



MUNICIPAL COMPREHENSIVE REVIEW

Phase I and 2 Background Report

Niagara  Region

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March 11, 2016



Executive Summary

The Regional Municipality of Niagara is undertaking a review of the *Regional Official Plan. Niagara 2041* will lead to changes in planning policy for Niagara in keeping with Provincial policy direction and evolving conditions. Hemson Consulting Ltd, Macaulay Shiomi Howson and Brook McIlroy are undertaking a Municipal Comprehensive Review (MCR) for the Region as part of the Niagara 2041 Official Plan Review process.

Niagara Region is forecast to grow to a population of 577,000 by 2036, and 610,000 by 2041 under Schedule 3 of the *Growth Plan for the Greater Golden Horseshoe*. The MCR will help the Region to plan for this growth by addressing the following questions:

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

This exercise has key linkages with other elements of *Niagara 2041*. In particular, the analysis and assessment arising from the MCR will feed into and be informed by the Transportation Master Plan (TMP) and the Water & Wastewater Master Servicing Plan (MSP), projects recently initiated by the Region as well as a Transit Hubs and Stations study. The elements of the MCR project which will be most relevant to these other initiatives include:

- Analysis of recent trends – How, where and why has the Region been growing? What are the current and emerging growth pressures?
- Assessment of land supply – How much growth can be accommodated on designated Greenfields and how much potential is there for intensification?
- Forecast of growth – Given market trends, land capacity and planning policy, how much growth should be assigned to each local municipality?

- Do the designated urban boundaries need to be change – expanded, or reduced – to reflect expectations for growth in various housing types and forms of employment?
- This MCR Phase 1 & 2 Background Report presents key information on social and economic trends across the Region, sets the policy context for the study, and provides the results of the Regional land supply inventory review and preliminary capacity analysis.

Key findings to date include:

- Niagara is not growing at a fast pace overall and the growth which is occurring varies significantly across the Region. Meanwhile, the pattern of growth, largely reflecting demand for new housing, has not materially changed in recent years.
- New housing demand is outpacing the net increase in population, reflecting an aging population.
- The decline in Ontario's manufacturing base in recent years has affected Niagara's economic prospects, although the Region has many opportunities to enhance its economic outlook going forward.
- Similar to many communities outside of the Province's major urban centres, Niagara is experiencing the out- migration of young adults to education and employment opportunities, while some communities within the Region remain quite attractive to those over 60 years of age.
- Recent housing development in the Region suggests that Niagara is already meeting its *Growth Plan* general intensification target, however the extent to which this meets the intent of intensification policy is less certain. The supply for intensification is abundant and many Niagara municipalities are planning for higher densities and redevelopment within built up areas.
- The capacity to accommodate population and employment growth is also unevenly distributed across Niagara municipalities, which could pose challenges for planning to meet the Region's Schedule 3 outlook. The distribution of vacant urban designated land across a geographically large and dispersed Region is in some areas misaligned with pressures for growth.
- Given the broader demographic and economic trends, along with changes to Provincial policy, it is time to review that policy framework in the context of

the updated *Growth Plan* forecasts to 2041 that the Region must now plan for, in a manner which reflects emerging trends locally and changes to provincial policy guidance.

The next phases of the study will involve:

- Describing and quantifying options for growth over the long term;
- Working with stakeholders, the public, and infrastructure planners to evaluate the options and determine a preferred growth option; and
- Making recommendations for amending the *Regional Official Plan*.

In addition to this report, further research and analysis, will be presented to the public through the project website and at Public Information Centres, and will be the focus of discussion at Workshops for municipal stakeholders.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
I INTRODUCTION.....	1
A. MANAGING GROWTH AND CHANGE.....	3
B. REPORT CONTENTS	4
II PUBLIC INITIATIVES INFLUENCING GROWTH AND CHANGE.....	6
A. HOW DO PUBLIC AGENCIES INFLUENCE GROWTH AND CHANGE? ...	7
B. WHAT ARE THE KEY PROVINCIAL POLICY INITIATIVES?	7
C. WHAT INITIATIVES HAS THE REGION UNDERTAKEN WITH RESPECT TO GROWTH MANAGEMENT?	12
D. WHAT INITIATIVES HAVE THE LOCAL MUNICIPALITIES UNDERTAKEN WITH RESPECT TO GROWTH MANAGEMENT?	16
E. PROVINCIAL POLICY GUIDES HOW NIAGARA WILL NEED TO ACCOMMODATE GROWTH	17
III RECENT TRENDS REINFORCE PATTERN OF GROWTH ACROSS THE REGION	19
A. SLOWING GROWTH TREND UNEVENLY EXPERIENCED AMONG NIAGARA MUNICIPALITIES	19
B. DEMOGRAPHIC TRENDS INFLUENCE GROWTH AND CHANGE IN THE REGION.....	21
C. HOUSING GROWTH SLOWED BUT CONTINUES TO OUTPACE GROWTH IN POPULATION	24
D. EMPLOYMENT	28
E. MEASURING PROGRESS.....	35
IV SIGNIFICANT POTENTIAL TO ACCOMMODATE GROWTH ON REGIONAL LAND SUPPLY.....	40
A. REGIONAL LAND BUDGET APPROACH AND RESULTS.....	40
B. WHERE HAS GROWTH BEEN OCCURRING ON NIAGARA'S LAND SUPPLY?	42
C. CLASSIFYING THE SUPPLY	44
D. NIAGARA APPEARS TO BE ACHIEVING ITS GROWTH PLAN MINIMUM INTENSIFICATION TARGET BUT A CAUTIONARY APPROACH IS SUGGESTED	47
E. POTENTIAL DISCONNECT BETWEEN LOCATIONS OF LAND SUPPLY AND HOUSING DEMAND	51
F. CAPACITY TO ACCOMMODATE FUTURE GROWTH VARIES WIDELY AMONG NIAGARA MUNICIPALITIES	53
G. LOOKING FORWARD – WHAT DOES IT MEAN FOR THE MCR?.....	59

V	RECOGNIZING CHALLENGES AND OPPORTUNITIES	60
A.	CHALLENGES AND OPPORTUNITIES.....	61
B.	MOVING FORWARD: DEVELOPING AND EVALUATING OPTIONS FOR GROWTH.....	65
VI	CONCLUDING REMARKS AND STUDY NEXT STEPS	68
Appendix A Niagara <i>Regional Official Plan</i> Growth Management Policy Direction		
Appendix B Niagara Region Area Municipal Growth Management Policy Direction		
Appendix C Niagara Region Land Supply Methodology Document		
Appendix D Niagara Region Land Supply Inventory – Figures and Mapping		

LIST OF TABLES, EXHIBITS AND MAPS

Table 1: Population & Employment Forecast Growth Plan Schedule 3, 2031, 2036 & 2041 pg. 3

Table 2: Population Growth, Niagara Region pg. 19

Table 3: Census Population by Local Municipality, Niagara Region 2001-2011 pg. 20

Table 4: Occupied Households, Niagara Region 1991-2011 pg. 24

Table 5: Persons Per Unit, Niagara Region 2001-2011 pg. 25

Table 6: CMHC Housing Completions, Niagara Region 2011-2016 pg. 26

Table 7: Occupied Households by Local Municipality, Niagara Region 2001-2011 pg. 26

Table 8: Residential Building Permits Issued by Local Municipality, Niagara Region 2011-2015 pg. 27

Table 9: Total Place of Work Employment, Niagara Region 2001-2011 pg. 28

Table 10: Total Resident Employed Labour Force, Niagara Region 2001-2011 pg. 32

Table 11: Total Place of Work Employment by Local Municipality, Niagara Region 2001-2011 pg. 32

Table 12: Total Resident Employed Labour Force by Local Municipality, Niagara Region 2001-2011 pg. 33

Table 13: Net Commuting by Local Municipality, Niagara Region 2006-2011 pg. 34

Table 14: Comparison – Niagara Region Official Plan & Census Results, Census Population 2011 pg. 37

Table 15: Comparison – Niagara Region Official Plan & Census Results, Occupied Households 2011 pg. 38

Table 16 Comparison – Niagara Region Official Plan (ROP) & National Household Survey Results Total Place of Work Employment 2011 pg. 38

Table 17: Regional Land Supply Inventory – Summary Regional Totals, Niagara Region 2015 pg. 41

Table 18: Regional Land Supply Review, Overall Inventory (Gross ha), Niagara Region 2016 pg. 44

Table 19: Redevelopment Supply (Ha) and Estimated Timing of Potential Redevelopment All Redevelopment, Niagara Region 2015 pg. 45

Table 20: Average Density of Planned Residential Development, Niagara Region pg. 51

Table 21: Average Persons Per Unit by Local Municipality, Niagara Region 2011-2041 pg. 55

Table 22: Estimated Capacity to Accommodate Residential Growth on Vacant Lands in Built Up Areas (BUAs), Niagara Region 2015 pg. 55

Table 23: Estimated Capacity to Accommodate Residential Growth on Vacant Lands in Designated Greenfield Areas (DGAs), Niagara Region 2015 pg. 55

Table 24: Vacant Designated Employment Land Supply, Niagara Region 2015 pg. 57

Table 25: Estimated Capacity of Vacant Designated Greenfield Area Employment Land Supply, Niagara Region 2015 pg. 58

Exhibit 1: Growth Plan Land Use Terminology pg. 17

Exhibit 2: Total Population Age Structure, Region of Niagara 2006 & 2011 pg.22

Exhibit 3: Total Population Age Structure, Region of Niagara 2011 & 2041 pg. 22

Exhibit 4: Migrant Age Structure, Niagara Region 2001-2011 pg. 23

Exhibit 5: Change in Place of Work Employment, Niagara Region 2001-2006 pg. 30

Exhibit 6: Change in Place of Work Employment, Niagara Region 2006-2011 pg. 30

Exhibit 7: Shares of Place of Work Employment, Region of Niagara 2001-2011 pg. 31

Exhibit 8: Forecast Comparison – Total Population Niagara Region pg. 36

Exhibit 9: Forecast Comparison – Total Employment Niagara Region pg. 36

Exhibit 10: 2011 Forecast Vs 2011 NHS, Niagara Region pg. 37

Exhibit 11: Changes to 2011 Regional Land Supply pg. 42

Exhibit 12: Intensification 2006-2013 pg.47

Exhibit 13: Intensification 2014 pg. 48

Exhibit 14: Share of Regional Land Supply 2015 pg. 52

Exhibit 15: Share of Regional Housing Completions 2006-2015 pg. 52

Map 1: Niagara Region within the context of the Greater Golden Horseshoe pg. 1

Map 2: Lower-Tier Municipal Boundaries in Niagara Region pg. 2

Map 3: Gateway Economic Centre and Zone in Niagara Region pg. 11

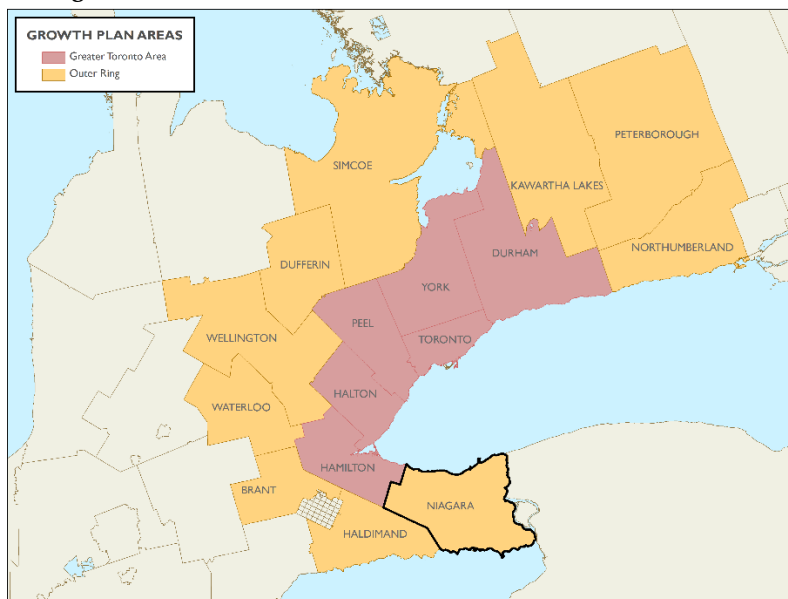
Map 4: The Greenbelt, the Niagara Escarpment Lands, and Niagara Region pg. 11

I Introduction

The Niagara Region lies within the Outer Ring of the Greater Golden Horseshoe (GGH) planning area of Southern Ontario, to the south of the Greater Toronto Area and Hamilton (GTAH). Home to a total population of 450,000 in 2015, the Region is large and diverse covering over 1,850 km² defined by unique physical features and pattern of cities, towns and hamlets in 12 local municipalities and 27 distinct settlement areas.

The *Regional Official Plan* is the key to managing growth and change across the Region. More specific direction governing growth and change is found in the official plans for the Region's 12 local partner municipalities. In October 2013, Niagara Region launched a review of the *Regional Official Plan* with a broad based public engagement exercise. *Imagine Niagara* opened a dialogue with the public about priorities, opportunities and challenges, and helped to shape the work program of the Official Plan Review. Part of that work program is to undertake a Municipal Comprehensive Review (MCR), to critically examine growth potential and local priorities for growth and development over the long term, and to plan for where, and how, that growth will be accommodated.

Map 1: Niagara Region within the context of the Greater Golden Horseshoe



A Municipal Comprehensive Review is an official plan review initiated by the municipality which comprehensively applies the policies and schedules of the *Growth Plan for the Greater Golden Horseshoe, 2006* (the “*Growth Plan*”). The MCR will inform and align with a range of Regional initiatives for managing growth, currently underway or forthcoming, including: a Master Servicing Plan for water and wastewater, a Transportation Master Plan, a Transit Hubs and Stations Study and Development Charges Background Study.

The first comprehensive review of growth management policies for Niagara, Niagara 2031, was carried out in accordance with provincial policy contained within the *Growth Plan* and resulted in Amendment 2-2009 to the *Regional Official Plan*. This project will learn from that work and will build on the Sustainable Urban Vision and Common Objectives of the *Regional Official Plan* as well as many of the policy and implementation initiatives that have been undertaken since the adoption of Amendment 2-2009.

Map 2: Lower-Tier Municipal Boundaries in Niagara Region



A.Managing Growth and Change

The *Planning Act* requires municipalities to review their official plans every five years. Such a review is intended to ensure that broad policy guidance on growth management matters remains current with provincial policy direction including updates to forecasts for growth in population and employment as laid out for upper- and single-tier municipalities in Schedule 3 of the *Growth Plan*.

As some elements of the Region's planning policy have not been reviewed for many years this is an appropriate time for a review of the official plan. Additionally, Amendment 2 to the Province's *Growth Plan* which came into effect on June 17, 2013, updated the Schedule 3 population and employment forecasts to 2031 and extended them to a 2041 horizon. The Region must use these forecasts, shown in Table 1, as a basis for planning.

Through the MCR and subsequent update to the *Regional Official Plan*, the Region will update its population, housing and employment forecasts in the *Regional Official Plan* to 2036 and 2041 planning horizons, consistent with the updated Schedule 3. This will include revisiting and updating the allocations of growth and intensification targets to local municipalities within Niagara.

Population & Employment Forecast (<i>Growth Plan</i> Schedule 3)							Table 1
Niagara Region, 2031, 2036 & 2041							
Original Forecast		Updated Forecast					
Population	Employment	Population			Employment		
2031 A	2031 A	2031 B	2036	2041	2031 B	2036	2041
511,000	218,000	543,000	577,000	610,000	235,000	248,000	265,000

Source: *Growth Plan for the Greater Golden Horseshoe*

At its core, the MCR is a technical exercise, which as part of the *Official Plan* review, attempts to answer the following questions, given the growth forecasts for Niagara Region in the *Growth Plan*:

- Is there sufficient land designated for intensification and new greenfield development to accommodate the growth?
- Where should this growth be accommodated across the Region?

