



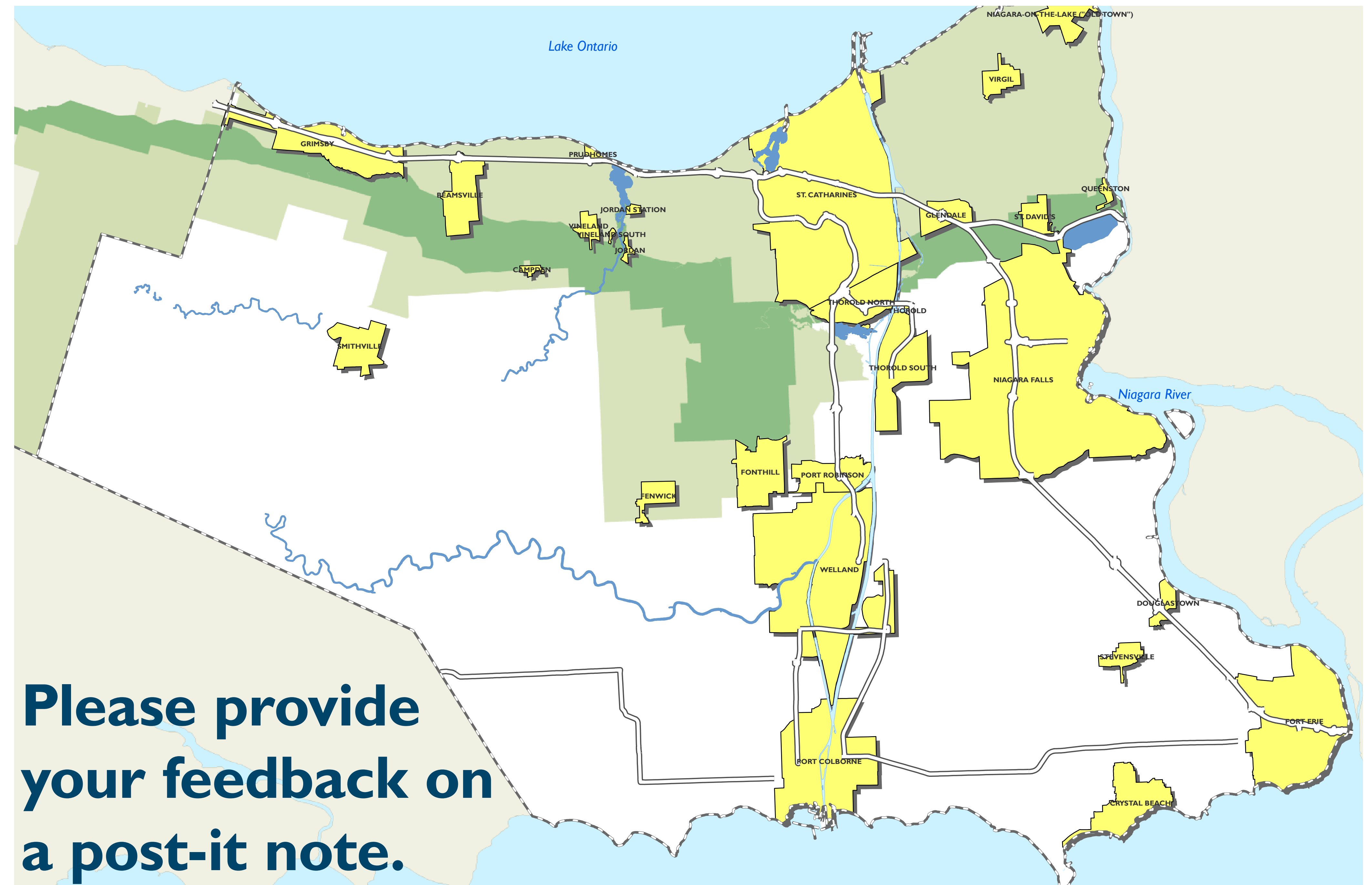
HOW WE GROW

Welcome

Thank you for attending the third Public Information Centre for Niagara 2041. Here, you will have an opportunity to learn about four important studies which are being undertaken to examine how we grow, how we flow, and how we go. You will also have an opportunity to learn how these studies are working together to create Niagara 2041 - the Region's new Growth Plan, which will direct development in Niagara Region over the next 25 years. If you have any comments, please write them on a post-it note and stick them directly on the applicable presentation panel.

Contact Us

If you have any comments or questions regarding Niagara 2041 or the Master Plan processes, or you would like to be added to the study mailing list, please contact one of the following Project Managers, and they will be happy to assist you. You can also visit www.niagararegion.ca/2041 for more information.



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HOW WE GROW

Growth Plan Forecasts In Niagara

Overview

The Province has forecast a 2041 Population of 610,000 persons and Employment of 265,000 jobs that Niagara Region must plan for.

This represents an increase of 168,000 persons and 80,000 jobs. This is an aggressive target - almost equivalent to the present day population of St. Catharines, Thorold and Niagara-on-the-Lake combined.

