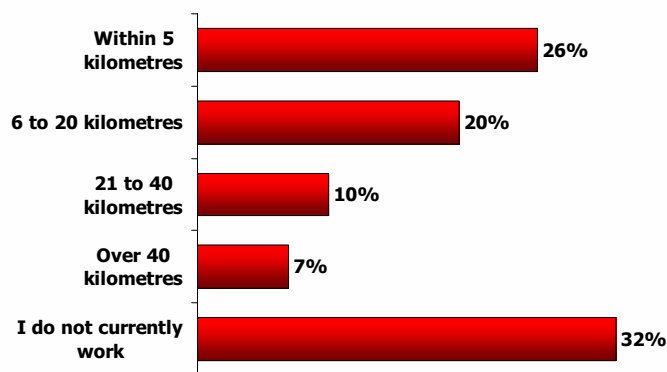
Philadelphia

New York

Eighty-Two Per Cent of Working Residents Drive to Work

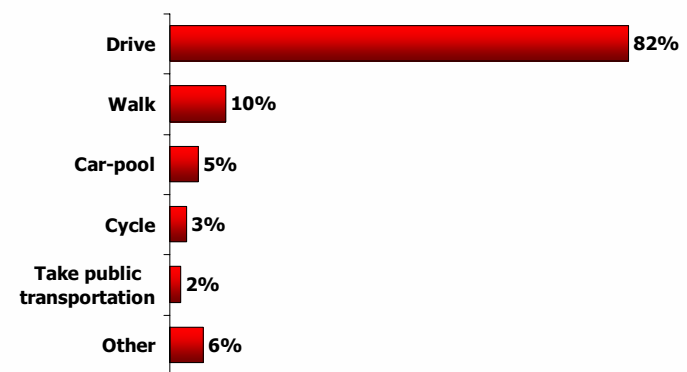
- ▶ While commuting distances vary for those who work, residents of Thorold, Welland and Pelham are more likely than those in Grimsby, West Lincoln, Niagara on the Lake, Lincoln and Wainfleet to have a 6 to 10 kilometre commute
- ▶ Twenty-six per cent of Niagara area residents live within 5 kilometres of work and 46% live within 20 kilometres
- ▶ Eighty-two per cent drive to work; only 2% take public transit
- ▶ One third of Niagara area residents do not currently work, especially those over the age of 56 (73% vs. 55 and under: 10%), those with high school or less education (49% vs. college or university: 22%) and a household income less than \$50K (51% vs. \$50K+: 17%)

Distance to Place of Work



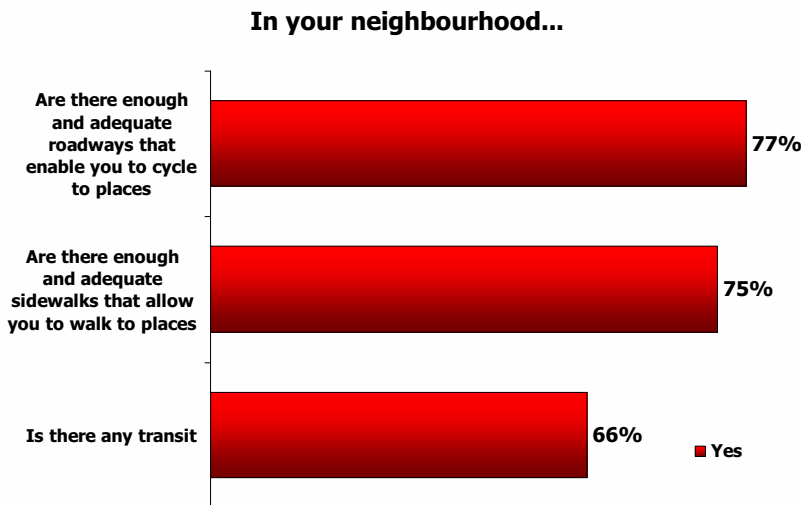
Q15. How far (in kilometres) from your home is your place of work?
Base: All adult Niagara area residents (n=1201)

Method of Commuting to Work



Q16. How do you currently commute to work? Base: All adult Niagara area residents who currently work (n=760)

Seventy-Seven Per Cent Think There Are Enough And Adequate On-road Cycling Opportunities