- How should this growth be accommodated across Niagara to meet the strategic objectives of Regional Council?

This exercise, which will run concurrent with other elements of *Niagara 2041*, will encompass:

- Analysis of recent trends – Where, how and why has the Region been growing? What are the current and emerging growth pressures?
- Assessment of land supply – How much growth can be accommodated on designated greenfields and how much potential is there for intensification?
- Forecast of growth – Given market trends, land capacity and planning policy, how much growth should be assigned to each local municipality?
- Urban boundary adjustments – Do the designated urban boundaries need to be expanded, or reduced, to reflect expectations for growth in various housing types and forms of employment?

B. Report Contents

This report summarizes the first two phases of the MCR, outlining current conditions across Niagara, highlighting recent growth trends and describing the policy context within which the MCR is being conducted. It also provides the results of a review of the updated Regional land supply inventory, intensification analysis and an assessment of the capacity of the designated supply to accommodate growth. Key issues and opportunities that the Region may face in planning for growth going forward are identified. As such, it contains important base information which should provide a resource for public and other key stakeholders as they provide important input throughout the project.

Section II outlines the policy context within which the MCR exercise is being undertaken;

Section III provides an overview of recent growth and economic and demographic trends affecting the pattern of growth and development across the Region;

Section IV provides the results of the updated Regional land supply inventory and capacity analysis;

Section VI discusses challenges and opportunities in planning for and managing future growth and development in the Region; and

Section VII presents concluding remarks and study next steps.

II Public Initiatives Influencing Growth and Change

The Niagara Region and its local area municipalities manage growth and change within an overarching planning policy framework that guides where and how development should occur. The Province provides direction through the *Growth Plan* and the Provincial Policy Statement which are implemented through the *Regional Official Plan* (ROP), local municipal official plans and a range of other supporting initiatives. Infrastructure investment decisions are intended to support this framework for managing growth and change, working towards healthy and sustainable growth over the long- term.

In February 2015, the Ministry of Municipal Affairs and Housing (MMAH) initiated a coordinated review of the *Growth Plan*, the *Greenbelt Plan* and the *Niagara Escarpment Plan*. Niagara Region staff consulted with the twelve area municipalities and collaborated on a two-stage submission. Part one included commentary on policy issues while a subsequent submission followed up with a discussion of mapping issues. Regional Council has also adopted strategic directions for this Council term called *Looking Out to Focus In: Fostering an Environment for Economic Prosperity (Looking Out to Focus In)*, and lays out a program of action to realize the following strategic priorities:

- Moving People and Goods;
- Investment, Innovation and Entrepreneurship;
- Build a Labour Ready Workforce;
- Position Niagara Globally; and
- Do Business Differently / Organizational Excellence.

The stated goals of the Coordinated Provincial Plan Review intersect with Regional priorities in the areas of:

- Moving People and Goods;
- Jobs / Attract Talent;
- Innovation; and
- Alignment.

The MCR is primarily focused on the interplay of the current policy framework of the *Growth Plan* as it pertains to the *Regional Official Plan*, and potential amendments to the ROP. Given the timing of the MCR and potential changes to the Provincial Co-ordinated Plan Review, recommendations arising from this MCR will be cognizant of the current provincial policy framework. Other studies that are part of the broader *Official Plan* Review as well as implementation studies and plans, such as the study of Transit Hubs and Stations (Niagara GO Hub and Transit Station Study, or HTSS), will also reflect the strategic directions endorsed by Regional Council.

A. How Do Public Agencies Influence Growth and Change?

Public agencies primarily influence growth and change through two types of initiatives:

- Policy and regulation; and
- Development of new or improved infrastructure (e.g. roads, water and waste water services, hospitals, universities).

In Niagara, the Province, the Region and the local municipalities all have roles in influencing growth and change. The Province in particular has put in place a policy-led planning system which focuses on growth management and with which the Region and local municipalities must conform. In addition, the Province is responsible for major new infrastructure which will have substantial impact on the future of the Region, although the Region, through the construction and improvement of water and waste water services and Regional roads, will also be a significant contributor to growth and change.

B. What Are the Key Provincial Policy Initiatives?

The Region as a whole is subject to both:

- *Places to Grow: Growth Plan for the Greater Golden Horseshoe (Growth Plan)*; and

- *Provincial Policy Statement, 2014 (PPS)*.

In addition, lands in and adjacent to the Niagara Escarpment are subject to the *Greenbelt Plan* and the *Niagara Escarpment Plan* as shown on the map on the following page. Any decisions by the Region and local municipalities must conform to these Provincial plans and be consistent with the *PPS*.

The *Growth Plan*, originally adopted in 2006, has been amended twice. Amendment 2 updated the Schedule 3 population and employment forecasts and extended them to a 2041 planning horizon. The *Growth Plan* is specifically focused on “building stronger, prosperous communities by better managing growth in the region” (Section 1.1 page 6) and seeks to achieve this goal by giving specific policy direction to regional and single-tier municipalities in the following areas.

1. Intensification

Priority is placed on intensification in already built-up areas of settlement areas. Beginning in 2015, a minimum of 40% of all residential development occurring annually within Niagara must be located within the built-up area (Section 2.2.3.1). In addition, downtown St. Catharines, which is identified as an “urban growth centre”, must be planned to achieve a density of at least 150 residents and jobs combined per hectare by 2031 (Section 2.2.4.5). Major transit station areas and intensification corridors are also to be designated in official plans and planned to achieve increased densities to support transit and mixed use development. Finally, all municipalities are required to develop and implement, through their official plans and supporting documents, a strategy and policies to phase in and achieve intensification to meet the intensification target (Section 2.2.3.6).

2. Strict Limits on Settlement Boundary Expansion

Settlement area boundary expansions are strictly limited through the imposition of restrictive criteria for such changes. In particular, such expansion may only occur through a Municipal Comprehensive Review (Section 2.2.8.2).

3. Increased Density for Greenfield Areas

New development in any undeveloped areas within settlements (Designated Greenfield Areas) is to be compact and transit-supportive (Section 2.2.2.1c). Such development must achieve a minimum density target of not less than 50 residents and jobs combined per hectare measured over the entire greenfield area of the Region (Sections 2.2.7.2 and 2.2.7.3). In addition, greenfield development has to be planned

to create complete communities that support transit and active transportation, as well as a mixed use development with high quality public open spaces (Section 2.2.7.1).

4. Preservation of Employment Areas

The preservation of employment areas for future economic opportunities is required through the imposition of restrictive criteria for the conversion of land to non-employment uses. In addition, any conversion may occur only through a municipal comprehensive review (Section 2.2.6.5).

5. Recognition of a Gateway Economic Zone and Gateway Economic Centre within Niagara

The *Growth Plan* recognized a Gateway Economic Zone and Gateway Economic Centre within Niagara. In June 2007, the Province announced funding for the development of an action plan for these areas (See Map 3).

6. Infrastructure Investments Support the Growth Plan

“Infrastructure planning, land use planning and infrastructure investment will be co-ordinated to implement” the *Growth Plan* (Section 3.2.1.1). Infrastructure includes transportation, transit, pedestrian and bicycle networks, movement of goods, water and wastewater systems and community infrastructure.

7. Natural Systems, Prime Agricultural Areas and Mineral Aggregate Resources Are Protected

Natural systems, prime agricultural areas and mineral aggregate resources are to continue to be protected and managed as part of planning for future growth (Section 4.1). In particular, all policies in the *Greenbelt Plan* will continue to apply.

8. A Culture of Conservation

Municipalities are to develop and implement official plan policies and other strategies that are designed to meet conservation objectives related to water, energy, air quality and integrated waste management (Section 4.2.4).

The *PPS* reflects the same key general directions as the *Growth Plan* – in particular:

- the prioritization of intensification;
- limits on boundary expansion;
- increased density in greenfield areas;

- preservation of employment areas, and
- protection of natural systems, prime agricultural areas and mineral aggregate resources.

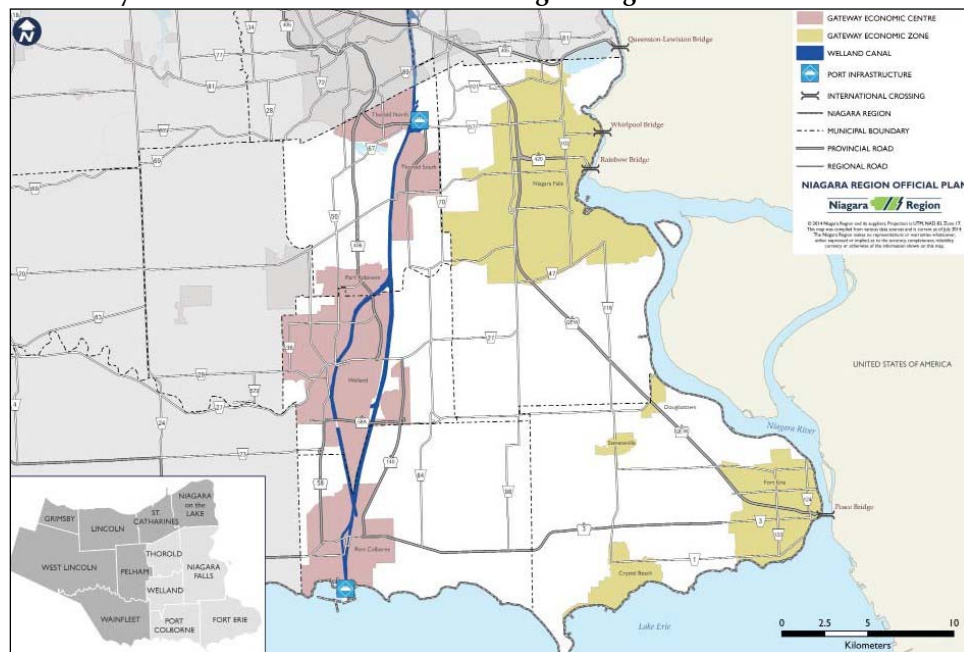
However, the policies of the *PPS* do provide some additional requirements which must be considered in evaluating development. These range from additional criteria when considering settlement boundary expansion (e.g. compliance with minimum distance separation formulae) to more detailed policies related to matters such as housing, natural systems, agriculture and mineral aggregate resources, as well as policies related to cultural heritage and archaeology and natural and human-made hazards.

The *Greenbelt Plan* and the *Niagara Escarpment Plan (NEP)* primarily provide direction to areas outside of settlement boundaries. The *Greenbelt Plan* applies to significant agricultural areas north and south of the Escarpment. However, with respect to settlement areas, Section 3.4 indicates that Towns / Villages and Hamlets continue to be governed by municipal official plans and are not subject to the policies of the *Greenbelt Plan* save for the external connections policy of Section 3.2.5. This section relates to river valleys in urban areas and criteria for evaluation of development in or adjacent to such valleys.

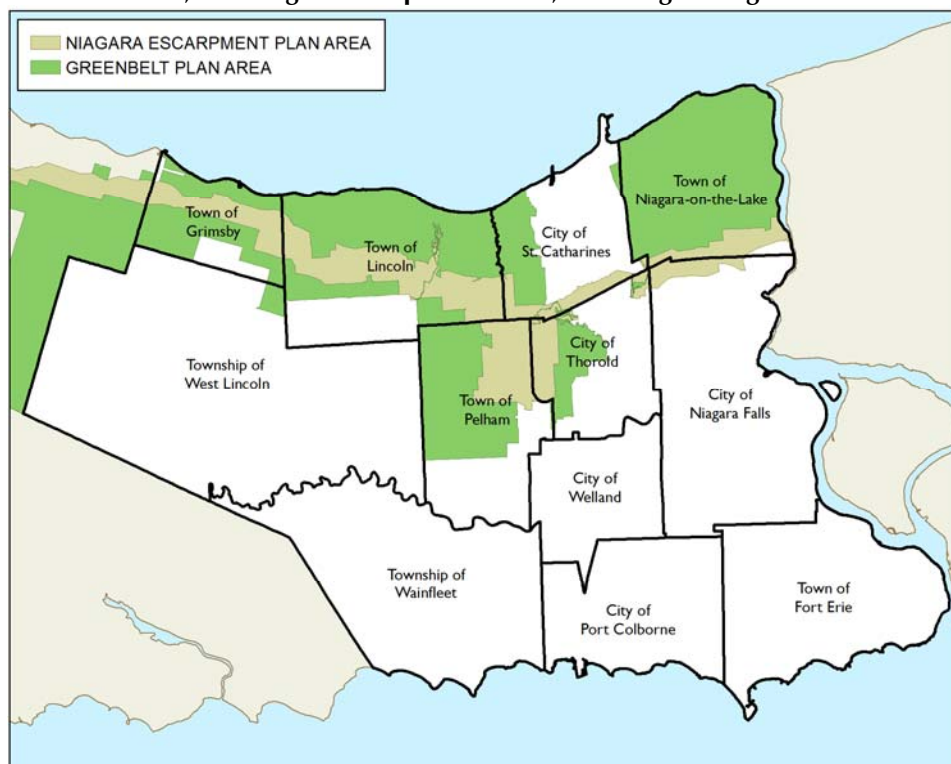
The *NEP* includes an Urban Area designation which is applicable in Niagara Region to areas of the Town of Grimsby, Town of Lincoln and City of St. Catharines. The Urban Area designation is designed “to minimize the impact and further encroachment of urban growth on the Escarpment environment” (Section 1.7). Development is permitted subject to conformity with Part 2 of the *NEP*, Development Criteria and specific Development Objectives.

The *NEP* also includes a Minor Urban Centre designation which is applicable to St. David’s and Queenston in the Town of Niagara-on-the-Lake. The Minor Urban Centre designation is designed “to recognize, maintain and enhance existing rural settlements” (Section 1.6). The policies are designed to ensure any development is compatible with the existing character and the Escarpment.

Map 3: Gateway Economic Centre and Zone in Niagara Region



Map 4 The Greenbelt, the Niagara Escarpment Lands, and Niagara Region



C. What Initiatives Has the Region Undertaken with Respect to Growth Management?

1. Official Plan Policy

Niagara 2031 was the last Municipal Comprehensive Review undertaken by the Region and resulted in a growth management strategy to guide growth to 2031. To implement Niagara 2031, Regional Council adopted *Regional Official Plan* Amendment 2-2009 (RPPA 2-2009) Sustainable Community Policies on May 28, 2009 to bring the official plan into conformity with the *Growth Plan*. Following appeals and the adoption of a phasing policy as required by MMAH (RPPA 8-2013), the *Regional Official Plan* was approved by MMAH and is in full force and effect.

The *Regional Official Plan* currently provides population and employment forecasts for Niagara to 2031 based on the original *Growth Plan* forecast for total population of 511,000 and for total employment of 218,000 at a 2031 horizon. The official plan also allocated this forecast growth among Niagara's twelve area municipalities.

To realize this magnitude and distribution of growth, Chapter 4 of the *Regional Official Plan* establishes settlement area boundaries in Schedule A, along with a minimum density target of 50 people and jobs per gross hectare to be achieved as Designated Greenfield Areas develop.

Additionally, Policy 4.C.4.2 assigns specific intensification targets to each area municipality in order to realize the 40% minimum intensification rate that the Region is to achieve starting in 2015, and for each year thereafter.

Chapter 4 also has policies to support the development of the designated Urban Growth Centre in downtown St. Catharines with a density target for 2031 of 150 people and jobs per hectare.

Other key policies introduced to bring the *Regional Official Plan* into conformity with the *Growth Plan* include:

- Strict limits on settlement area boundary expansions;
- Protection of employment lands from conversion;
- Recognition of a Gateway Economic Zone and Gateway Economic Centre; and
- A framework and policy for co-ordinating land use planning with infrastructure planning and investment.