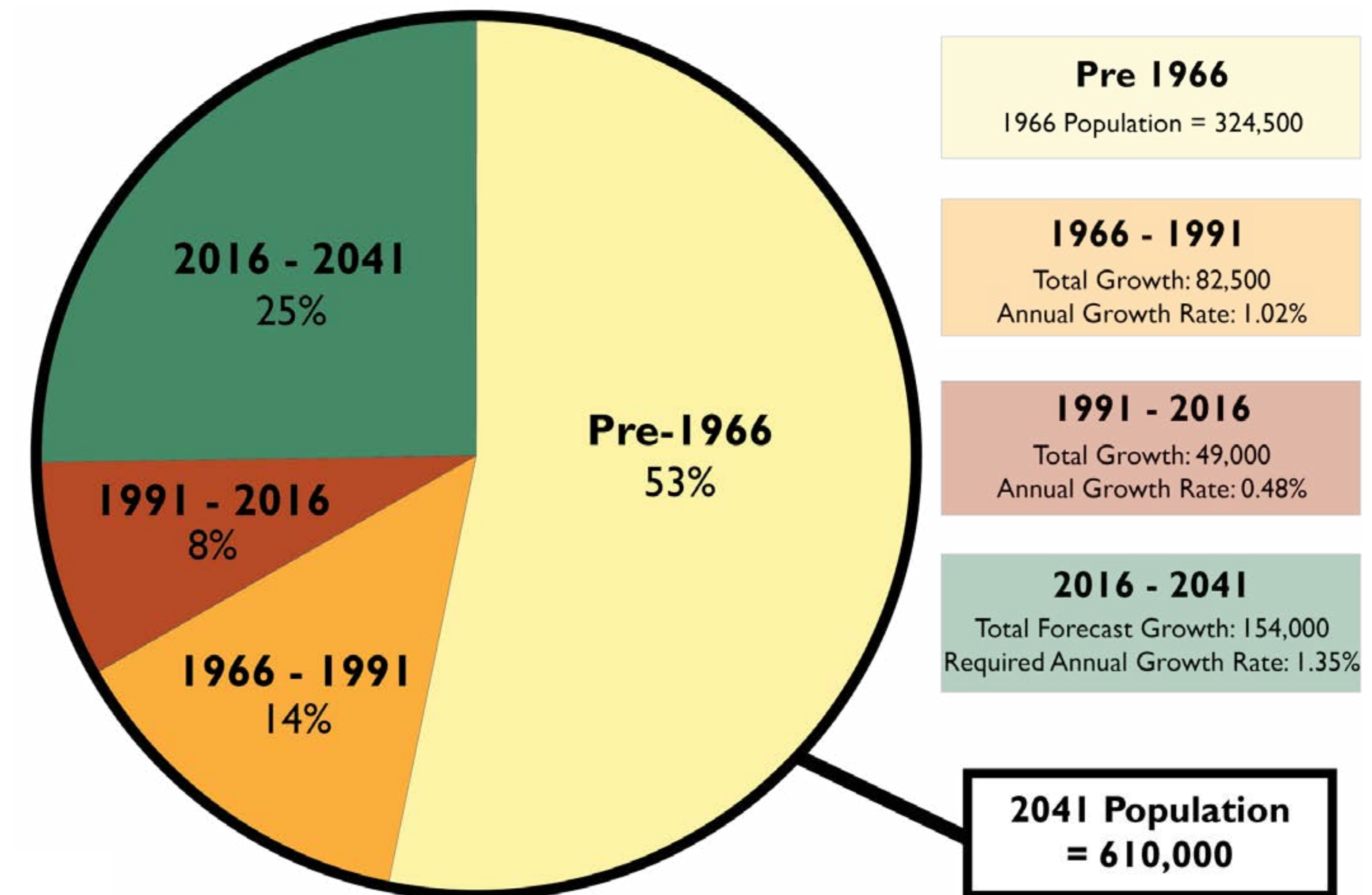
Population and employment growth are linked and together provide the opportunity to re-ignite the Regional economy through business development, new housing, infrastructure, research and innovation, and assessment growth.

Planning for Growth

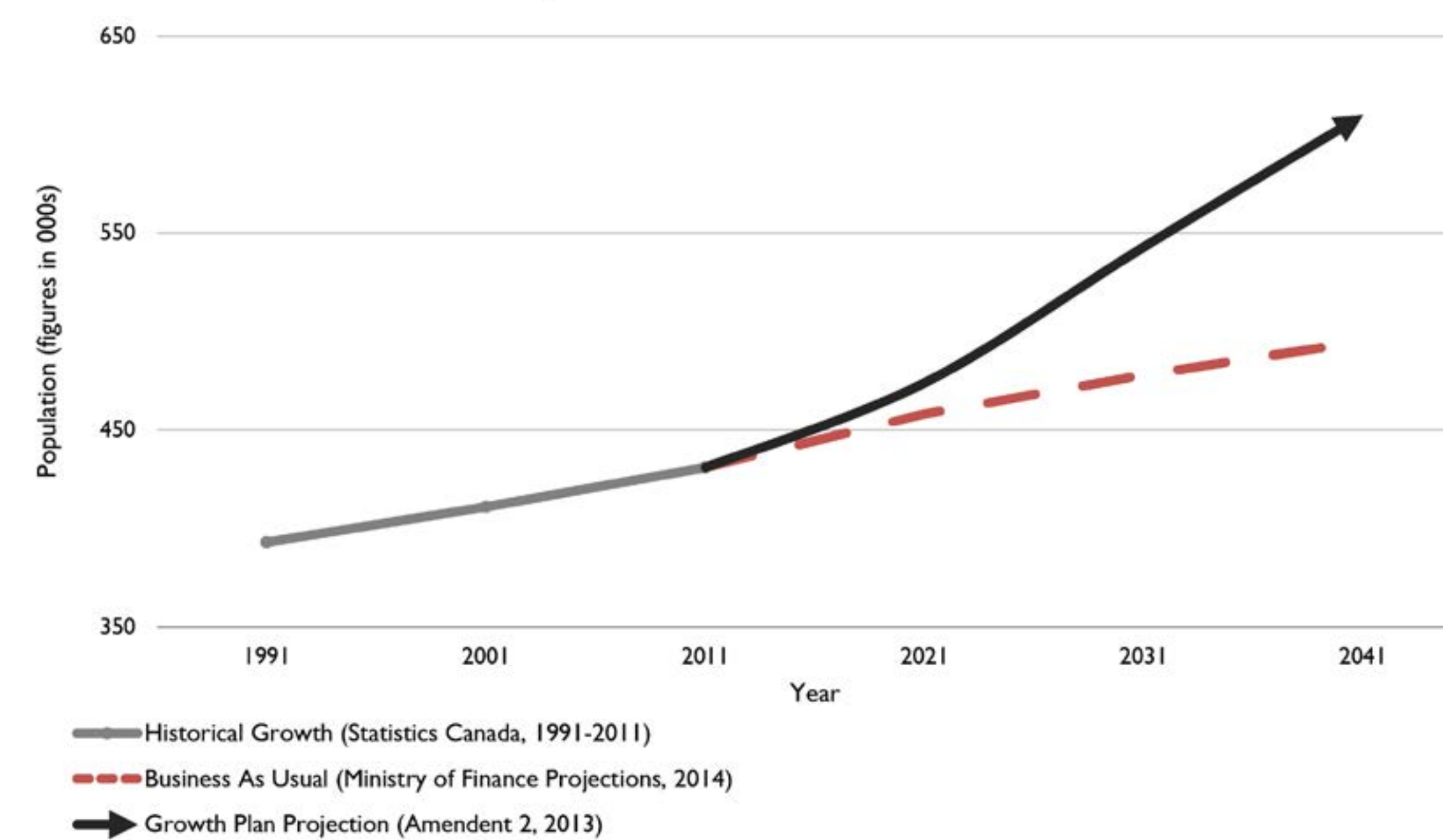
Three key success factors include:

1. Understanding the magnitude and nature of Niagara's expected growth.
2. Setting out a clearly defined urban vision and growth strategy.
3. Building on a collaborative-based approach across the Region, in partnership with Local Area Municipalities to drive planning program(s) forward.

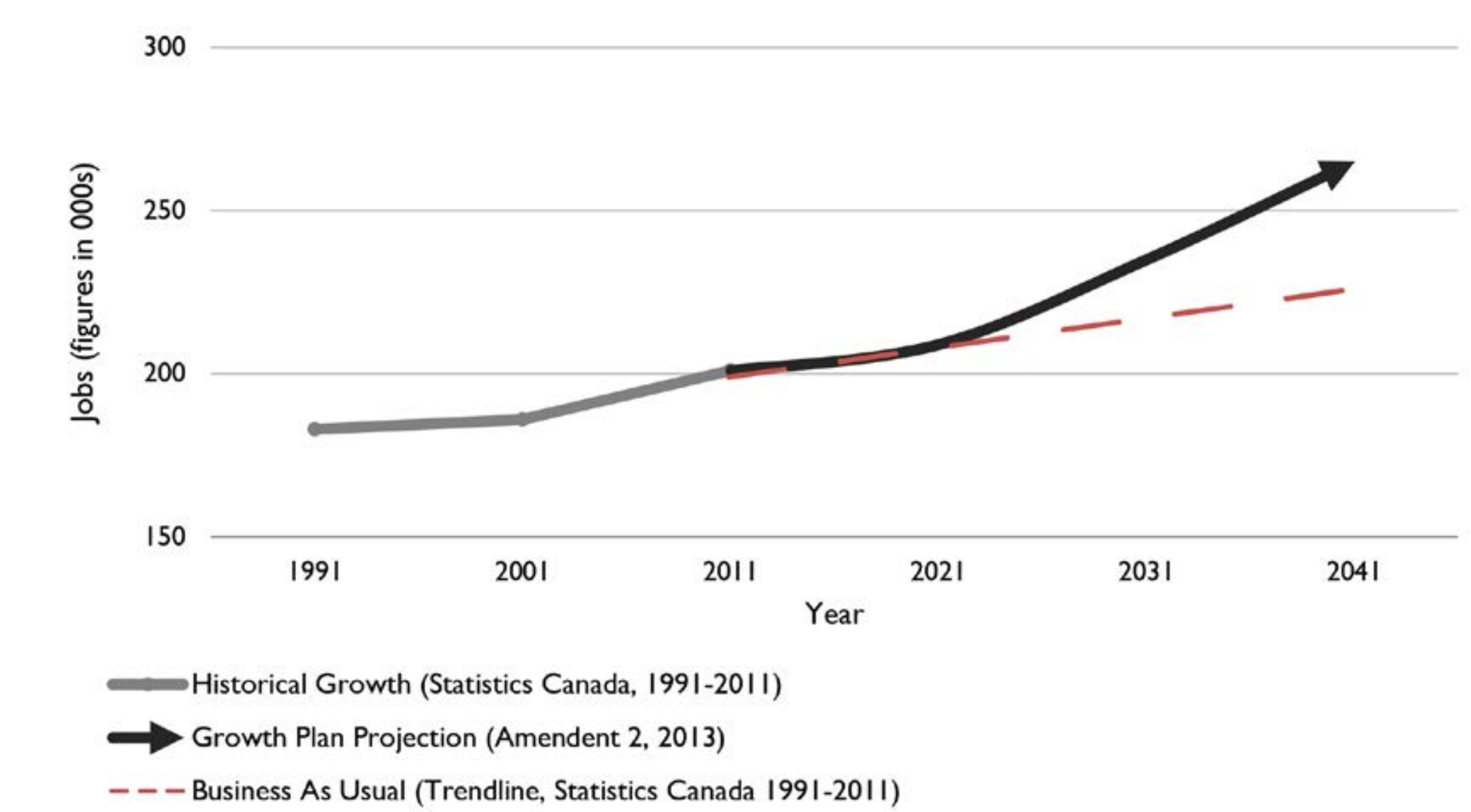
Historic & Projected Growth



Population Forecast to 2041



Employment Forecast to 2041

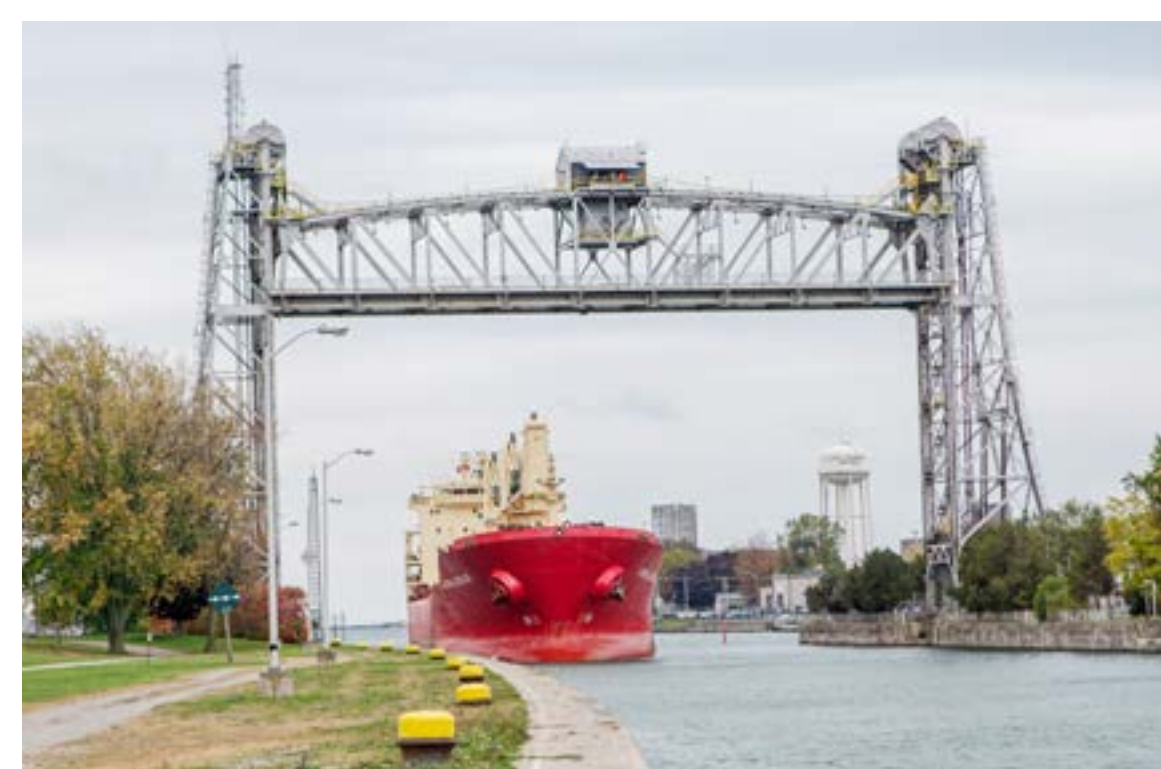




HOW WE GROW

Study Overview

Niagara Region is pro-actively planning for new growth, in conformity with Places to Grow - the Growth Plan for the Greater Golden Horseshoe. Through the Niagara 2041 study process, the Region will develop a Growth Plan to accommodate anticipated population and employment growth over the next 25 years. The plan will be urban in nature, and will involve completion of the following 3 inter-connected studies, which together form the foundation to support and foster Niagara's growth.



Municipal Comprehensive Review (MCR) - How We Grow

The MCR will examine priorities and potential for growth and development over the next 25 years, and will identify where and how growth will be accommodated in Niagara Region. The MCR is an Official Plan Review. It has been initiated by Niagara Region, and applies the policies and schedules of Places to Grow - Growth Plan for the Greater Golden Horseshoe, 2006. The last MCR, Niagara 2031, will be reviewed and updated, as required, based on growth trends which have occurred since 2006.



Transportation Master Plan (TMP) - How We Go