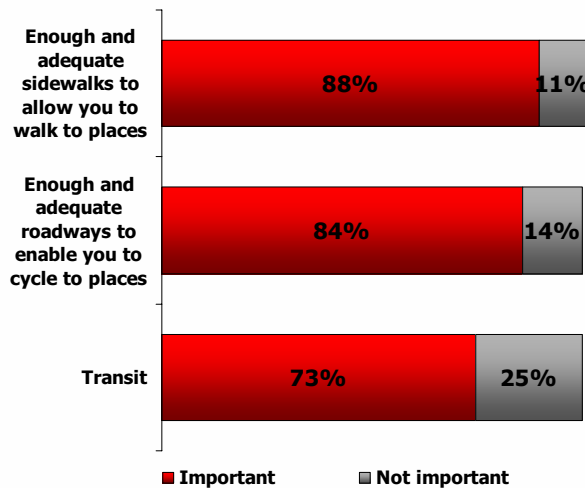
	Not enough/adequate Sidewalks	No Transit
St. Catharines	19%	7%
Wells	24%	12%
Grimsby	26%	90%
West Lincoln	48%	98%
Port Colborne	29%	57%
Niagara on the Lake	30%	90%
Niagara Falls	12%	20%
Fort Erie	32%	19%
Lincoln	45%	92%
Thorold	17%	14%
Pelham	45%	95%
Wainfleet	80%	100%

- ▶ While most residents say their community has enough and adequate roadways for cycling (77%) and sidewalks (75%), residents of West Lincoln, Lincoln, Pelham and Wainfleet are more likely to say there are not enough sidewalks in their community (see above table)
- ▶ Fewer, however, say their community has transit (66%) with at least 9 in 10 residents of Grimsby, West Lincoln, Niagara on the Lake, Lincoln, Pelham and Wainfleet saying their community has no transit at all (see above table)

Q17. In your neighbourhood/ community... Base: All adult Niagara area residents (n=1201)

Seventy-Three Per Cent Of Those Surveyed Consider Transit Important

Importance of Sidewalks, Roadways and Transit



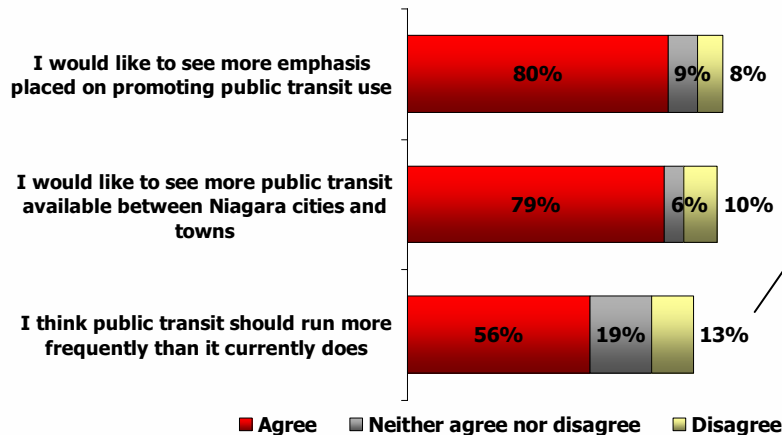
Residents Stating that Sidewalks, Roadways and Transit are Important – By Municipality			
	Transit	Roadways for cycling	Sidewalks
St. Catharines	84%	82%	95%
Welland	81%	94%	93%
Grimsby	54%	88%	88%
West Lincoln	42%	73%	68%
Port Colborne	54%	90%	83%
Niagara on the Lake	69%	91%	80%
Niagara Falls	80%	86%	94%
Fort Erie	74%	84%	94%
Lincoln	48%	79%	66%
Thorold	76%	79%	89%
Pelham	48%	72%	60%
Wainfleet	19%	62%	22%

- ▶ Interestingly, Niagara area residents consider roadways for cycling and sidewalks to be more important than public transit
- ▶ Welland, Grimsby and Port Colborne residents are especially likely to consider *roadways for cycling* and *sidewalks* to be important and St. Catharines, Niagara Falls, Fort Erie and Thorold residents are especially likely to consider *transit* and *sidewalks* to be important (See table above)
 - ▶ Niagara on the Lake residents are more likely to consider *transit* and *roadways for cycling* to be important (See table above)

Q18. How important is it to you for your neighbourhood/community to have...? Base: All adult Niagara area residents (n=1201)