More detail on specific Regional Official Plan policies designed to achieve these objectives and targets are summarized in Appendix A.

2. Implementation Initiatives

It is clear that the *Regional Official Plan* represents a well-developed approach to growth management. In addition, the Region has undertaken a number of initiatives designed to realize the policy objectives and align important public investment with development. Key implementation projects include:

Nodes and Corridors Study

This study, an implementation measure of RPPA 2-2009, identified priority areas for urban development and intensification that will be a focus for near term and long-term growth and transportation investment to the 2031 planning horizon.

Niagara Gateway Economic Zone and Centre Community Improvement Plan

RPPA 1-2012, the “Gateway Amendment” established a vision to attract investment and promote employment growth in strategic locations by providing tax-increment grant incentives for investment. A recent award of funds helped to establish a new food processing plant in Welland.

Phase II Niagara Employment Lands Study

This study examined the potential for incentives for the intensification of employment lands outside of the Gateway communities, including the St. Catharines Urban Growth Centre which is to be the focus of major office employment in the Region. This is currently being implemented through ROPA 9.

Development Phasing

The Phasing Strategy, RPPA 8-2013, was brought in to ensure logical, orderly and timely development and align land use planning with infrastructure investment. Area municipalities will implement the directions provided by this policy when they next review their official plans.

Smarter Niagara

The Smarter Niagara Incentive Program provides incentives to local municipalities to promote downtown and brownfield redevelopment, residential intensification, affordable housing, façade and building improvements, heritage restoration and preservation, agricultural revitalization and conversion and support of planning and public realm improvements through the adoption of local area community improvement plans. Since 2003, 11 out of 12 local municipalities have adopted a total of 25 Community Improvement Plans (CIPs) with consideration and preparation of several more currently underway.

3. Infrastructure Initiatives

Aligning infrastructure investment with growth management policy is the responsibility of the Province, the Region and the local municipalities. Key infrastructure studies underway which will help to shape Niagara's future include:

Transportation

The December 2012 Update to the Region's Transportation Strategy links land use and transportation planning and identifies key actions for transportation system improvements in the Region. The Region's first Transportation Master Plan has been launched to plan for a full range of transportation improvements to accommodate growth to 2041. This project is running concurrently with the MCR.

Water and Wastewater

The Region's 2009 update to the Water and Wastewater Master Servicing Plan (WWMSP) was completed in 2011. It addressed the servicing needs to 2031. The servicing needs that may arise as Niagara plans for growth to 2041 will be assessed through the WWMSP running concurrently with the MCR.

GO Stations/Transit Hubs and Stations

The Region is working with local municipalities on a Transportation Master Plan and Transit Hubs and Stations Strategy that will "strategically focus Regional transportation investments and provincial/federal funding to community hubs." Locations will be designated and protected in the Regional Official Plan. Without an extension of GO Rail service there may still be some realized potential at some locations through GO Bus terminals, however, GO Rail extension will be a catalyst to realizing many planning objectives at the Regional and local level (Niagara Region, "Looking Out to Focus In", page 55).

Transportation Improvements: Niagara to GTA Corridor

The Ontario Ministry of Transportation (MTO) completed Phase 1 of the *Niagara to Greater Toronto Area (NGTA) Corridor Environmental Assessment* in September 2013. As outlined in the *NGTA Transportation Development Strategy* (2013), the Province has recommended the development of a new transportation corridor (NGTA East Area Corridor) between Highway 140 in Welland/Port Colborne and the Queen Elizabeth Way in Fort Erie. This planned corridor is intended to improve access between the Niagara Economic Gateway and the international border crossing at Fort Erie, and to alleviate forecasted capacity issues on existing corridors in Niagara. The Province has also recommended the future widening of the QEW to eight lanes from Stoney Creek to St. Catharines to address traffic volume projections to 2031.

Phase 2 of the *NGTA Corridor Environmental Assessment* will determine the preferred route for the NGTA East Area Corridor, and subsequently may recommend capacity improvements to Highway 140. Phase 2 is not yet scheduled. As indicated in the Regional Strategic Plan, the Region is working in cooperation with Hamilton, Halton, Peel and Waterloo to advocate for the development of the NGTA Corridor.

Other improvements include the twinning of Highway 406 which is nearly complete. The Region is also working with local municipalities and the Province to carry out the necessary due diligence to expand GO rail service to Niagara (Niagara Region, “Looking Out to Focus In”, page 55).

Health Infrastructure

The Niagara Health System is studying a new hospital in Niagara Falls at Montrose and Lyon’s Creek Roads. Planning for the South Hospital and two Urgent Care Centres was initiated in 2014.

Education Infrastructure

The District School Board of Niagara has announced the construction of a new Greater Fort Erie Secondary School with funding approved by the Province. This school will result from the merging of the Ridgeway-Crystal Beach High School and the Fort Erie Secondary School. The sites of the former high schools will have the potential to be redeveloped.

Inter-Municipal Transit

The Region approved proceeding with a Regional Inter-Municipal Transit Pilot Project on June 23, 2010. A pilot project providing a triangular connector service between Niagara Falls, St. Catharines and Welland with augmented connector services to Fort Erie and Port Colborne has evolved into a permanent service.

D. What Initiatives Have the Local Municipalities Undertaken with Respect to Growth Management?

The local municipalities are generally well advanced with respect to the implementation of growth management initiatives. Almost all of the local municipalities have updated and approved official plans which conform to Provincial policy and the *Regional Official Plan* growth management directions. Appendix B provides more detail on the approach in the local plans.

The local municipalities have also undertaken a range of other implementation initiatives or are advancing significant development projects which implement the Provincial and Regional growth management directions. These are also included in Appendix B. They include the preparation of a range of detailed planning implementation tools including:

- urban boundary amendments;
- secondary plans;
- master plans;
- zoning by-laws;
- community improvement plans; and
- environmental assessments.

Some of the major development and redevelopment projects proposed or underway include:

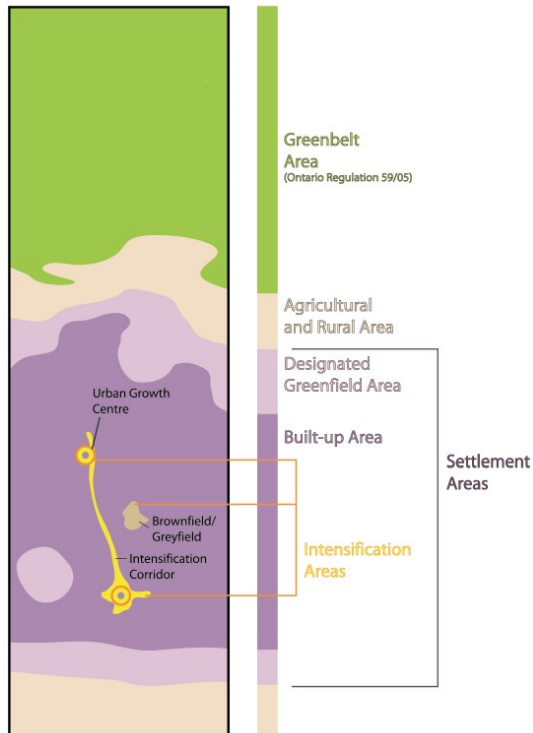
- downtown redevelopment projects;
- GO Station/Mobility Hub studies will help shape intensification in Grimsby, Lincoln, St. Catharines and Niagara Falls; and,
- Potentially transformative developments such as Prudhommes Landing, a marina, a racetrack, and an energy park.

E. Provincial Policy Guides How Niagara Will Need to Accommodate Growth

The MCR presents an opportunity to take stock of how the Region is growing and make adjustments to growth management policy to ensure that the objectives of Provincial and Regional policy are being met. Exhibit 1 illustrates how, for any municipality, the Built Up Area and Designated Greenfield Area combine to make up Settlement Areas. In Niagara, most local area municipalities have more than one Settlement Area. A primary purpose of the MCR is to ensure that Niagara has an adequate land supply to accommodate forecast growth on Designated Greenfield Areas (DGAs) and through intensification within Built Up Areas across the Region.

While the responsibility for land use control resides with the area municipalities, they are guided in assessing the sufficiency of land supply by the *Regional Official Plan*. The Region must ensure there is enough land available to accommodate the forecast for population and employment growth found in Schedule 3 of the *Growth Plan*.

Exhibit 1: *Growth Plan* Land Use Terminology



Source: Places to Grow, Appendix 2

The forecasts and local allocations contained within the *Regional Official Plan* will be updated to reflect Amendment 2 to the *Growth Plan* as illustrated in Schedule 3 2031 B:

- higher Regional forecasts to 2031;
- a twenty year planning horizon to 2036 which will be used as a basis for determining land need associated with housing growth; and
- a longer-term vision of the Region to the *Growth Plan* 2041 horizon.

The MCR may recommend changes to the designated land supply including:

- Some lands in the countryside may be designated for new urban development over the long term, becoming “Designated Greenfield Areas”;
- Some “Designated Greenfield Areas” that are not needed to meet demand within the context of updated growth allocations, could be removed from settlement areas for the planning horizon or phased out for development post-2041; and
- Some lands designated exclusively for employment purposes might be re-designated for residential or mixed use development if a need is established consistent with Provincial policy.

The Region, through this MCR exercise, will update and allocate the Region-wide growth forecasts to 2031, 2036 and 2041 for each local municipality to implement the preferred option that will be identified in Phase Four of this study. The allocations will incorporate assessments of the adequacy of Designated Greenfield Area lands as well as intensification potential in each municipality. The first step in this effort is to update the Regional land budget as input to assessing the overall adequacy of the land supply Region-wide and within each local municipality. The Regional land supply inventory has been updated in an iterative process incorporating input from Regional and area municipal planning staff.

III Recent Trends Reinforce Pattern of Growth Across the Region

Understanding where, how and why growth has (or has not) been occurring across the Region is a key input to the MCR process. Growth has fluctuated over the last two decades, influenced more recently by recession, a changing economic base and an aging demographic trend. Within the Region, recent growth in population and housing has been increasingly influenced by the GTAH economic region.

This section looks at longer term growth in population, housing and employment Region-wide, and recent changes within each of Niagara's twelve local area municipalities. Consideration is given to demographic and economic trends affecting the pace and distribution of growth and development in the Region.

A. Slowing Growth Trend Unevenly Experienced Among Niagara Municipalities

Niagara has been experiencing slow population growth in recent years relative to its longer-term pattern and a period of markedly high growth in the early 2000's. Table 2 indicates the Region's Census and total population including Census Net Undercoverage from 1991 to a 2016 estimate.

Population Growth Niagara Region				
Year	Census Population	Growth	Compound Annual Growth Rate	Total Population**
1991	393,900	--	--	407,100
1996	403,500	9,600	0.5%	411,100
2001	410,600	7,100	0.3%	424,800
2006	427,400	16,800	0.8%	442,200
2011	431,300	3,900	0.2%	442,800
2015	437,500	6,200	0.3%	449,100
2016 est.*	439,200	7,900	0.5%	450,800

*Estimates are based on Statistics Canada, Annual Demographic Estimates (91-214-X)

**Includes Census Net Undercoverage

Figures are rounded

The Region grew steadily by nearly 17,000 residents throughout the 1990's then added another 17,000 residents in the five years between 2001 and 2006. This was followed by a relatively modest growth of 3,900 in Census population, Region-wide from 2006 to 2011. More recent estimates from Statistics Canada indicate that the Region is back on a somewhat upward growth trend. Niagara had a 2015 population of 437,500 (449,100 including Census Net Under-coverage). If the Region continues along its more recent pattern of growth, Niagara could potentially reach a Census population of approximately 439,200 residents, or 450,800 total population including Undercoverage, when the Census is conducted in 2016.

The slower rate of population growth experienced in the latter part of the 2001 to 2011 Census decade relative to the Region's longer-term historic pattern reflects a number of factors such as the recent recession and an aging population. However, this slowing trend was not experienced evenly among Niagara's local municipalities, as illustrated by Table 3, which indicates the change in Census population by local municipality from 2001 to 2011.

Table 3

Census Population by Local Municipality Niagara Region, 2001 - 2011									
Municipality	Census Population			Growth		Compound Annual Growth Rate		Share of Regional Growth	
	2001	2006	2011	2001-06	2006-11	2001-06	2006-11	2001-06	2006-11
Fort Erie	28,100	29,900	30,000	1,800	100	1.3%	0.1%	11%	3%
Grimsby	21,300	23,900	25,300	2,600	1,400	2.4%	1.2%	15%	36%
Lincoln	20,600	21,700	22,500	1,100	800	1.1%	0.7%	7%	21%
Niagara Falls	78,800	82,200	83,000	3,400	800	0.9%	0.2%	20%	21%
Niagara-on-the-Lake	13,800	14,600	15,400	800	800	1.2%	1.1%	5%	21%
Pelham	15,300	16,200	16,600	900	400	1.2%	0.5%	5%	10%
Port Colborne	18,500	18,600	18,400	100	(200)	0.1%	-0.2%	1%	-5%
St. Catharines	129,200	132,000	131,400	2,800	(600)	0.4%	-0.1%	17%	-15%
Thorold	18,000	18,200	17,900	200	(300)	0.2%	-0.3%	1%	-8%
Wainfleet	6,300	6,600	6,400	300	(200)	1.0%	-0.6%	2%	-5%
Welland	48,400	50,300	50,600	1,900	300	0.8%	0.1%	11%	8%
West Lincoln	12,300	13,200	13,800	900	600	1.5%	0.9%	5%	15%
Niagara Region	410,600	427,400	431,300	16,800	3,900	0.8%	0.2%	100%	100%

Source: Statistics Canada Census and National Household Survey.

Figures are rounded

Port Colborne, St. Catharines, Thorold and Wainfleet experienced population decline between 2006 and 2011, while others continued to add population over both Census periods, although at much slower rates for most between 2006 and 2011, relative to the growth which occurred in the earlier part of the decade.

The growth in population that did occur across Niagara in the more recent Census period reinforces a notion that the pattern of growth and development in the Region is in large part influenced by proximity to the GTAH. The most westerly

municipalities of Grimsby, Lincoln and West Lincoln each significantly increased their shares of Region-wide population growth in the latter Census period.

Population growth also slowed in Niagara Falls however the municipality consistently maintained a 20% share of the population growth that occurred Region-wide over the past decade, highlighting its importance as a population centre within the Region. The municipalities of Fort Erie, Pelham and Welland also continued to add population though at more modest rates in the more recent Census period.

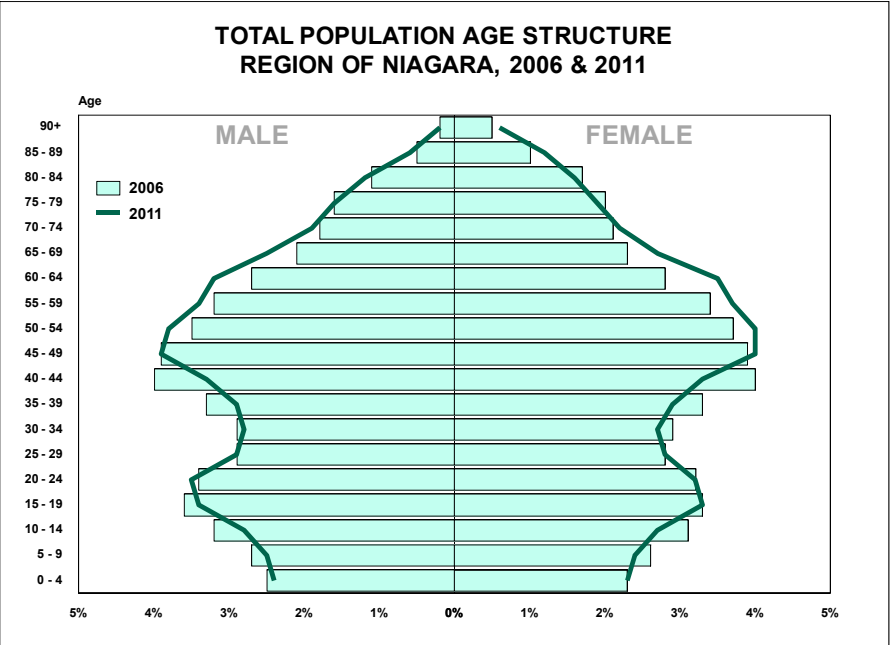
The Town of Niagara-on-the-Lake grew by 800 residents in each of the past two Census periods – an indicator of the unique lifestyle amenity characteristics of this municipality. However, this represented a much more significant share of the Region’s overall population growth in the 2006 to 2011 period within the context of a slowing growth trend; the same level of absolute unit growth represented a 21% share of Regional growth in 2006 to 2011 period, as compared to 5% between 2001 and 2006.