The TMP will direct how Niagara Region's transportation system will be designed, who it will accommodate, and what investments will be needed. It will provide a data model for future transportation needs, inform strategic infrastructure investments, and establish a vision for how residents will move within and throughout Niagara Region. The recommendations of the TMP will complement the preferred growth option, which will be developed through the MCR, and will inform an upcoming Regional Development Charges Background Study.



Water / Wastewater Master Servicing Plan (MSP) - How We Flow

The MSP will determine how Niagara Region's servicing infrastructure will support growth in a sustainable and financially responsible manner over the next 25 years. It will evaluate the growth strategy options, which will be developed through the MCR, and will provide a proposed project list and capital forecast based on the preferred growth option, while informing the Regional Development Charges Background Study. The MSP will investigate key water and wastewater operations, providing guidance on their optimization, and will be coordinated with local municipalities to synchronize infrastructure and servicing capacity information.



Development Charges By-Law (DC By-Law) - How We Grow

The new Development Charges Background Study and By-law will align the infrastructure for our expected growth and how we will pay for it. It will connect with and reflect how we plan to grow, flow and go.





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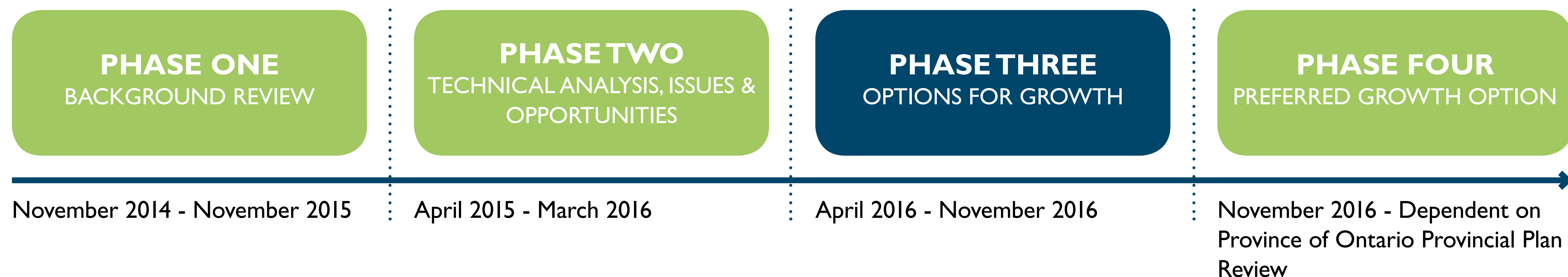
What is a Municipal Comprehensive Review?