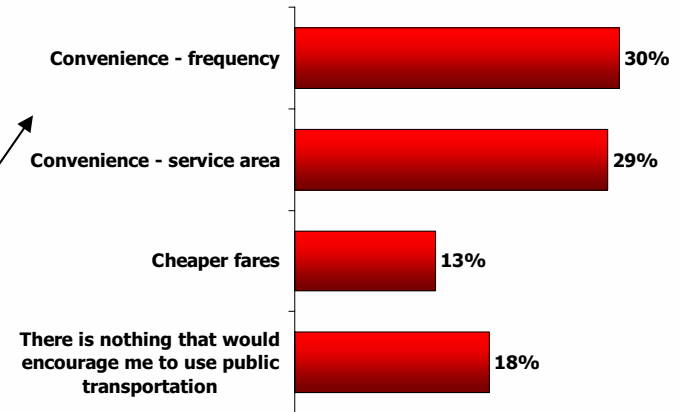
Seventy-Nine Per Cent Of Those Surveyed Would Prefer To See More Public Transit Available Between Cities And Towns

Resident Agreement with Following Statements



Q19. Please tell me how much you agree with each of the following statements concerning public transit in your community. Base: Q19A – All adult Niagara area residents who have transit in their neighbourhood/ community (n=508); Q19B&C - All adult Niagara area residents (n=1201)

Things That Would Encourage Residents To Use Public Transportation More Frequently



Q20. What would encourage you to use public transportation more frequently? Base: All adult Niagara area residents who have transit in their neighbourhood/ community (n=508)

- ▶ **8 in 10 residents would like to see more emphasis placed on promoting public transit (80%) and greater availability between Niagara cities and towns (79%)**
- ▶ **Over half (56%) think public transit should run more frequently, this is especially true in Fort Erie where 74% say transit in their community should be more frequent**
- ▶ **For those who have public transportation in their community, convenience is key for encouraging greater use as 1 in 3 say they would use public transportation more if it was more frequent (30%) or more accessible (29% say service areas)**



Looking Forward

Toronto

Edmonton

Calgary

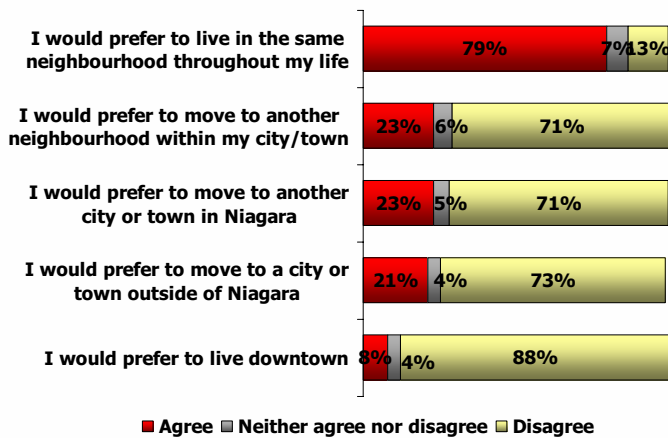
Montreal

Philadelphia

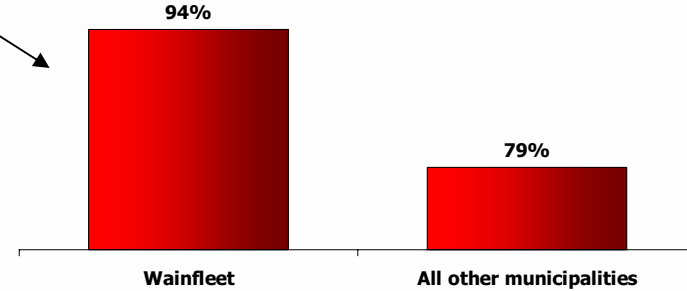
New York

Seventy-Nine Per Cent Would Prefer To Live In The Same Neighbourhood Throughout Their Lives

Agreement with Following Statements



Residents Who Would Prefer To Live in the Same Neighbourhood Throughout Their Life - By Municipality