B. Demographic Trends Influence Growth and Change in the Region

The Region’s growth patterns are influenced by key demographic trends that are affecting many communities in Ontario. The population of Niagara Region is aging, a characteristic that will have important implications on planning for growth and development across the Region. In 2011, Canada reached its highest proportion of senior residents ever, with 15% of the population over age 65; similarly, 15% of Ontario’s population is now over age 65 and 27% over age 55. In Niagara, the senior population grew from 16.8% in 2006 to 18.4% in 2011, while 32.2% of the population is currently 55 years of age or older.

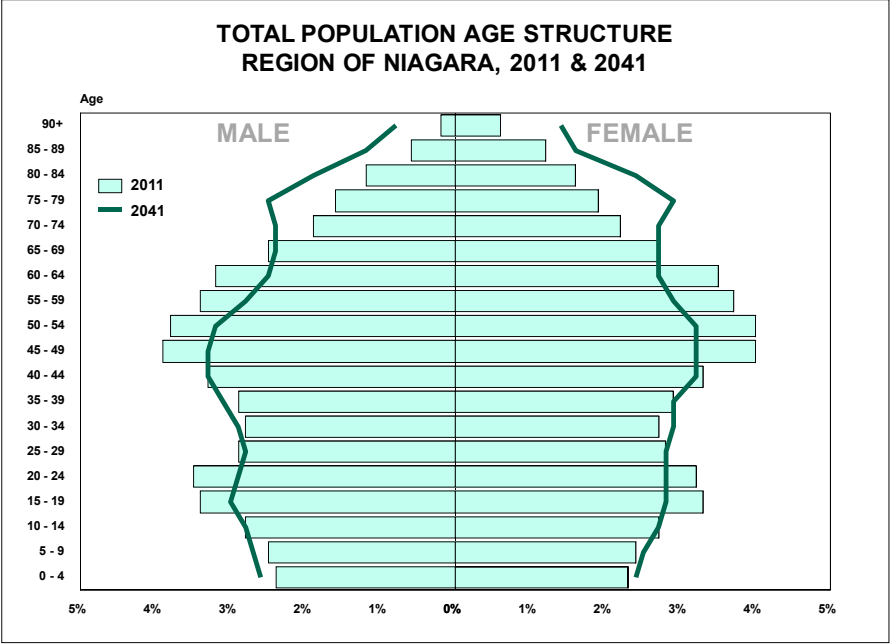
As shown in Exhibit 2, the Region’s population is also aging, a trend that is anticipated to continue – an outcome of both the aging of the baby boom generation as well as the out-migration of younger adults. Exhibit 3 illustrates how the Region’s population is anticipated to continue aging to the 2041 horizon. Seniors are projected to represent 25% of the population by 2041.

Exhibit 2



Source: Hemson Consulting Ltd. based on Statistics Canada data

Exhibit 3

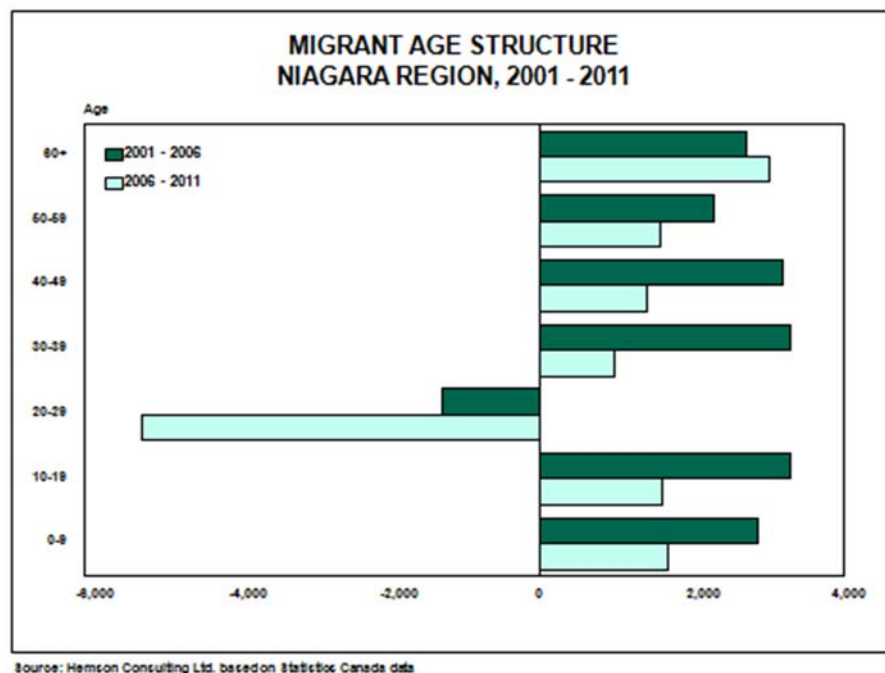


Source: Hemson Consulting Ltd. based on Statistics Canada data

While the Region's ongoing economic development initiatives and municipal investments will be key to attracting working age population and retaining young adults, planning for an aging population will also be an important consideration for the Region and its local municipalities going forward.

Exhibit 4 illustrates a significant change in the pattern of migration in and out of the Region by different age groups. This graph highlights an important pattern occurring over the last two Census periods, characterized by a marked increase in the level of out-migration by young adults coupled with much lower levels of in-migration of 30 to 40 year olds, and hence, reduced levels of in-migration of children. While, as with many municipalities across Ontario, there has always been an out migration of young people to seek education and employment opportunities elsewhere, the number of people between 20 and 29 years of age who left Niagara from 2006 to 2011 increased four-fold over the previous five-year period. The impact of this is even more significant given the slow rate of population growth overall during this period.

Exhibit 4



Meanwhile, Niagara continues to attract a significant number of adults over the age of 60. The extent to which the economic development efforts of the Region and its local municipal partners can help to attract and retain youth and employment opportunities in the Region will be key in supporting a healthy and sustainable future growth outlook in Niagara. These changes in the Region's demographics are key considerations in planning for growth and change, as they influence development patterns, notably housing demand, as well as regional and local services.

C. Housing Growth Slowed but Continues to Outpace Growth in Population

Population and housing growth both slowed across Niagara during the latter part of the 2001 to 2011 Census decade, however the rate of growth in housing has begun to significantly outpace that of population growth. This is an important outcome of an aging population. Table 4 indicates the growth in occupied households across Niagara over the twenty-year period from 1991 to 2011. The Region has experienced a relatively steady growth trend in households over the past two decades, slowing somewhat over time.

Table 4 Occupied Households Niagara Region, 1991 - 2011			
Year	Households	Growth	Compound Annual Growth Rate
1991	146,400	--	--
1996	154,900	8,500	1.1%
2001	162,400	7,500	1.0%
2006	169,400	7,000	0.8%
2011	174,500	5,100	0.6%

Source: Statistics Canada.

Figures are rounded.

The impact of declining household size becomes evident when comparing growth in population to growth in households. Between 2001 and 2006, the Region added 7,000 households and 17,000 residents; over the five years which followed, much more modest population growth of just under 4,000 residents was coupled with growth of more than 5,000 households. The divergence between population and housing growth

in the Region largely reflects the aging demographic trend occurring in Niagara and many other communities throughout the Province, in particular those outside of the major urban centres. An older population forms more households because they have fewer children and are more likely to be divorced or widowed (where women still typically live longer than their male spouses). The result is a greater proportion of “empty- nester” households and of single-person households.

The decline in average household size associated with an aging population means that housing growth out-paces growth in population. The result is that fewer residents are housed within the Region’s existing housing base; and that growth in new units will tend to accommodate proportionally less population overall going forward. Table 5 indicates the change in persons per unit in Niagara Region from 2001 to 2011.

Table 5 Persons Per Unit Niagara Region, 2001 - 2011	
Year	PPU
2001	2.48
2006	2.47
2011	2.42

Source: Statistics Canada.

The change in occupied households observed in the Census is a net difference in occupied units. The largest contributor to this net change is new housing production. As with population, more recently, housing growth has picked up in Niagara. Table 6 below combines recent completions with estimates of completion from building permits recently issued to take a look at the current pattern of housing growth. The Region has already added almost 5,000 new units since the 2011 Census which equates to the growth experienced from 2006 to 2011 as seen in Table 4. With a potential of adding over 8,000 units by mid-2016, the Region could be on track to have over 182,000 occupied households at the 2016 Census if more recent rates of growth continue. However, it does seem as if the pattern of housing growth outpacing population growth is continuing.

Table 6 CMHC Housing Completions Niagara Region, Census Day 2011 to Census Day 2016					
Year	Single	Semi	Row	Apartment	Total
2011 (June-Dec)	487	22	146	2	657
2012	696	62	465	212	1,435
2013	762	70	246	138	1,216
2014	889	104	534	120	1,647
2015 est	1,020	440	570	180	2,210
2016 (Jan-May) est	410	180	230	50	870
Total	4,264	878	2,191	702	8,035
Share by Type	53%	11%	27%	9%	100%

Source: Canadian Mortgage and Housing Corporation.

This aging demographic trend is evident across the Region, as every local municipality within Niagara experienced a widening gap between the rates of housing and population growth since 2001. As shown in Table 7 below, despite losing population from 2006 to 2011, St. Catharines and Thorold continued to experience modest housing growth.

As one would expect for the period 2006 - 2011, household growth was lower across the Region, and as with population, this growth was unevenly distributed among Niagara's local municipalities.

Table 7 Occupied Households by Local Municipality Niagara Region, 2001 - 2011									
Municipality	Occupied Households			Growth		Average Annual Growth Rate		Share of Regional Growth	
	2001	2006	2011	2001-06	2006-11	2001-06	2006-11	2001-06	2006-11
Fort Erie	11,400	12,200	12,500	800	300	1.4%	0.5%	11%	6%
Grimsby	7,600	8,700	9,600	1,100	900	2.9%	2.1%	16%	18%
Lincoln	7,100	7,600	8,100	500	500	1.4%	1.3%	7%	10%
Niagara Falls	31,500	32,500	33,400	1,000	900	0.6%	0.6%	14%	18%
Niagara-on-the-Lake	5,000	5,500	5,900	500	400	2.0%	1.5%	7%	8%
Pelham	5,600	5,900	6,200	300	300	1.1%	1.0%	4%	6%
Port Colborne	7,600	7,800	7,900	200	100	0.5%	0.3%	3%	2%
St. Catharines	53,800	54,700	55,400	900	700	0.3%	0.3%	13%	14%
Thorold	6,900	7,100	7,100	200	-	0.6%	0.0%	3%	0%
Wainfleet	2,200	2,400	2,300	200	(100)	1.8%	-0.8%	3%	-2%
Welland	19,800	20,700	21,500	900	800	0.9%	0.8%	13%	16%
West Lincoln	3,900	4,300	4,600	400	300	2.1%	1.4%	6%	6%
Niagara Region	162,400	169,400	174,500	7,000	5,100	0.9%	0.6%	100%	100%

Source: Statistics Canada.

Figures are rounded.

Recent building permit data supports the pattern of housing growth observed in the Census. Table 8 below summarizes residential building permits issued since 2011 by local municipality. The pattern of concentration within a few Niagara municipalities is again reinforced.

Table 8

Residential Building Permits Issued by Local Municipality Niagara Region, 2011 - 2015							
Municipality	2011	2012	2013	2014	2015	2011-15	Share of Region
Fort Erie	82	106	81	79	104	452	5%
Grimsby	230	78	290	252	132	982	11%
Lincoln	130	87	185	117	84	603	7%
Niagara Falls	382	330	391	406	793	2,302	26%
Niagara-on-the-Lake	225	278	242	246	294	1,285	15%
Pelham	47	40	34	62	86	269	3%
Port Colborne	44	22	13	22	36	137	2%
St. Catharines	138	253	321	157	223	1,092	12%
Thorold	75	60	79	181	57	452	5%
Wainfleet	18	13	13	7	25	76	1%
Welland	109	173	133	169	173	757	9%
West Lincoln	74	41	85	62	117	379	4%
Niagara Region	1,554	1,481	1,867	1,760	2,124	8,786	100%

Source: Statistics Canada.

Niagara Falls has issued building permits for over 2,000 new units since 2011, representing 26% of the Region's residential growth in recent years. Grimsby, St. Catharines and Niagara-on-the-Lake also continue to experience relatively significant residential demand, combining for a significant component of the Region's total residential growth.

The municipalities of Wainfleet, Port Colborne, Pelham, West Lincoln, Thorold and Fort Erie have been growing more modestly in terms of new residential building activity in recent years. Taken together, these six communities have accounted for roughly 20% of Region-wide residential building permits since 2011. It is noted however that some of these communities are building on a small housing base, thus the locally felt impacts of this growth are still significant. For example, the 335 new units in West Lincoln account for 4% of Regional growth but represented a 7.2% increase in the Town's housing base whereas 2,064 new units in Niagara Falls, represented a 6.2% increase over that city's existing base.

D. Employment

Employment in the Region has also been variable over recent Census periods, amidst recession and a shifting economy. This section looks at three different profiles of economic activity in the Region:

- Place of Work data which provides the overall number of jobs in the Region at each Census period, an indicator of economic growth or decline;
- Change in employment by North American Industry Classification System (NAICS) which indicates any sectoral shifts in the Regional economy; and
- Information on Resident Employed Labour Force, which tell us the number of working Niagara residents, and indicates changes in the size of the Regional labour pool.

Data on Place of Work employment reports the number of jobs in an area, irrespective of where the employee resides. As shown in Table 9, after a healthy growth of 6.6% from 2001 – 2006, the number of jobs in the Region declined by 4.8% by 2011. Niagara added 12,000 jobs over the 2001 to 2006 Census period, followed by significant decline of 9,300 between 2006 and 2011.

Total Place of Work Employment Niagara Region, 2001 - 2011				Table 9
Year	POW Employment	Growth	Compound Annual Growth Rate	
2001	182,900	--	--	
2006	194,900	12,000	1.3%	
2011	185,600	(9,300)	-1.0%	

Source: Statistics Canada.

Figures are rounded.