A Municipal Comprehensive Review (MCR) is a comprehensive review of the Region's growth management policies and allocation of population and employment growth to the local municipalities. The MCR reviews and determines appropriate intensification targets, identifies changes to land supply designations and may justify urban boundary expansions.

The MCR addresses three key questions

- Is there sufficient land designated for intensification and new greenfield development to accommodate growth?
- Where should this growth be accommodated across Niagara Region?
- How should this growth be accommodated across Niagara Region to meet the strategic objectives of Regional Council?

Project Schedule





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Phase 1 and 2: Current Conditions and Trends

Phases 1 and 2 involved extensive research into growth patterns and history across Niagara as well as a high level assessment of the policy framework in place to implement the current growth management plan adopted in 2009. This work involved extensive consultations with the planning staff from area municipalities as well as consultation with other stakeholders.

The first round of Public Information Centres in November 2015 presented key findings of this research and sought input into the challenges and opportunities the Region faces in managing growth.

The Phase 1 and 2 Report was presented to Regional Council's Planning & Development Committee on May 11, 2016.

Phase 3: Options for Growth

Options for Growth were first presented at the second round of Public Information Centres in June 2016. Three approaches were presented - Current Policy, Market Driven and Strategic Growth. Through consultation with the public, stakeholders and the Niagara 2041 team, the Strategic Growth option was identified as the preferred option for growth in Niagara.

The following panels describe the preferred growth option and outline population and employment forecasts for each of Niagara's twelve municipalities.

Phase 4: Preferred Growth Option

Phase 4 will determine if there is enough designated land in Niagara to accommodate population and employment forecasts. Urban area boundaries across Niagara's eleven municipalities will be reviewed and, if necessary, recommendations for adjustment will be presented. Phase 4 will conclude with an implementation strategy for Niagara's update growth strategy.





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Planning for Growth in Niagara

Key policy directions from the Province must be addressed

- The **Greenbelt Plan** and the **Niagara Escarpment Plan** protect significant areas of the countryside from urban development
- The **Growth Plan for the Greater Golden Horseshoe (2006)**:
 - Requires municipalities to plan for sufficient land to accommodate residential growth for the next 25 years (2041) and provides support for longer-term planning for employment land
 - Provides the forecasts of population and employment that the Region must plan for to 2041
 - Requires an emphasis on intensification and higher population and employment densities on greenfields
 - Requires employment lands to be protected from conversion to non-employment uses unless justified through a Municipal Comprehensive Review

The **Regional Official Plan** builds on Provincial policy, providing direction for planning and growth management in Niagara. The MCR will help to support the **Strategic Objectives of Regional Council** and Niagara's vision for the Region with an emphasis on economic development, sustainable growth and healthy, complete communities.