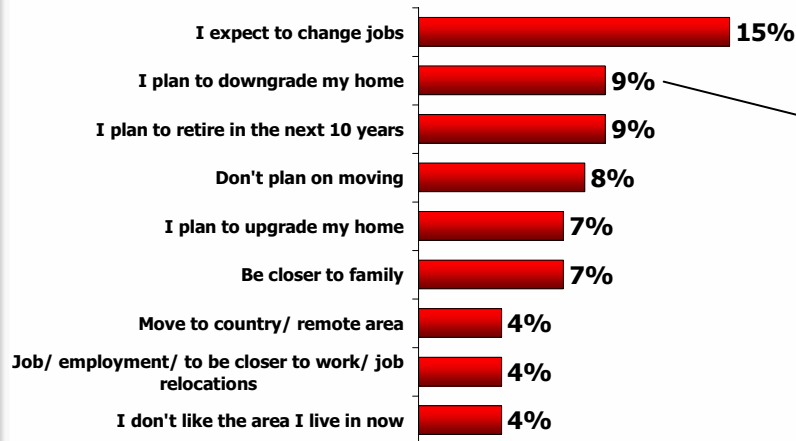


- ▶ Most Niagara area residents would prefer to live in the same neighbourhood throughout their life (79%), especially those living in Wainfleet
- ▶ Residents over the age of 45 are especially likely to live in the same location (85% vs. 45 and younger: 73%)
- ▶ Those under the age of 56 are more likely to move to another neighbourhood within their city or town (29% vs. 11%) or to move to another city or town in Niagara (30% vs. 10%)
- ▶ While most agree that urban/downtown areas are the most in need or appropriate for growth and development, only 8% would prefer to live downtown

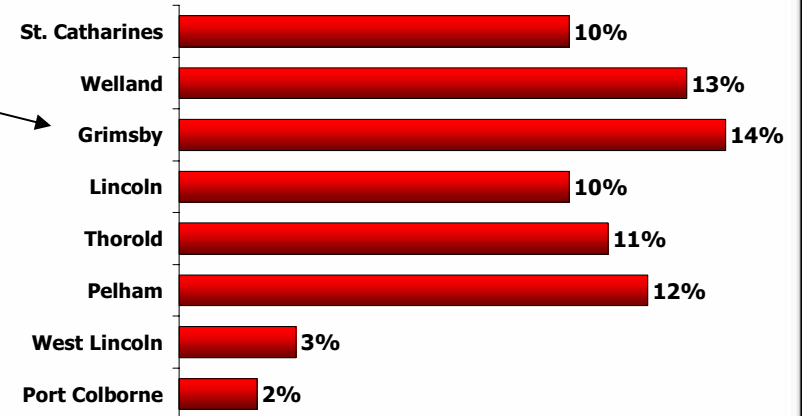
Q7. Please tell me how much you agree or disagree with the following statements? Base: All adult Niagara area residents (n=1201)

Most Commonly, Residents Plan to Move for Employment Reasons

Most Common Reasons for Planning to Move



Plan to Downgrade - By Municipality

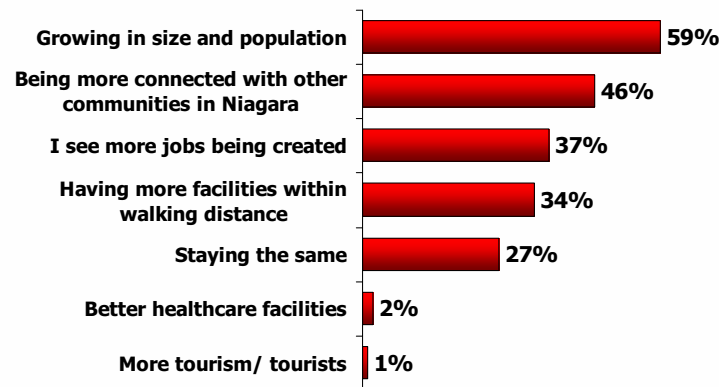


- ▶ While reasons for moving vary, 15% say they expect to change jobs and an additional 1 in 10 say they plan to downgrade their home or retire in the next 10 years (9% each)
- ▶ More residents of St. Catharines, Welland, Grimsby, Lincoln, Thorold and Pelham are planning to downgrade than those in West Lincoln or Port Colborne
- ▶ While 4% say they will move for job relocations, 14% of those in Fort Erie say this is true for them, more than any other municipality
- ▶ Only 8% say they do not plan on moving, but those who are retired and over the age of 66 are more likely to say this (15% vs. 18 to 55 year olds: 5%)