The data in this section for 2011 are based on the National Household Survey. The National Household Survey (NHS) is the new voluntary survey which replaced the long-form Census in 2011. The Census has historically provided an important source of labour force and employment information. Comparability issues have been identified between the historic Census data and the NHS. In particular, the NHS appears to have under-reported total employment in some areas relative to other sources, such as the Monthly Labour Force Survey. Within Niagara, 7 out of 12

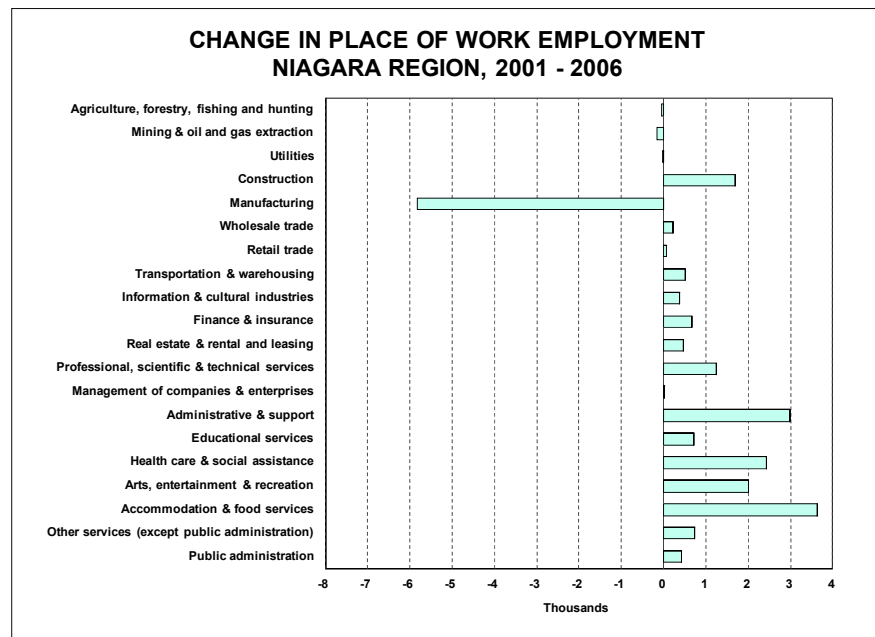
municipalities exhibited a high non-response rate on the NHS. More detail on this can be found in Niagara Region Staff Report: ICP57-2013.

Notwithstanding the concerns with the NHS and its comparability, it remains the only source for economic and employment data gathered across a large sample of households that covers the entire Greater Golden Horseshoe region and its municipalities in a standardized way. As a result, it should still be used as the standard for 2011 base data, while understanding its potential limitations. The Region is planning to initiate a Regional Employment Survey beginning in 2016 which will complement Statistics Canada data and will help to ensure a detailed and accurate understanding of employment in the Region.

Similar to many communities outside of the major urban centres and in southwestern Ontario, a significant decline in manufacturing was coupled with growth in many other sectors, the highest being in public administration and health care & social services. The manufacturing base in southwestern Ontario has not recovered since the recession, although over the longer term, some recovery is anticipated.

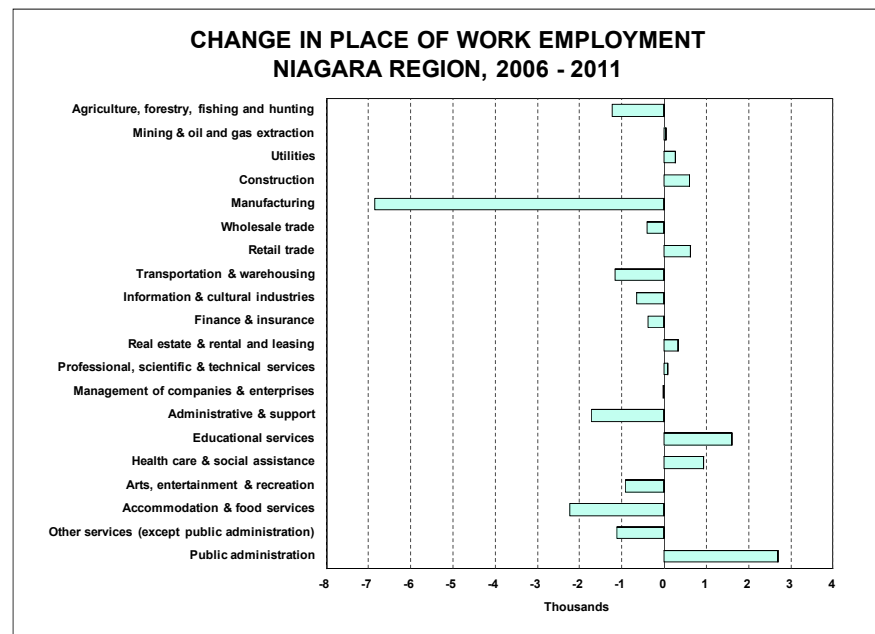
The change in total Place of Work employment between 2001 and 2006 and 2006 and 2011 along with the change in relative shares by sector over the 2001 to 2011 period are shown on in Exhibits 5, 6 and 7. The Regional economy has been adjusting to the loss of manufacturing since 2001, however, the effects of the recession is particularly notable in declines across sectors in 2011.

Exhibit 5



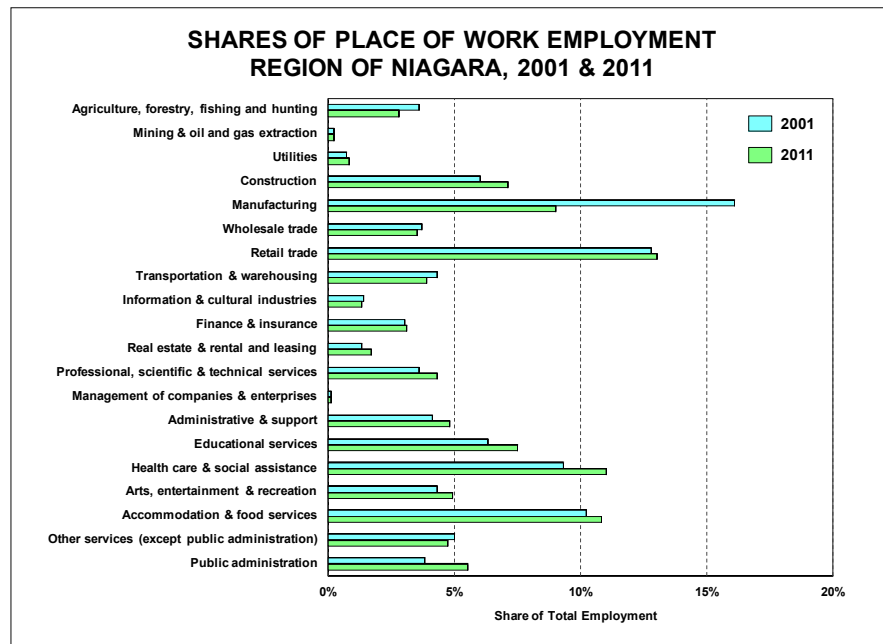
Source: Hemson Consulting Ltd. based on Statistics Canada, 2001 & 2006 Census of Canada.

Exhibit 6



Source: Hemson Consulting Ltd. based on Statistics Canada, 2011 National Household Survey & 2006 Census of Canada.

Exhibit 7



Source: Hemson Consulting Ltd. based on Statistics Canada, 2011 National Household Survey & 2001 Census of Canada.

Manufacturing declined in the Region by almost 13,000 jobs over the 10 years between 2001 and 2011. While in the 2001 to 2006 period, the decline in manufacturing was more than offset by growth in most other sectors, in particular those related to a service-oriented economy, during the latter part of the Census decade the Region experienced decline in many sectors resulting in a net overall loss of employment. Much of the decline in employment which occurred since 2006 is likely due to the recent recession; it is anticipated that most of these sectors will recover over the long-term, manufacturing to a more limited extent.

While Place of Work employment tells us where the jobs are, Resident Employed Labour Force data indicate the number of residents that are employed irrespective of where the job is located. As shown in Table 10, a similar trend of gain and loss to that observed in Place of Work employment data was exhibited over the 2001 to 2011 time frame. A key difference here, however, is the observation that the level of growth in employed residents which occurred between 2001 and 2006 was significantly higher than growth in employment in Niagara, while the decline in the following period was roughly the same for jobs and employed residents.

Table 10 Total Resident Employed Labour Force Niagara Region, 2001 - 2011			
Year	RELF	Growth	Compound Annual Growth Rate
2001	185,300	--	--
2006	210,300	25,000	2.6%
2011	200,800	(9,500)	-0.9%

Source: Statistics Canada.

Figures are rounded.

The growth in employed residents between 2001 and 2006 correlates with the overall growth in population and housing, much of which was oriented toward the westerly portion of the Region and commuters to the western GTAH market.

Place of Work employment and Resident Employed Labour Force data by local municipality is shown in Tables 11 and 12, respectively. As with population and housing, the change in prospects for the Regional labour force is variable across the Region.

Table 11 Total Place of Work Employment by Local Municipality Niagara Region, 2001 - 2011									
Municipality	POW Employment			Growth		Compound Annual Growth Rate		Share of Regional Growth	
	2001	2006	2011	2001-06	2006-11	2001-06	2006-11	2001-06	2006-11
Fort Erie	11,600	11,900	11,300	300	(600)	0.5%	-1.0%	3%	-6%
Grimsby	6,800	8,100	7,700	1,300	(400)	3.6%	-1.0%	11%	-4%
Lincoln	9,400	10,300	9,700	900	(600)	1.8%	-1.2%	8%	-6%
Niagara Falls	37,400	42,200	41,000	4,800	(1,200)	2.4%	-0.6%	40%	-13%
Niagara-on-the-Lake	10,100	11,100	10,700	1,000	(400)	1.9%	-0.7%	8%	-4%
Pelham	4,000	4,300	4,100	300	(200)	1.5%	-0.9%	3%	-2%
Port Colborne	6,500	6,800	5,900	300	(900)	0.9%	-2.8%	3%	-10%
St. Catharines	63,200	66,100	60,200	2,900	(5,900)	0.9%	-1.9%	24%	-63%
Thorold	8,000	8,300	7,400	300	(900)	0.7%	-2.3%	3%	-10%
Wainfleet	1,500	1,500	1,200	-	(300)	0.0%	-4.4%	0%	-3%
Welland	21,000	20,300	22,100	(700)	1,800	-0.7%	1.7%	-6%	19%
West Lincoln	3,400	4,000	4,300	600	300	3.3%	1.5%	5%	3%
Niagara Region	182,900	194,900	185,600	12,000	(9,300)	1.3%	-1.0%	100%	100%

Source: Statistics Canada. Figures are rounded.

**Place of Work Employment includes No Fixed Employment re-allocated throughout the Region.

Table 12

**Total Resident Employed Labour Force by Local Municipality
Niagara Region, 2001 - 2011**

Municipality	RELF			Growth		Compound Annual Growth Rate		Share of Regional Growth	
	2001	2006	2011	2001-06	2006-11	2001-06	2006-11	2001-06	2006-11
Fort Erie	11,800	13,800	13,400	2,000	(400)	3.2%	-0.6%	8%	-4%
Grimsby	10,500	12,800	12,600	2,300	(200)	4.0%	-0.3%	9%	-2%
Lincoln	9,200	11,000	10,800	1,800	(200)	3.6%	-0.4%	7%	-2%
Niagara Falls	36,400	41,100	39,300	4,700	(1,800)	2.5%	-0.9%	19%	-19%
Niagara-on-the-Lake	6,700	7,300	6,700	600	(600)	1.7%	-1.7%	2%	-6%
Pelham	7,400	8,100	8,100	700	-	1.8%	0.0%	3%	0%
Port Colborne	7,600	8,400	7,900	800	(500)	2.0%	-1.2%	3%	-5%
St. Catharines	57,200	63,900	60,800	6,700	(3,100)	2.2%	-1.0%	27%	-33%
Thorold	8,500	9,500	8,600	1,000	(900)	2.2%	-2.0%	4%	-9%
Wainfleet	2,900	3,500	2,900	600	(600)	3.8%	-3.7%	2%	-6%
Welland	21,300	24,000	22,600	2,700	(1,400)	2.4%	-1.2%	11%	-15%
West Lincoln	5,800	6,900	7,100	1,100	200	3.5%	0.6%	4%	2%
Niagara Region	185,300	210,300	200,800	25,000	(9,500)	2.6%	-0.9%	100%	-100%

Source: Statistics Canada. Figures are rounded.

The pattern of employment throughout the Region has not changed in any significant way over the last two Census periods – the relative distribution of jobs and employed residents between Niagara local municipalities looks basically the same in 2011 as it did in 2001.

The highest concentrations are in the Cities of St. Catharines, Niagara Falls and Welland.

All Niagara municipalities except for West Lincoln and Welland experienced decline in total employment over the 2006 to 2011 Census period, largely owing to the recent recession and a general decline in the manufacturing base of southwestern Ontario. Unique among Niagara municipalities, Welland demonstrated an opposite pattern of employment change over the 2001 to 2011 period: declining in total place of work employment between 2001 and 2006 when all other local municipalities continued to add employment; and growing by roughly 1,800 jobs between 2006 and 2011 when employment throughout most of the Region declined.

West Lincoln was the only Niagara municipality to add net employed residents over 2006 to 2011, which may be associated with out-commuting to the western GTAH.

Niagara exhibits a high proportion of out-commuting, especially in the western portion of the Region. As shown in Table 13 on the following page, most Niagara municipalities experience net out-commuting of residents, largely to other

municipalities within Niagara but a large portion also commute to job opportunities outside of the Region, primarily in the western GTAH.

Table 13 Net Commuting by Local Municipality Niagara Region, 2006 & 2011			
	2006	2011	Change 2006-11
Fort Erie	(1,720)	(1,830)	(110)
Grimsby	(4,150)	(4,365)	(215)
Lincoln	(750)	(815)	(65)
Niagara Falls	1,070	1,255	185
Niagara-on-the-Lake	3,330	3,300	(30)
Pelham	(3,515)	(3,300)	215
Port Colborne	(1,445)	(1,970)	(525)
St. Catharines	1,380	(1,130)	(2,510)
Thorold	(1,295)	(1,525)	(230)
Wainfleet	(1,845)	(1,560)	285
Welland	(3,245)	(880)	2,365
West Lincoln	(2,760)	(2,440)	320
Niagara Region	(14,945)	(15,260)	(315)

The City of Niagara Falls is the only municipality in the Region which had an increase in net in-commuting between 2006 and 2011. Along with Niagara-on-the-Lake, these were the only two municipalities in the Region with net in-commuting in 2011.

St. Catharines, also a key centre for employment within Niagara, underwent a significant shift between 2006 and 2011 and now has more residents leaving for work than commuting in from other communities.

The City of Welland, which continued to add employment over the 2001 to 2011 period, has experienced a significant decline in the number of residents that commute outside the City to work.

The increased number of net out-commuters from Grimsby and Lincoln, the most westerly Niagara communities, speaks to the role of the GTAH job market in influencing the distribution of housing and population in the Region.

In summary, Niagara has been experiencing a slowing growth trend Region-wide since the 1990's. A high growth period in the early 2000s was followed by much more modest growth in population and housing in the 2006 to 2011 Census period coupled with

decline in employment amidst a shifting economic base and high levels of out-commuting of Niagara residents. Housing growth has been increasingly outpacing growth in residents, an outcome of an aging population. The effects of an aging population and the continued out-migration of young adults from the Region will be important considerations in planning for growth and development across Niagara.

E. Measuring Progress

The policy framework of the *Regional Official Plan* is designed to support the policy direction and forecasts of the *Growth Plan* (2006). The MCR presents an opportunity to reflect on the status of growth and to determine the suitability of the current policy framework to support the revised (to 2031) and extended (to 2041) Schedule 3 forecasts adopted through Amendment 2 to the *Growth Plan*.

Examining how current population, housing and employment in the Region compare with the levels anticipated in the *Regional Official Plan* help establish a baseline understanding of achieved versus planned growth in the Region. Exhibits 8 and 9 illustrate anticipated Region-wide population and employment under the original and Schedule 3B forecasts. The updated forecasts anticipate significantly higher population and employment than was anticipated prior. The degree to which the Region is on track to meet these forecasts is being evaluated as part of the MCR process. It is important to note that the growth outlook in Schedule 3 is a policy target based on a demographic forecast and provincial policy objectives.