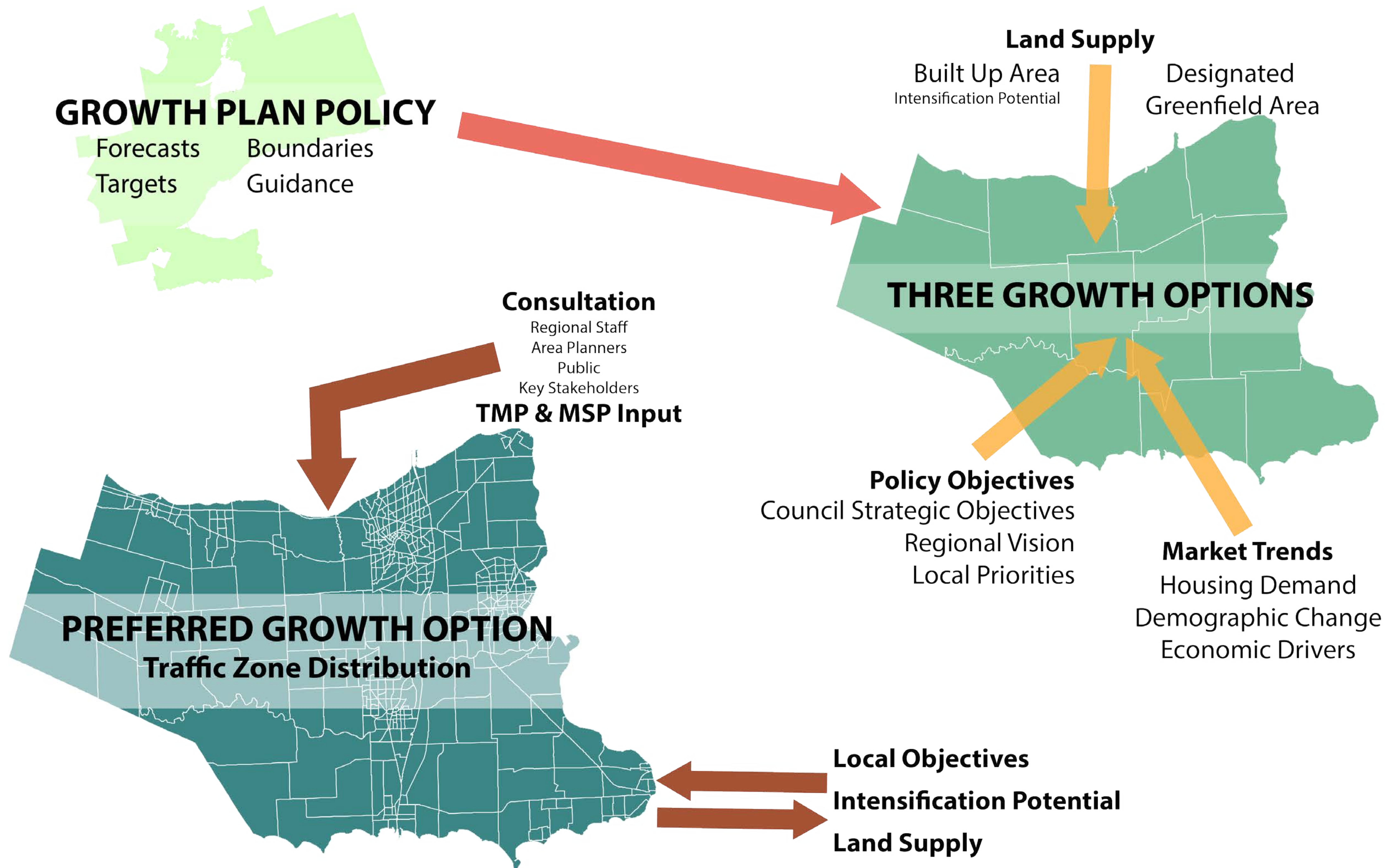
Approaches

- The Region must plan for sustainable population and economic growth in such a way that supports current and emerging Provincial policy
- The Region needs to plan for a more focused urban future, one that makes the best use of existing infrastructure and positions the Region to achieve strategic goals as expressed by Regional Council
- Through consultation with the public and municipal partners, the Strategic Growth Option has emerged as the preferred growth option for Niagara
- The next panels discuss an emerging strategy to realize the growth assigned to Niagara in a way that protects what is valuable and stimulates economic growth. Contrasting approaches are also shown





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Current Policy Approach

What if we don't change the current policy framework?

- Continuation of the current policy framework and allocation of shares of growth was also examined
- Current policy is based on a lower level of growth for the Region overall to 2031 and does not look beyond that to 2041. Continuing the current policy approach may generate unrealistic growth expectations for some municipalities
- Less of an emphasis on planning for GO Rail service to the Region and other linkages to the GTAH

Region-wide intensification rate: 46%

Potential Implications

- Region less likely to achieve growth forecast for 2031, and especially 2041
- Market for intensification has been limited
- Continued emphasis on low density single detached housing largely in greenfield settings
- Likely continuation of lower economic growth trend
- Does not meet the future intent of new provincial policies





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Market Driven Approach

Where does the market want to grow?

- Emphasizes the influence of the Greater Toronto and Hamilton Area economy
- Population growth weighted to north and west municipalities
- Significantly lower allocations of growth to southern municipalities

Potential Implications

- Market pressure in areas surrounded by Greenbelt may limit options for accommodating growth
- Significant increases in intensification rates would have to be considered by some municipalities
- Does not address broader policy objectives of building complete communities, transit-oriented development and providing a range of housing choice

**Region-wide intensification rate:
54%**





HOW WE GROW

Strategic Growth Approach

What urban strategy does the Region need to attract growth and manage it to benefit the entire Region?

- Addresses Provincial Policy directions and strategic directions adopted by Regional Council
- Growth focused along QEW corridor as well as nodal concentrations in Downtown St. Catharines and at future GO Train Stations in Grimsby, St. Catharines and Niagara Falls
- Recognizes current land supply potential, increased intensification rates and facilitates higher densities in new greenfield development
- Acknowledges the variation in market demand across the Region and sluggish growth since adoption of growth management strategy in 2009

Region-wide intensification rate: ~60%

Potential Implications

- Implements an urban structure that is geared to attracting and retaining population and jobs
- Focus areas for growth will help the Region capitalize on the extension of GO rail service in 2021 and 2023
- Protects Greenbelt, tender fruit lands and natural heritage
- Could foster development of complete communities and transit-supportive densities
- Higher intensification targets may be difficult for some municipalities to achieve
- Region may need to work with municipalities where slower growth suggests there is already excess land designated for urban uses





HOW WE GROW

Preferred Growth Option

Building on the analysis and consultation undertaken over the first 3 phases of the MCR, the Strategic Growth Option has been refined and is put forward here as a preferred growth allocation for moving forward with all elements of Niagara 2041. This growth option is predicated on a desire to focus much of the growth in settlement areas where it can best be serviced while creating complete communities, recognizing current and emerging Regional market pressures, the diversity of urban, rural and agricultural communities in the Region as well as broader policy objectives of the Growth Plan and the Region, including enhancing the Region's relationship to the western GTA economy. The refined Strategic Growth Option presented herein is the result of detailed consultation with local municipalities regarding land supply and intensification potential. It supports Regional objectives for growth and development and provides a basis for long-term prosperity and economically viable infrastructure investment in the Region.

With Greenbelt boundaries assumed to remain fixed (until such time that the Province suggests otherwise), this option recognizes the current land supply potential, and is forward-looking to the proposed draft Growth Plan, 2016 policies, supporting increased intensification rates and higher greenfield development densities. The weighted shares of growth are allocated to municipalities with the capacity, ability and market to both intensify and fill out their committed greenfield land supply.