Q8. If you are planning on moving from your neighbourhood / community in the next 10 years, what are the reasons? Base: All adult Niagara area residents (n=1201)

7 in 10 Niagara Area Residents Envision Their Community Changing in the Next 20 Years, Most Commonly in Size and Population

How Residents Envision Their Community 20 Years From Now



Residents Who Envision Their Community Growing in Size and Population – By Municipality	
St. Catharines	52%
Welland	55%
Grimsby	75%
West Lincoln	80%
Port Colborne	32%
Niagara on the Lake	72%
Niagara Falls	65%
Fort Erie	66%
Lincoln	59%
Thorold	59%
Pelham	62%
Wainfleet	58%

- ▶ More than anything, Niagara area residents see their community growing in size and population (59%), especially those residing in Grimsby and West Lincoln
- ▶ 62% of those living in low to medium density areas also expect their community to grow versus 35% of those who live in high density areas
- ▶ 46% expect their community to be more connected with other communities in Niagara and 37% see more jobs being created
- ▶ 27% see their community staying the same size

Q23. How do you envision your community 20 years from now? Base: All adult Niagara area residents (n=1201)

Respondent Profile

Toronto

Edmonton

Calgary

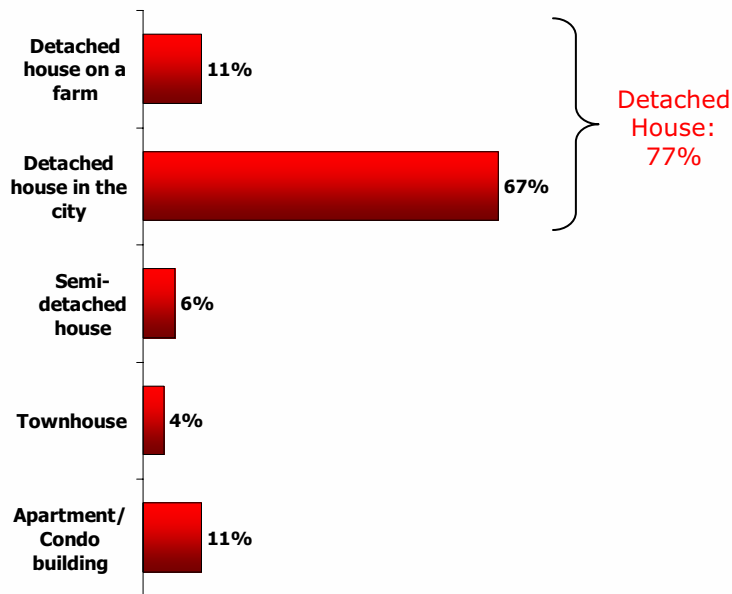
Montreal

Philadelphia

New York

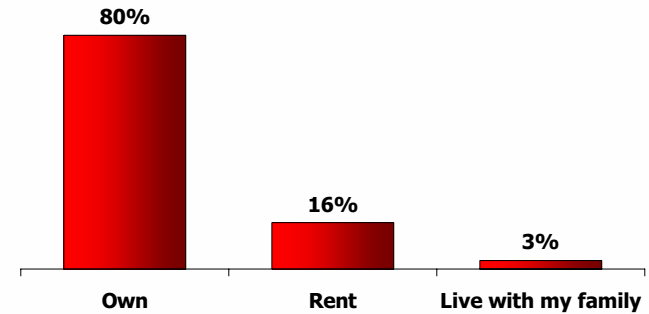
Residency Profile

Type of Residence



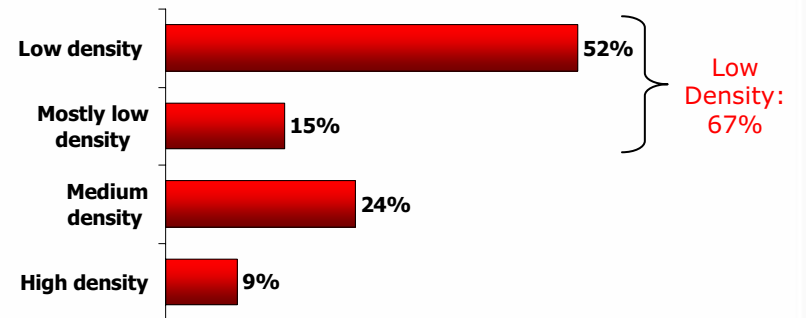
Q1. What type of a residence do you currently live in?
Base: All adult Niagara area residents (n=1201)