Exhibit 8

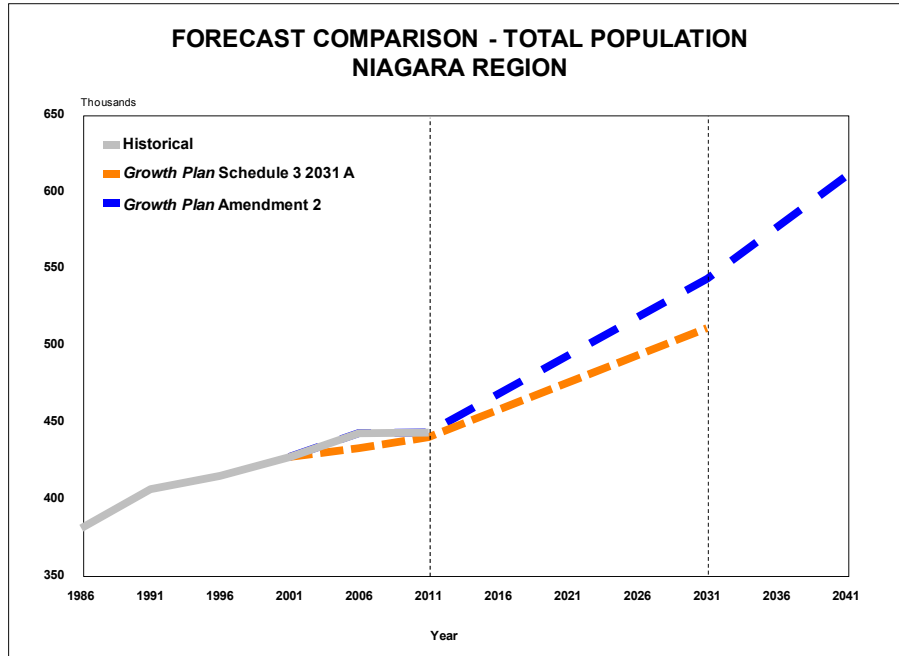
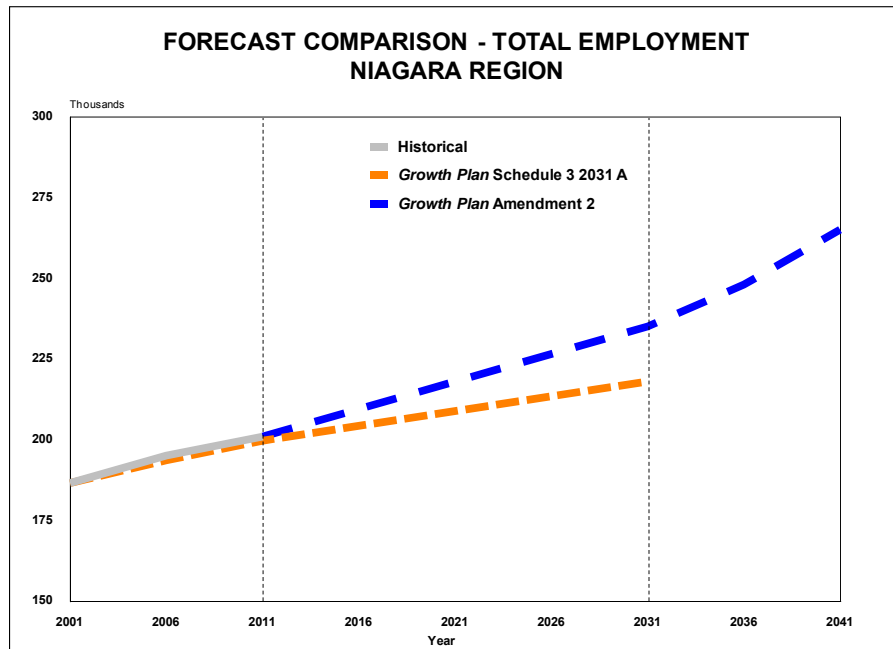


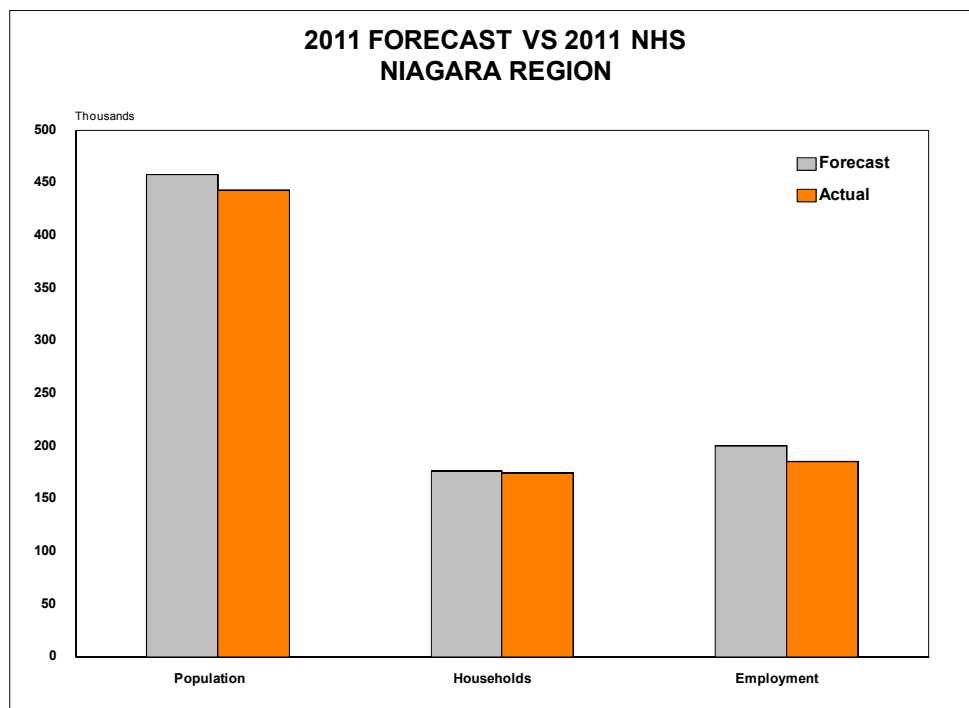
Exhibit 9



Local allocations of the original *Growth Plan* forecasts were prepared as input to the Niagara 2031 process and subsequent *Regional Official Plan* Amendment 2-2009,

establishing benchmarks for the 2011 to 2031 horizon. These allocations were based largely on 2006 Census data and included a forecast figure for 2011.

Exhibit 10



Tables 14, 15 and 16 illustrate how the Region's 2011 forecasts compare with observed results from the 2011 Census and NHS. Recent growth in population, housing and employment has fallen somewhat short of expectations in the early years of the official plan forecasts, although the extent of the shortfall varies at the local municipal level.

Table 14 Comparison - Niagara Region Official Plan (ROP) & Census Results Census Population, 2011				
Municipality	Table 4-1 Forecast	2011 Census	Difference	
			Net	Percent
Fort Erie	32,900	30,800	(2,100)	-6.4%
Grimsby	26,900	26,000	(900)	-3.3%
Lincoln	23,800	23,100	(700)	-2.9%
Niagara Falls	88,200	85,200	(3,000)	-3.4%
Niagara-on-the-Lake	16,800	15,800	(1,000)	-6.0%
Pelham	18,200	17,000	(1,200)	-6.6%
Port Colborne	19,400	18,900	(500)	-2.6%
St. Catharines	137,600	135,000	(2,600)	-1.9%
Thorold	19,200	18,400	(800)	-4.2%
Wainfleet	7,000	6,500	(500)	-7.1%
Welland	53,100	52,000	(1,100)	-2.1%
West Lincoln	15,100	14,200	(900)	-6.0%
Niagara Region	458,200	442,900	(15,300)	-3.3%

Source: Statistics Canada, 2011.

Figures are rounded

Table 15 Comparison - Niagara Region Official Plan (ROP) & Census Results Occupied Households, 2011				
Municipality	Table 4-1 Forecast	2011 Census	Difference	
			Net	Percent
Fort Erie	12,950	12,500	(450)	-3.5%
Grimsby	9,560	9,600	40	0.4%
Lincoln	8,190	8,100	(90)	-1.1%
Niagara Falls	33,750	33,400	(350)	-1.0%
Niagara-on-the-Lake	6,150	5,900	(250)	-4.1%
Pelham	6,420	6,200	(220)	-3.4%
Port Colborne	7,950	7,900	(50)	-0.6%
St. Catharines	55,830	55,400	(430)	-0.8%
Thorold	7,260	7,100	(160)	-2.2%
Wainfleet	2,450	2,300	(150)	-6.1%
Welland	21,320	21,500	180	0.8%
West Lincoln	4,750	4,600	(150)	-3.2%
Niagara Region	176,580	174,500	(2,080)	-1.2%

Source: Statistics Canada, 2011.

Figures are rounded

Table 16 Comparison - Niagara Region Official Plan (ROP) & National Household Survey Results Total Place of Work Employment, 2011				
Municipality	Table 4-1 Forecast	2011 NHS	Difference	
			Net	Percent
Fort Erie	12,580	11,300	(1,280)	-10.2%
Grimsby	8,630	7,700	(930)	-10.8%
Lincoln	10,690	9,700	(990)	-9.3%
Niagara Falls	44,410	41,000	(3,410)	-7.7%
Niagara-on-the-Lake	11,370	10,700	(670)	-5.9%
Pelham	4,470	4,100	(370)	-8.3%
Port Colborne	7,060	5,900	(1,160)	-16.4%
St. Catharines	66,600	60,200	(6,400)	-9.6%
Thorold	8,400	7,400	(1,000)	-11.9%
Wainfleet	1,490	1,200	(290)	-19.5%
Welland	21,170	22,100	930	4.4%
West Lincoln	4,130	4,300	170	4.1%
Niagara Region	201,000	185,600	(15,400)	-7.7%

Source: Statistics Canada, 2011.

Figures are rounded

As noted earlier, a shift in demographics has resulted in housing production outpacing population growth. The shortfall in housing is quite small at 1% while population growth by 2011 was off by 3%, although as noted earlier, more recent data suggests population growth has picked up since 2011. A more significant shortfall is found in employment where the 2011 NHS suggests jobs in the Region are 8% off that forecast. Despite the slight shortfall in recent growth compared with the forecasts, trends suggest that the population target of 511,000 is achievable by 2031. Given recent trends in housing demand, the household target found in Table 4-1 of the *Regional Official Plan* is also achievable. The employment target of 218,000 jobs by 2031 may present more of a challenge given how hard Niagara was hit by job losses during the recent recession.

A detailed assessment of the likelihood of achieving the updated *Growth Plan* Schedule 3B forecast of 543,000 residents and 235,000 jobs at a 2031 horizon will be undertaken in future phases of the Municipal Comprehensive Review as options for growth are identified.

Two important factors affect the reported employment level for 2011:

- The recession of 2008/2009 was certainly not anticipated at the time of the Niagara 2031 exercise; and
- The change in methodology with the cancellation of the long form Census will certainly have some impact on measuring jobs at the municipal level.

IV Significant Potential to Accommodate Growth on Regional Land Supply

A primary input to the MCR is the Regional land budget. In 2011, Regional planning staff prepared an inventory of vacant urban designated lands across Niagara and within each local area municipality. The inventory was updated in 2014 as input to the MCR, identifying the lands available to accommodate population and employment growth under Schedule 3 of the *Growth Plan*. Growth in the Region will be accommodated through greenfield development on Designated Greenfield Areas and through intensification, both through the build-out of vacant lands in built up areas and through redevelopment.

The following assessment of the updated land supply suggests significant potential to accommodate growth in Niagara to a 2041 planning horizon, on a Region-wide basis. However, the distribution of urban designated lands as well as changes to the supply information since 2011, highlight some potential disconnects in the Region between the location of market demand and the urban designated land supply available to accommodate growth which support a notion of differentiated market areas in Niagara. This is an important consideration in the development of growth options, allocations of growth; and potential changes to intensification targets and land supply designations in Phases 3 and 4 of the MCR.

A. Regional Land Budget Approach and Results

The Region's land supply method is provided in Appendix C. A standardized approach was taken by the Region in preparing the land supply inventory, applying a set of assumptions and take-outs guided by Provincial policy. The land supply includes residential and employment designated lands within Built up Areas and Designated Greenfield Areas across Niagara's 12 local municipalities and 27 settlement areas. The inventory was prepared in a manner consistent with *Growth Plan* direction for Designated Greenfield Areas.

The *Growth Plan* provides both the forecasts that the Region must use as a basis for planning as well as direction on managing that growth on urban designated lands. While Provincial policy encourages the preparation of land budgets to inform planning for growth and urban development, the Province has yet to release a standard land budgeting methodology for municipalities.

Section 2.2.7.3 of the *Growth Plan* indicates features that should be excluded from greenfield development areas and measures of gross density, including:

wetlands, coastal wetlands, woodlands, valley lands, areas of natural and scientific interest, habitat of endangered species and threatened species, wildlife habitat, and fish habitat. The area of the features will be defined in accordance with the applicable provincial plan or policy statement that prohibits development in the features.

The Regional land supply inventory was reviewed and updated based on site reviews and consultation with Regional and local municipal staff. The resulting 2016 Regional land supply inventory includes approximately 3,600 gross ha of vacant urban development supply, as shown in Table 17.

Regional Vacant Land Supply Inventory (Gross ha) Niagara Region, 2016					Table 17
Municipality	Residential		Employment		Total
	Built Up Area (BUA)	Designated Greenfield Area (DGA)	Built Up Area (BUA)	Designated Greenfield Area (DGA)	
Fort Erie	175	89	144	46	455
Grimsby	15	4	15	6	40
Lincoln	22	40	30	31	123
Niagara Falls	90	236	130	239	694
Niagara-on-the-Lake	49	69	7	74	199
Pelham	37	126	0	25	188
Port Colborne	48	267	4	104	423
St. Catharines	65	31	48	47	190
Thorold	77	392	57	184	710
Welland	118	119	112	103	452
West Lincoln	10	53	5	59	127
Niagara Region	706	1,424	552	919	3,602

Source: Region of Niagara.

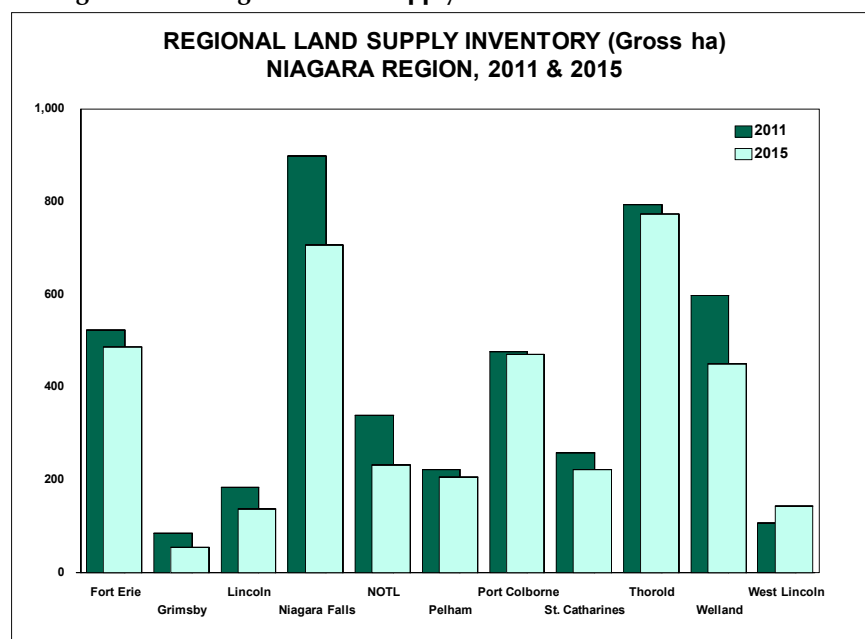
Most of the Regional vacant supply is located on Designated Greenfield Areas. The supply is divided by Regional residential and employment designations. Residential lands may include mixed-use areas designated in local official plans. The employment land supply represents employment lands within the context of the Provincial Policy Statement.