Ranking of Options

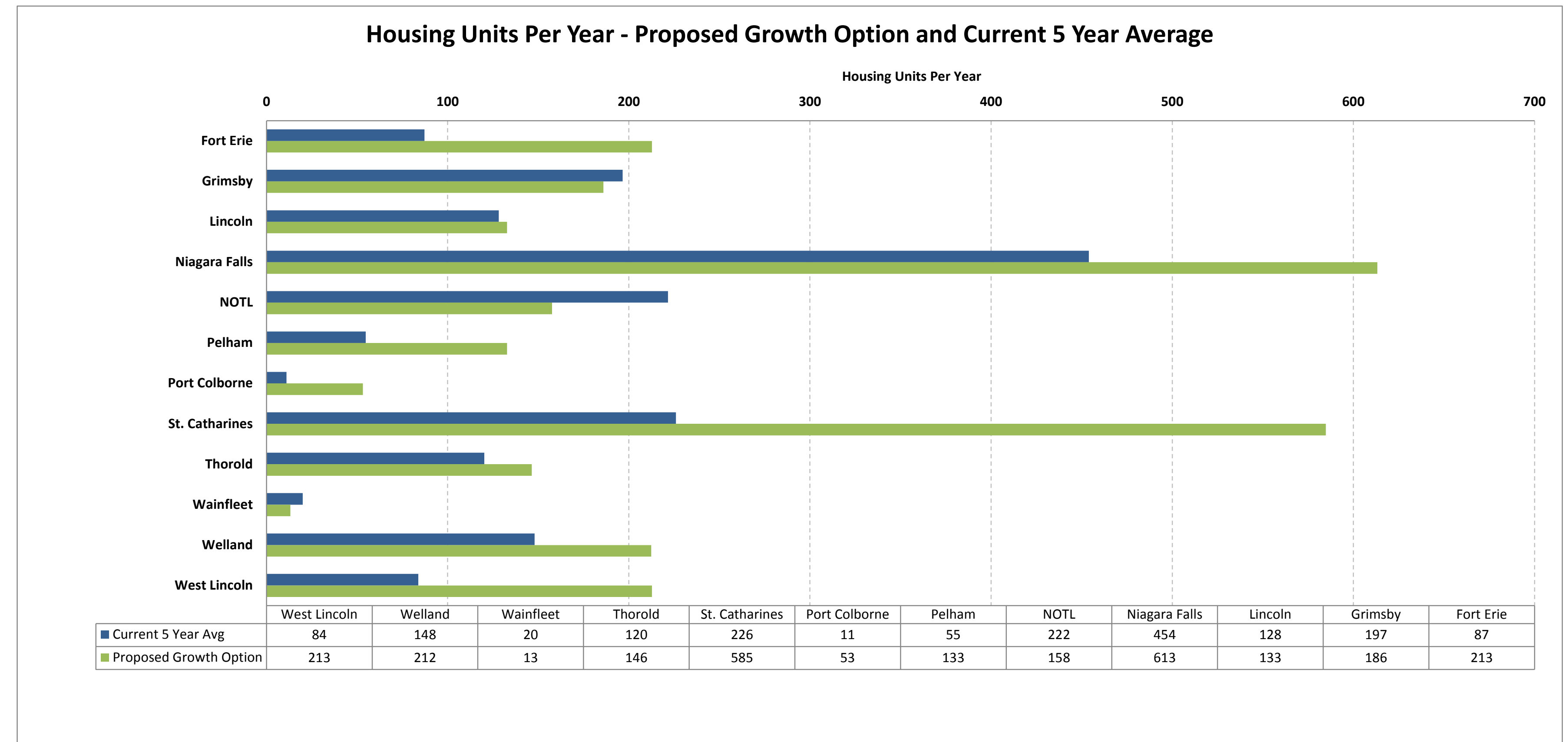
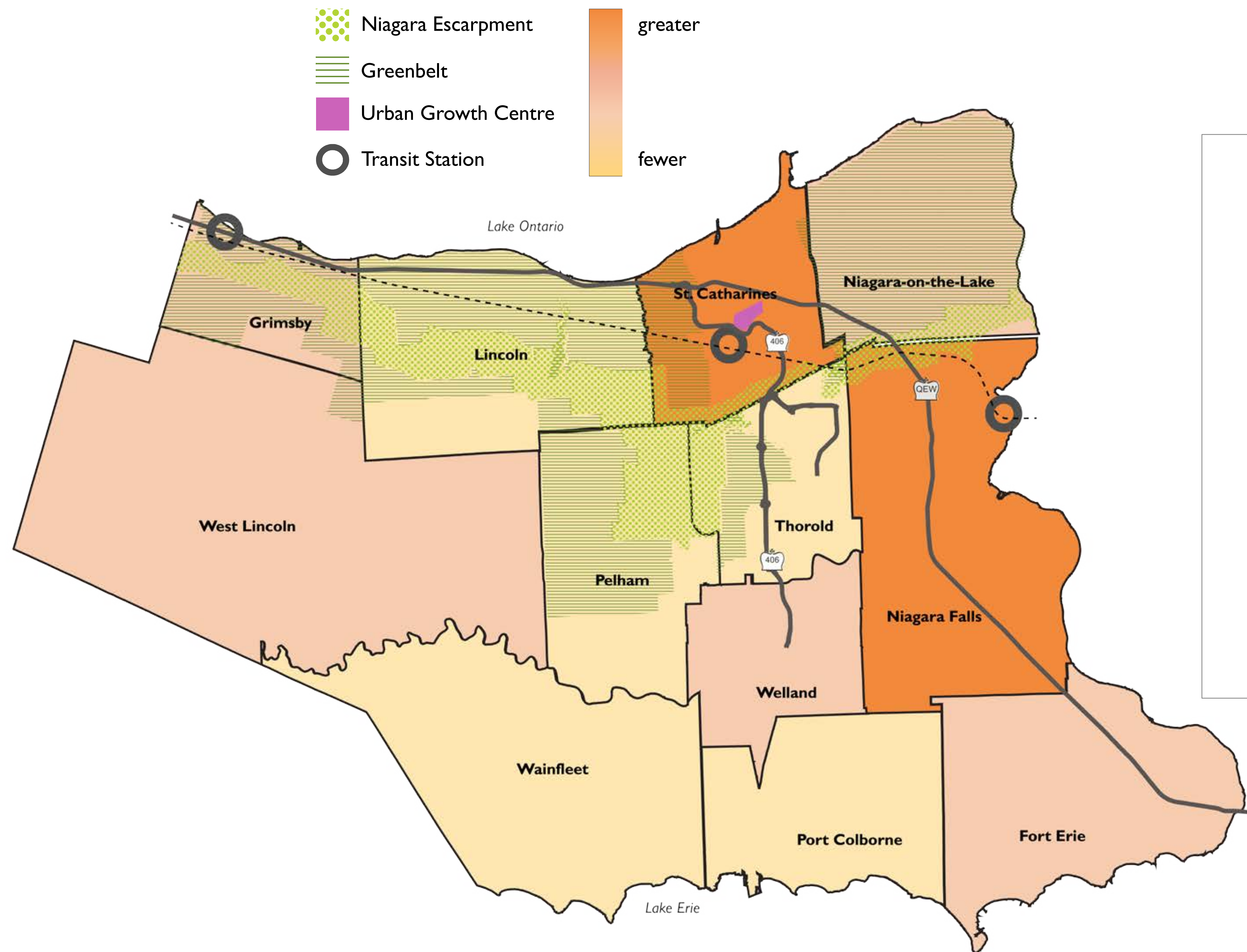
	OPTION 1 Current Policy	OPTION 2 Market Driven	OPTION 3 Strategic Option
INFRASTRUCTURE	Red	Yellow	Green
LAND USE / SUSTAINABILITY	Yellow	Red	Green
COUNCIL STRATEGIC OBJECTIVE ALIGNMENT	Red	Yellow	Green
GROWTH PLAN ALIGNMENT	Yellow	Yellow	Green