Ownership / Rental of Residence



Q9. Do you currently own or rent the residence in which you live?
Base: All adult Niagara area residents (n=1201)

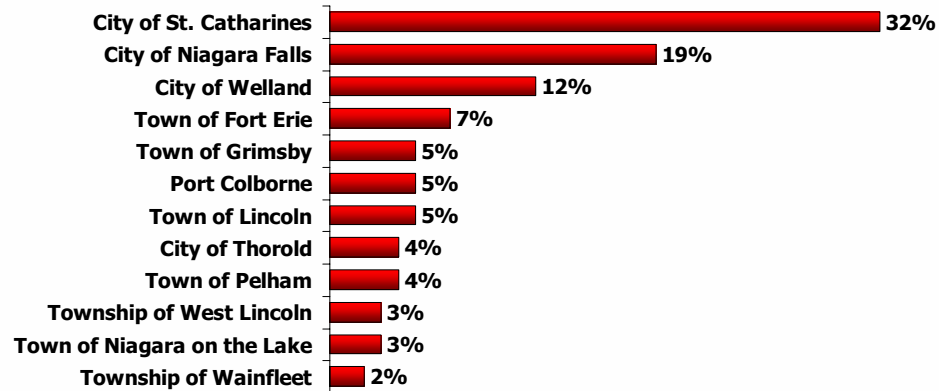
Density of Housing in Neighbourhood



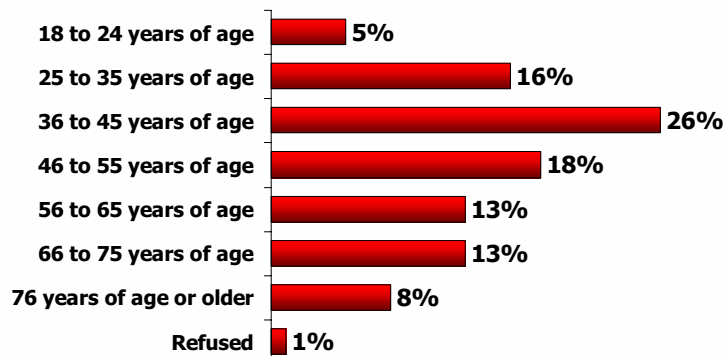
Q2. How would you describe the density of the housing in your neighbourhood?
Base: All adult Niagara area residents (n=1201)

Demographics

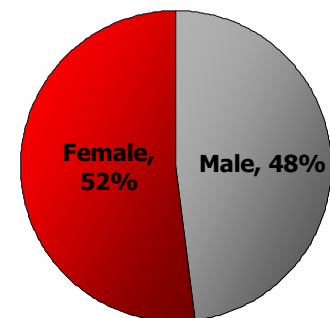
City



Age

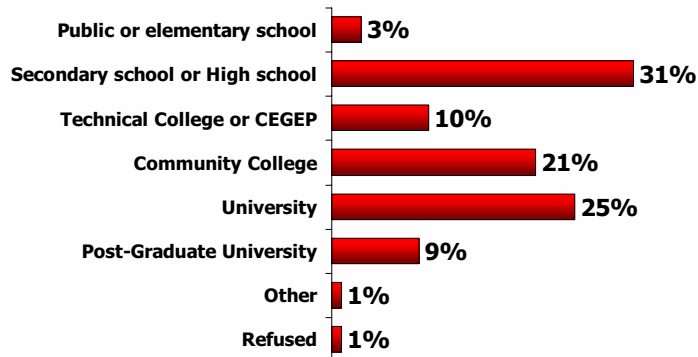


Gender

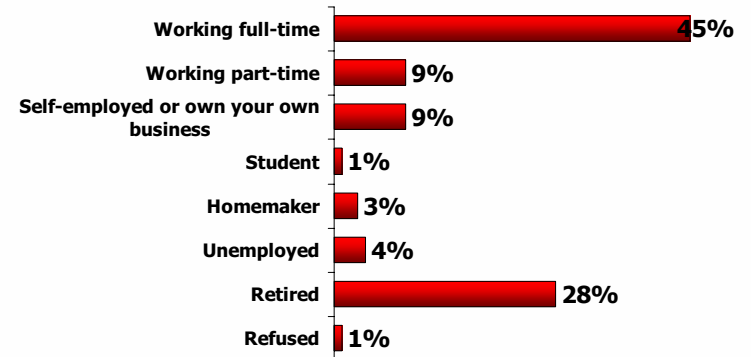


Demographics Cont...