While the Region's available supply of urban designated residential and employment lands is significant, it is not evenly distributed among Niagara municipalities. A key task of the MCR was to determine if and where there are mismatches between the location of supply and anticipated demand for development.

B. Where Has Growth Been Occurring on Niagara's Land Supply?

Exhibit 11 illustrates the change to the overall supply information by local municipality within Niagara since the Regional inventory was prepared in 2011. By and large, a smaller supply of land available in 2016 is a result of urban development taking place since 2011, often referred to as absorption of supply. Some of the change is also owing to technical corrections and information from local municipal staff. While most municipalities are showing a decline in supply, in the case of West Lincoln, a recent urban boundary expansion has increased the designated supply relative to 2011.

Exhibit 11 Change to 2011 Regional Land Supply



The variation in the amount of urban designated land between local area municipalities begins to suggest where pressure for urban development has been occurring in the Region.

Demand for residential lands has been greatest in the municipalities of Grimsby, Niagara-on-the-Lake and Lincoln. Close to 90% of Grimsby's 2011 greenfield residential supply has since been developed. Combined with development on 30% of lands that were available within the Built-up Area, Grimsby has seen a reduction in overall land supply of 60% over a three-year period. This decline in supply occurred in the municipality with the least amount of remaining urban designated lands to begin with.

With the exception of West Lincoln where there was a recent urban boundary expansion for the community of Smithville, the municipalities of north Niagara have the least amount of supply and experienced the highest rates of absorption since 2011. Niagara Falls, St. Catharines and Niagara-on-the-Lake also experienced significant reductions in vacant designated supply for both residential and employment uses in recent years.

While residential lands have been largely absorbed in the north municipalities, changes to the supply of employment lands in Niagara-on-the-Lake, Niagara Falls and in particular, Welland, have also been significant, the latter of which may be an indicator of the potential that could be facilitated through the Gateway Economic Zone and Centre incentives.

Changes to the residential supply in Thorold, Port Colborne and Welland were marginal as was the change to supply for employment in Fort Erie, Port Colborne, Pelham and Thorold, reflecting the slower growth trends in some of Niagara's more southerly communities.

To the extent that reduced supply is not owing to technical corrections but rather to recent absorption of the land supply since the 2011 inventory was prepared, this is an indicator of demand; however, it may not indicate the full extent of demand for municipalities where supply was limited in the first place.

C. Classifying the Supply

To understand the potential and timing for growth, the residential land supply has been classified as follows, irrespective of location within the Built Up Area or Designated Greenfield Area.

- *Planned* – describes the vacant land supply that is already subject to applications for plans of subdivision at various stages of the approval process. These sites would reasonably represent nearer-term growth.
- *Unplanned* – describes the balance of the lands in the supply that are vacant and would reasonably be expected to accommodate growth over the longer term.
- *Redevelopment* – describes lands with some development on site, but which are added to the supply inventory because they are significantly underdeveloped, at less than 5% of site area. These sites have been examined in detail and classified according to an estimate of when they might be redeveloped.

Table 18 summarizes the overall Regional land supply by these characteristics for residential potential.

Regional Land Supply Review, Overall Inventory (Gross ha)											Table 18
Niagara Region, 2016											
Municipality	Residential				Employment		Redevelopment			Total	
	Built Up Area		Designated Greenfield Area		Built-Up Area	Designated Greenfield Area	Short/Medium Term 2021-2031	Medium/Long Term 2031-2041	Longer term Post 2041		
	Planned	Unplanned	Planned	Unplanned							
Fort Erie	19	156	20	69	144	46	10	6	11	482	
Grimsby	10	5	3	0	15	6	3	1	0	44	
Lincoln	5	17	0	39	30	31	7	2	1	133	
Niagara Falls	5	85	59	177	130	239	11	3	-	708	
Niagara-on-the-Lake	6	43	36	33	7	74	2	27	6	234	
Pelham	7	30	43	83	0	25	1	12	5	206	
Port Colborne	13	36	59	208	4	104	39	4	0	466	
St. Catharines	5	60	-	31	48	47	5	25	-	221	
Thorold	65	12	70	322	57	184	39	12	25	786	
Welland	26	92	99	20	112	103	4	4	0	461	
West Lincoln	8	3	11	42	5	59	-	-	-	127	
Niagara Region	169	537	401	1,024	552	919	121	96	49	3,868	

Of the nearly 3,900 ha of total supply, 38% is currently designated for employment purposes, with 552 ha in the Built Up Area and 925 ha in DGAs, representing considerable opportunity for economic growth. The balance of the supply will accommodate future population growth. With over 500 ha in plans of subdivision,

there is considerable potential for near term growth, which could manifest in a variety of built forms as over 200 ha is within the Built Up Area.

Understanding the redevelopment potential of underdeveloped sites is important to evaluating the potential and timing of options for growth. A desktop site by site review of the land supply via Google Earth was completed in order to identify sites which fall within a redevelopment category. Lands with potential for redevelopment were identified and estimates were made on the likely timing of build out based on factors such as current existing use, location, ownership and known development interests. Some sites are not foreseen to hold potential for redevelopment until sometime well beyond the planning horizon for this MCR and have been allocated to a post-2041 time frame, while the rest of these sites will contribute to the accommodation of growth for terms of 2021 – 2031 and from 2031 – 2041. The results of the redevelopment site analysis are summarized in Table 19 below. Detailed results by current designation and location within built up area or Designated Greenfield Area and associated mapping are also provided in Appendix D.

Table 19 Redevelopment Supply (Ha) and Estimated Timing of Potential Redevelopment All Redevelopment Niagara Region, 2016				
Municipality	Short/Medium Term 2021-2031 (ha)	Medium/Long Term 2031-2041 (ha)	Longer term Post 2041 (ha)	Total
Fort Erie	10	6	11	28
Grimsby	3	1	0	4
Lincoln	7	2	1	10
Niagara Falls	11	3	0	14
Niagara-on-the-Lake	2	27	6	34
Pelham	1	12	5	17
Port Colborne	39	4	0	43
St. Catharines	5	25	0	31
Thorold	39	12	25	76
Wainfleet	0	0	0	0
Welland	4	4	0	9
West Lincoln	0	0	0	0
Niagara Region	121	96	49	266

Approximately 266 ha were identified as being potential redevelopment supply, most of which is anticipated to be available within the 2041 planning horizon. Those lands identified as not likely to be redeveloped until well after 2041 will be removed from

the inventory as growth options are developed in Phase 3 of the MCR. These lands largely consist of estate style residential development in greenfield areas which were captured within the Regional land supply methodology (5% underutilization factor), but are very unlikely to undergo redevelopment or infill within a foreseeable future. It is recommended that the Region remove these lands altogether from the inventory as they do not represent developable or redevelopment supply in a *Growth Plan* or otherwise context.

The identified redevelopment supply is not intended to be exhaustive of such opportunities in the Region however it provides an idea of a quantum of land in the land supply inventory that may currently be underutilized or suitable for redevelopment within a foreseeable future. This could contribute to intensification along with the build-out of vacant lands within built up areas.

Some local area municipalities within Niagara have also undertaken work to identify local capacities for intensification. For example, the City of St. Catharines has prepared an analysis of residential unit potential on vacant lands and through redevelopment within the built up areas of the City, revealing a potential of between 3,551 and 8,706 units.

While, in theory, the supply for intensification can far exceed any expectation of demand, development and more so, redevelopment, of properties within the Built Up Area depends on a complex range of factors that are not necessarily influenced by planning policy. These include, but are not limited to; private owner decision-making, developer interests, servicing capacity and costs, market demand for higher density housing forms and broader economic trends that influence the overall growth in the Region.

D. Niagara Appears to be Achieving Its Growth Plan Minimum Intensification Target but a Cautionary Approach Is Suggested

As described earlier, the Region is required to plan for a Region-wide minimum intensification target of 40% and is working towards achieving this through established and monitored local minimum targets for the built up areas of each local municipality supported by policy and initiatives on the part of local municipalities.

The local municipal intensification targets set out by the Region will be reviewed and as appropriate, updated as part of the development of growth options through the MCR process. Of assistance to this analysis, the Region has been monitoring the amount of residential development that has been occurring within built up areas and on Designated Greenfield Areas within Niagara's municipalities as part of its ongoing *Growth Plan* conformity work. Exhibits 12 and 13 below illustrate how rates of residential development within the built up area by local municipality and Region-wide relate to the targets, since the adoption of the *Growth Plan* in 2006, to 2013; and for the year 2014.

Exhibit 12 Intensification 2006-2013

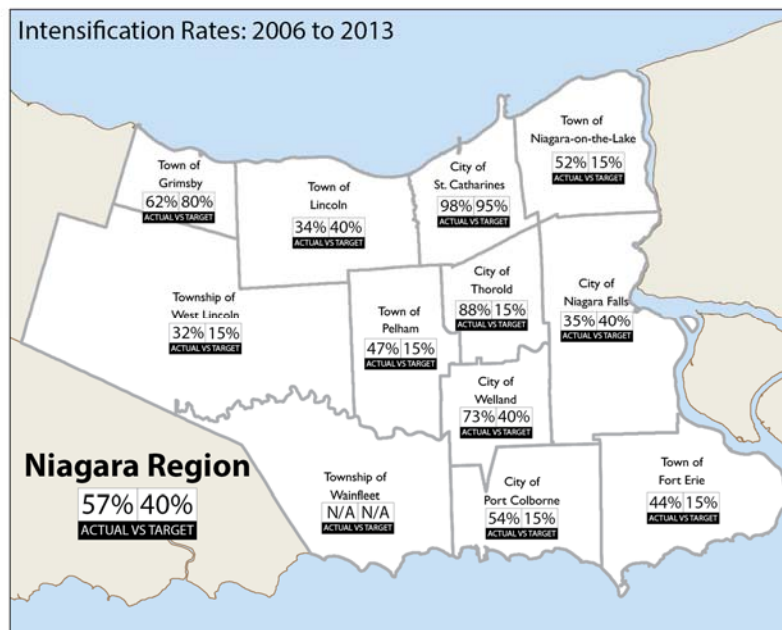
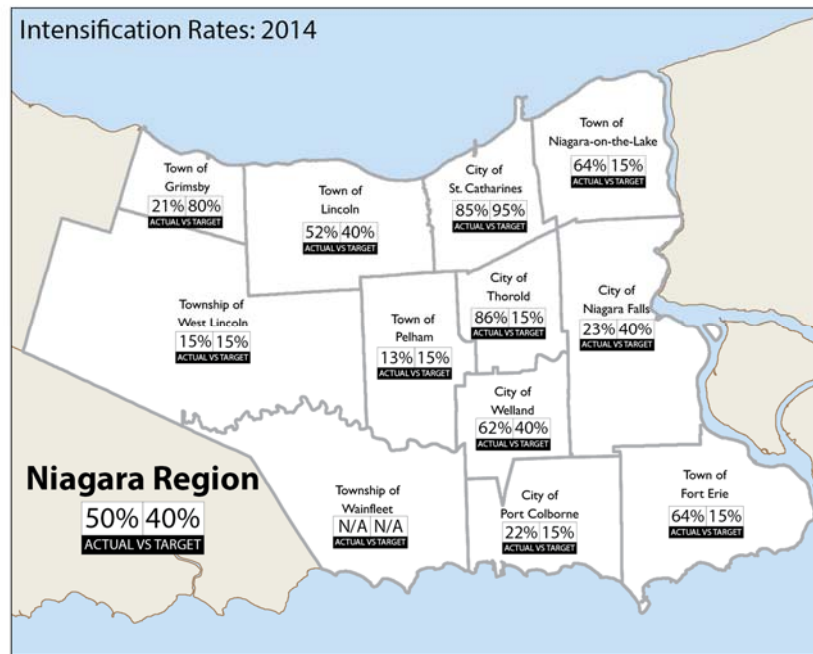


Exhibit 13 Intensification 2014



The local area municipalities have established a strong policy framework to support intensification in a manner which reflects the individual context of each community. In almost all cases, the local official plans have been updated or are in the process of being updated to incorporate intensification strategies. In the majority of cases, the Plans identify specific areas as a focus for intensification, particularly downtown areas or specific arterial corridors. Direction is provided with respect to the form of intensification and related urban design considerations. In some cases, provisions are also made for incentives for intensification or other approaches such as prohibition on downzoning of high density residential site. In addition, direction is also provided with respect to the form of intensification permitted in stable residential areas (e.g. garden suites, accessory residential units).

With a target of 150 jobs and residents per hectare to be achieved by 2031, downtown St. Catharines has a current density in the order of 125 to 130 residents and jobs per hectare according to local municipal planning staff. Recent investments have brought to the downtown a new spectator facility, and an arts campus for Brock University along with a City Arts Centre which could stimulate interest in the revitalization of St. Paul Street where there is some nascent interest in upgrading the commercial

environment. There could be some challenges, however, in stimulating large scale mixed use developments. The UGC includes some former industrial parcels which may need remediation, while just outside the UGC boundary are two former hospital sites and a 50 acre former GM plant which could also become targets for regeneration.

Many local municipalities, and the Region as a whole, appear to be exceeding their intensification targets with a Region-wide achievement of 50%. However, a note of caution in interpreting these figures is advised. This is because much of the “intensification” which has occurred in Niagara since the Region began monitoring progress toward the *Growth Plan* target of 40%, could be characterized as greenfield style development occurring in partially completed new subdivisions within the delineated built up areas of some municipalities.

Including development of low density housing in what would normally be considered a Greenfield setting appears to be technically consistent with *Growth Plan* policy when located within the built boundary. This is not a condition unique to Niagara but is also found in many municipalities across the Greater Golden Horseshoe where the boundaries of built up areas captured undeveloped plans of subdivisions that are now being built out. The resulting inflation of intensification rates has drawn critique from urban research organizations such as The Neptis Foundation, which suggests that the 40% *Growth Plan* target fails to distinguish between effective and ineffective intensification in terms of achieving the growth management goals of the *Growth Plan*. Specifically, it is questioned whether a municipality can achieve its intensification target without achieving the goals of intensification policy¹. While development in this form may count towards the target, it may do little to promote the underlying goals of intensification, such as efficient use of infrastructure and development at transit-supportive densities.

Over time, the measure of development within built up areas should more closely align with notions of “true” intensification, commonly understood to be characterized by higher density development forms (e.g. row houses and apartments), and defined in the PPS as:

¹ *Implementing Residential Intensification Targets: Lessons from Research on Intensification Rates in Ontario. The Neptis Foundation, 2010.*

the development of a property, site or area at a higher density than currently exists through:

- a) redevelopment, including the reuse of brownfield sites;
- b) the development of vacant and/or underutilized lots within previously developed areas;
- c) infill development; or
- d) the expansion or conversion of existing buildings.

The extent to which higher density forms of intensification will play a role in accommodating future growth in Niagara is driven by a range of policy, supply and market factors. The MCR must recognize these factors in considering local capacities for, and the allocation of, planned growth throughout urban areas of the Region. Sustaining a Region-wide intensification rate above 40% will likely require significant re-urbanization in the more urban parts of Niagara.

Residential growth in Niagara continues to be largely driven by demand for lower density ground oriented housing – in the north/west by commuters to the western GTAH and in other parts of the Region by those seeking a small town feel and relatively more affordable housing choices. This latter group includes seniors and contributes to the decline in average household size for some municipalities. As discussed in section 3 addressing growth trends, single-detached dwellings have historically represented, and continue to represent, the largest portion of the Region’s housing market, over 90% of housing stock in some local area municipalities. Planned residential development and recent building activity suggest a lower density trend will continue with a limited shift to higher density occurring in some municipalities, particularly where greenfield residential supply may become scarce.