HOW WE GROW

Shares of Regional Housing Unit Growth, 2016-2041



MCR Strategic Growth Option Forecast Total Population by Local Municipality, 2016 -2041											
Municipality	Total Population Including Net Undercoverage									2016 - 2041	
	2001	2006	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
Fort Erie	29,120	30,960	30,760	31,030	32,310	34,720	37,780	41,220	43,940	12,910	1.40%
Grimsby	22,030	24,760	26,000	27,580	29,430	31,400	33,200	35,140	37,150	9,570	1.20%
Lincoln	21,320	22,460	23,080	23,950	24,990	26,230	28,060	30,030	31,590	7,640	1.11%
Niagara Falls	81,550	85,040	85,200	87,740	92,830	99,990	108,770	117,670	124,580	36,840	1.41%
Niagara-on-the-Lake	14,320	15,090	15,810	17,950	19,750	21,420	22,850	24,700	26,580	8,630	1.58%
Pelham	15,790	16,710	17,040	17,190	17,900	19,410	21,560	23,720	25,260	8,070	1.55%
Port Colborne	19,080	19,240	18,910	18,510	18,600	19,210	20,080	21,050	21,820	3,310	0.66%
St. Catharines	133,660	136,570	134,890	133,820	136,930	142,560	150,590	160,040	167,480	33,660	0.90%
Thorold	18,670	18,880	18,410	18,790	19,680	21,500	23,850	26,470	28,470	9,680	1.68%
Wainfleet	6,470	6,830	6,520	6,540	6,590	6,760	6,990	7,260	7,480	940	0.54%
Welland	50,080	52,080	51,980	52,550	54,130	56,540	59,600	63,160	66,180	13,630	0.93%
West Lincoln	12,690	13,620	14,200	14,670	16,170	18,930	22,630	26,530	29,460	14,790	2.83%
Niagara Region	424,780	442,240	442,800	450,320	469,310	498,670	535,960	576,990	609,990	159,670	1.22%

MCR Strategic Growth Option Forecast Employment by Local Municipality, 2016 -2041											
Municipality	Total Place of Work Employment									2016-2041	
	2001	2006	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
Fort Erie	11,580	11,920	11,290	12,460	13,270	13,960	14,920	15,940	17,240	4,780	1.31%
Grimsby	6,820	8,140	7,720	9,870	10,780	11,440	12,380	13,310	14,630	4,760	1.59%
Lincoln	9,430	10,340	9,740	11,280	11,870	12,300	13,040	13,710	14,600	3,320	1.04%
Niagara Falls	37,410	42,250	41,030	45,360	47,790	49,630	52,060	54,570	57,720	12,360	0.97%
Niagara-on-the-Lake	10,090	11,050	10,650	13,010	13,720	14,150	14,660	15,230	16,030	3,020	0.84%
Pelham	4,020	4,290	4,090	4,540	4,880	5,220	5,750	6,280	6,930	2,390	1.71%
Port Colborne	6,500	6,810	5,860	5,770	5,900	6,080	6,350	6,640	7,000	1,230	0.78%
St. Catharines	63,180	66,080	60,180	62,660	65,530	67,820	71,480	75,240	80,240	17,580	0.99%
Thorold	8,010	8,340	7,360	8,070	8,480	8,870	9,390	9,960	10,660	2,590	1.12%
Wainfleet	1,470	1,520	1,160	1,300	1,350	1,400	1,470	1,550	1,650	350	0.96%
Welland	20,970	20,280	22,090	23,590	24,490	25,170	26,220	27,300	28,760	5,170	0.80%
West Lincoln	3,390	3,980	4,280	5,150	5,770	6,370	7,270	8,280	9,560	4,410	2.51%
Niagara Region	182,870	195,000	185,450	203,060	213,830	222,410	234,990	248,010	265,020	61,960	1.07%