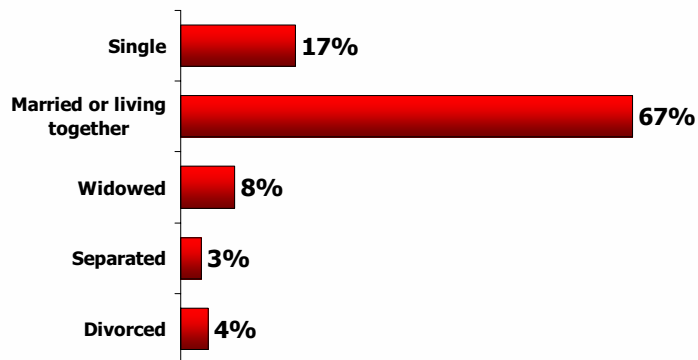
Education Level



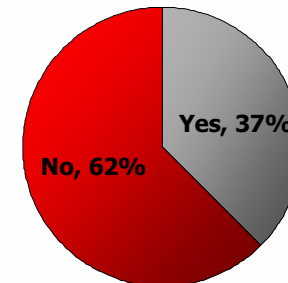
Employment Status



Marital Status

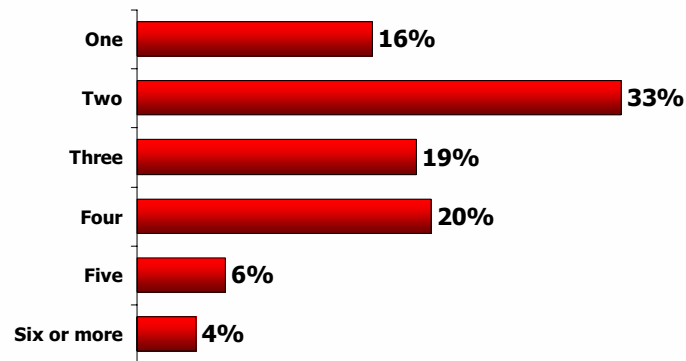


Children in Household <18 Years of Age?

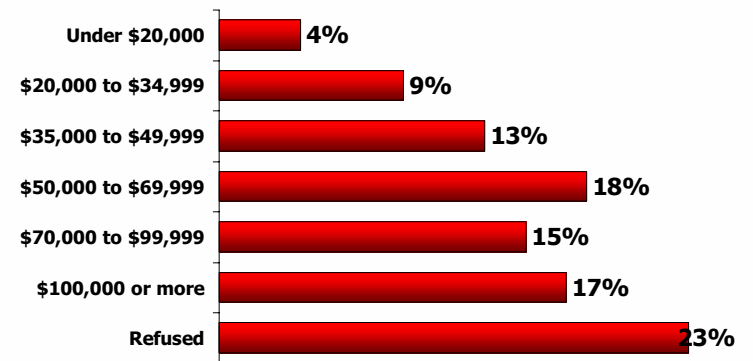


Demographics Cont...

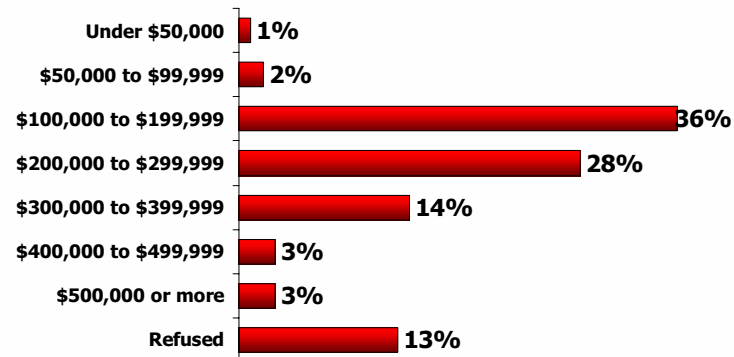
Number of Household Occupants



Household Income



Home Value



Contact Information

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