Average Density of Planned Residential Development* Niagara Region							Table 20
Municipality	Built Up Area			Designated Greenfield Area			
	Ha	Units	Density (units/ha)	Ha	Units	Density (units/ha)	
Fort Erie	104	826	8	93	415	4	
Grimsby	53	1,521	29	3	55	16	
Lincoln	43	61	1	24	629	26	
Niagara Falls	33	776	23	166	1,040	6	
Niagara-on-the-Lake	6	487	76	105	279	3	
Pelham	5	331	65	58	3,160	54	
Port Colborne	13	322	25	71	174	2	
St. Catharines	30	491	17	11	718	66	
Thorold	73	347	5	91	1,936	21	
Welland	48	1,068	22	180	552	3	
West Lincoln	11	44	4	43	1,541	36	
Niagara Region	419	6,274	15	846	10,499	12	

*Based on available information provided by Niagara Region. Plans for which land area or unit count information was incomplete have been excluded for the purposes of this table.

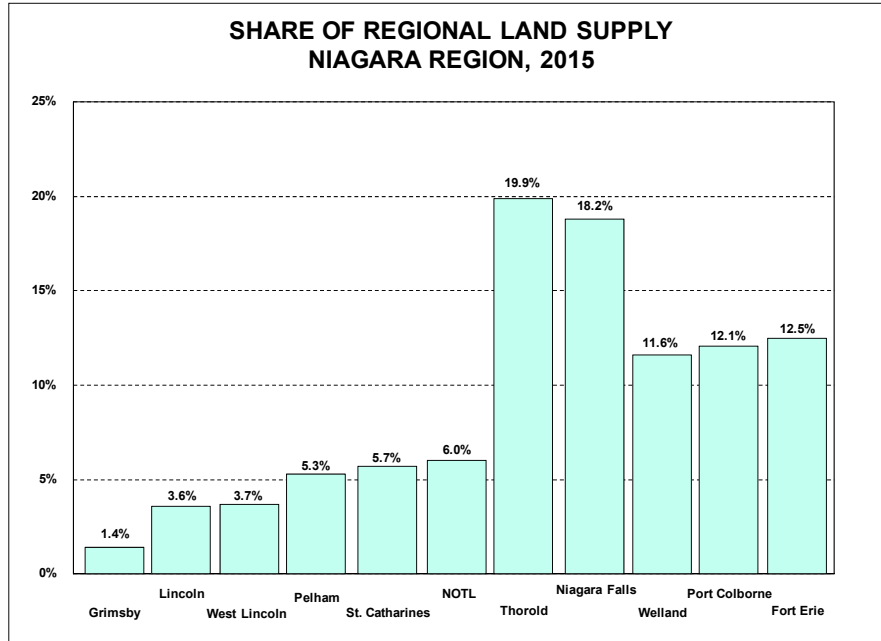
While some municipalities are beginning to see a shift toward medium and higher density residential development, the availability of supply for single- and semi-detached ground-oriented housing will continue to play an important role in accommodating future growth in the Region over the planning horizon to 2041.

E. Potential Disconnect Between Locations of Land Supply and Housing Demand

Historic and emerging growth trends considered in the context of the updated Regional land supply inventory highlight somewhat of an imbalance between demand for urban development and the location of the land supply available. As described earlier, municipalities in north and central Niagara along the QEW are experiencing growth pressures, in particular for commuter-based housing for residents working in the western GTAH. These are the same areas where land supply is becoming more limited, in particular in greenfield settings. At the same time, land supply is relatively abundant in the more southerly municipalities, further from the sphere of influence of the GTAH economic region, and where growth has been slower for decades. Exhibit

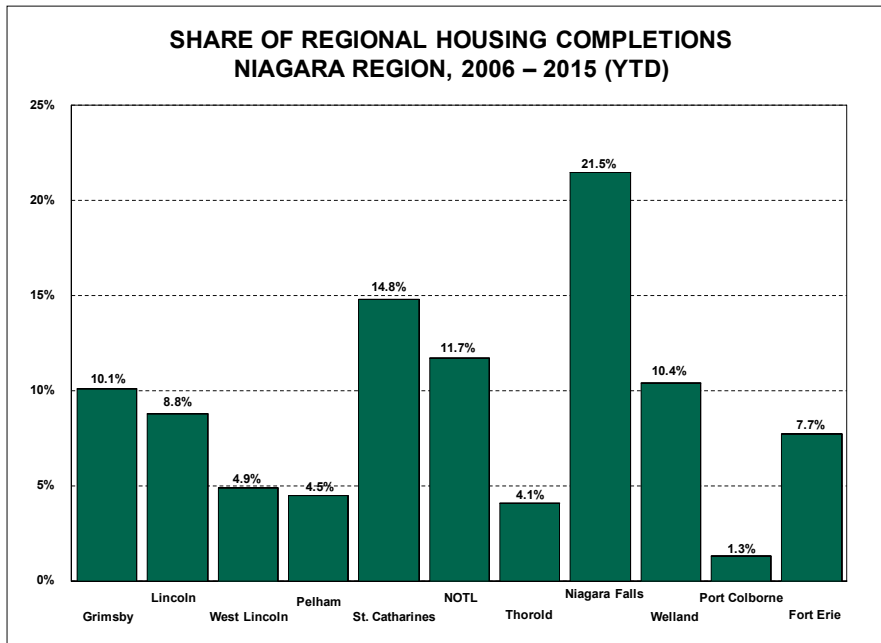
14 and 15 below highlight the distribution of residential land supply and housing development activity in the Region.

Exhibit 14 Share of Regional Land Supply, 2015



Source: Hemson Consulting Ltd.

Exhibit 15 Share of Regional Housing Completions, 2006-2015



Source: Hemson Consulting Ltd. based on CMHC Housing Market Tables.

The graphics allude to some disconnects that should be considered as options for growth are developed:

- The municipalities of Grimsby, Lincoln, West Lincoln and St. Catharines have the smallest shares of the Regional land supply and yet are the municipalities where demand for housing growth has been, and is anticipated to remain, strong, owing in large part to the location of these municipalities within the western GTAH commuter shed and along the QEW corridor.
- Niagara-on-the-Lake likewise is anticipated to experience continued pressure for growth owing to its unique lifestyle amenities; however, has only a marginal share of the Region's available land supply.
- Conversely, the municipalities of Thorold and Port Colborne each contain significant shares of the Region's urban designated land supply but are among the slowest growth municipalities in Niagara and have been for some time.
- Niagara Falls has both significant supply and is expected to continue to be a driver for growth in the Region as a key urban centre along the QEW corridor.

The distribution of urban designated lands within the Region is a key focus of the MCR. The capacity to accommodate growth at the local level underpins the ability of the Region to achieve its growth outlook under Schedule 3 and to evolve in a manner consistent with a shared vision for Niagara's future growth and urban development.

F. Capacity to Accommodate Future Growth Varies Widely Among Niagara Municipalities

An analysis of the capacity to accommodate residential and employment growth on vacant unplanned lands across Niagara's built up and greenfield areas was undertaken in order to understand where the Region sits in relation to the growth being planned for under the *Growth Plan* Schedule 3 forecasts to 2041. In the next phases of the MCR, the local municipal allocations of population, housing and employment growth contained within the *Regional Official Plan* will be reviewed and may be revised as appropriate to reflect a preferred option for growth.

1. Residential

The capacity analysis for residential growth was undertaken by applying a range of test densities to the vacant unplanned residential land supply to identify an estimated potential unit yield. A forecast average household size (persons per unit) was then applied to the unit range to estimate the potential population growth.

It is noted that this does not account for declining household size in the existing housing base which will occur over time due to the aging of the population. At a Regional level, average household size is forecast to decline from 2.42 in 2011 to 2.37 persons per unit in 2041. The result of the decline in average household size is that over time more units will be required to house fewer residents, both in new units and in the existing base. The population growth estimates are therefore not intended to capture total population at the forecast horizon – they are only providing a general estimate of a quantum of population growth that could be accommodated in new units over the build-out of the current vacant supply. Additionally, this does not take into account servicing capacity related constraints which will be identified through consultation with the Master Servicing Plan team in the development of growth options phase.

A density range was applied to the vacant land supply based on location within the built up area or on DGA lands. A range of 16, 32 and 48 units per ha was applied to Designated Greenfield Areas consistent with local official plan direction and planned densities in Niagara Region. A range of 30, 60 and 90 units per ha was applied to intensification sites in built up areas where higher density development should be occurring. The results are shown in Tables 22 and 23 below.

<div>Table 22</div> <div>Estimated Capacity to Accommodate Residential Growth on Vacant Lands in Built Up Areas (BUAs)</div> <div>Niagara Region, 2015</div>				
Municipality	Vacant Supply (gross ha)	Unplanned Unit Potential Based on Density Range (upgh)		
		30	60	90
Fort Erie	156	4,670	9,340	14,010
Grimsby	5	155	310	464
Lincoln	17	513	1,027	1,540
Niagara Falls	85	2,539	5,078	7,617
Niagara-on-the-Lake	43	1,296	2,592	3,888
Pelham	30	894	1,788	2,682
Port Colborne	36	1,070	2,140	3,211
St. Catharines	60	1,787	3,574	5,360
Thorold	12	349	698	1,048
Welland	92	2,765	5,530	8,296
West Lincoln	3	78	156	234
Niagara Region	537	16,116	32,233	48,349

<div>Table 23</div> <div>Estimated Capacity to Accommodate Residential Growth on Vacant Lands in Designated Greenfield Areas (DGAs)</div> <div>Niagara Region, 2015</div>				
Municipality	Vacant Supply (gross ha)	Unplanned Unit Potential Based on Density Range (upgh)		
		16	32	48
Fort Erie	69	1,103	2,206	3,309
Grimsby	0.2	2	5	7
Lincoln	39	628	1,256	1,884
Niagara Falls	177	2,826	5,653	8,479
Niagara-on-the-Lake	33	528	1,056	1,584
Pelham	83	1,323	2,647	3,970
Port Colborne	208	3,333	6,665	9,998
St. Catharines	31	492	984	1,475
Thorold	322	5,146	10,293	15,439
Welland	20	321	643	964
West Lincoln	42	675	1,351	2,026
Niagara Region	1,024	16,379	32,758	49,137

Based on the above, an estimated range of unit growth between 36,000 and 97,000 additional households could be accommodated on currently vacant, unplanned BUA and DGA lands, Region-wide. This is in addition to growth through redevelopment and in plans of subdivision.

The *Growth Plan* calls for the addition of 168,000 residents by 2041. The overall quantum of urban designated land Region-wide has the potential to accommodate this level of planned growth at the Regional level, provided the Region doesn't build-out entirely at the lowest density contemplated. This growth potential however varies significantly at the local municipal level. The results for Grimsby for example, indicate very limited capacity of up to 7 units on vacant greenfield lands; while Thorold could accommodate an additional 15,000 greenfield units.

The capacity estimates do not include additional growth that will occur on vacant lands already under plans nor does it include the potential from redevelopment opportunities, the timing of which is less certain but will also contribute to some growth going forward. The decline in average household size will also affect the quantum of unit demand and associated quantum of land going forward with fewer residents being housed in the existing base and through new development.

Another primary consideration in assessing growth potential on the Regional land supply is the level of existing and planned servicing capacity to meet the demands of growth. The viability of the land supply from an infrastructure and servicing capacity will be examined as input to the development of growth options in Phase 3 of the MCR as the growth options evaluation criteria will include implications and cost of servicing, vetted through the Regional Transportation Master and Water and Waste Water Master Servicing Plans being undertaken concurrent with the MCR.

2. Employment

A high level analysis of Niagara's employment land supply was also undertaken. The Region has nearly 1,500 ha of designated employment lands, again unevenly distributed among Niagara municipalities, with the largest concentrations of supply being in the municipalities of Niagara Falls, Thorold, Welland and Fort Erie.

Table 24 Vacant Designated Employment Land Supply Niagara Region, 2015			
Municipality	Built-Up Area	Designated Greenfield Area	Total
Fort Erie	144	46	190
Grimsby	15	6	21
Lincoln	30	31	61
Niagara Falls	130	239	369
Niagara-on-the-Lake	7	74	81
Pelham	0	25	25
Port Colborne	4	104	108
St. Catharines	48	47	95
Thorold	57	184	241
Welland	112	103	215
West Lincoln	5	59	64
Niagara Region	552	919	1,471

The Region is planning for an additional 80,000 jobs between 2011 and 2041 under *Growth Plan* Schedule 3. The following breakdown of employment by land-based category underpins the Schedule 3 forecasts at the Regional-level:

- Roughly 35% will be in population-related employment (e.g. retail, education, personal services, healthcare and those who work at home), in response to the need for services from a growing resident population. This type of employment will be accommodated throughout both employment and residential land supply designations within the built-up and greenfield areas of the Region;
- Approximately 50% of Niagara's future employment growth is forecast to be in employment land employment – that is the range of businesses occupying traditional industrial type space;
- 9% is anticipated to be located in office, primarily smaller scale with some major office growth in the City of St. Catharines; and
- 6% will be in other Rural-based employment which will occur throughout the rural area and agricultural areas of the Region.

This analysis considers the capacity of designated employment lands to accommodate employment land employment growth. These are the lands to which PPS and *Growth Plan* employment area and conversion policies apply and where half of the Region's future employment growth is expected to occur.

A standard net-to-gross, underutilization and long-term vacancy adjustments have been made to the supply to further estimate the amount of land that would be available to accommodate employment growth. This will vary on-the-ground based on local conditions and the nature of the supply in terms of configuration, location, size, parcel subdivision and other factors. A density range of 20, 25, 30 and 40 jobs per adjusted net ha was applied to the Regional employment land inventory. This represents a range based on market observations and Provincial and Regional growth management policy objectives. The resulting estimated range on employment growth potential on designated employment lands is shown in Table 25 below.

Table 25 Estimated Capacity of Vacant Designated Greenfield Area Employment Land Supply Niagara Region, 2015							
Municipality	DGA & BUA Employment Land	Net ha*	Adjusted**	Employment growth based on density range (jobs/ net ha)			
				20	25	30	40
Fort Erie	190	152	130	3,047	3,809	4,571	6,094
Grimsby	21	17	14	338	423	507	676
Lincoln	61	49	42	981	1,226	1,472	1,962
Niagara Falls	369	295	251	5,900	7,375	8,850	11,799
Niagara-on-the-Lake	81	65	55	1,299	1,624	1,948	2,598
Pelham	25	20	17	406	508	609	813
Port Colborne	108	86	73	1,723	2,154	2,584	3,446
St. Catharines	95	76	65	1,521	1,902	2,282	3,043
Thorold	241	193	164	3,858	4,823	5,788	7,717
Welland	215	172	146	3,439	4,299	5,158	6,878
West Lincoln	64	51	44	1,025	1,282	1,538	2,051
Niagara Region	1,471	1,177	1,000	23,538	29,423	35,307	47,076

*Based on a standard 80% net to gross adjustment.

**15% Adjustment to account for long-term vacancy and underutilization.

The purpose of the capacity analysis at this point, is to gain a sense of the range of potential growth. A range of local market, site characteristics and servicing conditions will ultimately affect the actual amount of growth potential and timing of development. These factors will be more closely examined through the MCR in the development of growth options for the Region and the preferred growth option that will form the basis of allocating Schedule 3 employment growth among Niagara municipalities.

It is not anticipated that intensification of employment lands will play a large role in accommodating employment growth in the Region. Infill and intensification of the building stock do occur over time in employment areas as additions are constructed and, rarely, sites are redeveloped for new employment uses. Employment may rise on individual sites as this occurs. However, this infill and intensification rarely, if ever, results in growth in the total employment of an employment area, since most employment lands experience stable to declining employment as they age. At best,

infill and intensification operate to keep the employment in an employment area stable, but it cannot be relied on to accommodate employment growth.

The likelihood and timing of Niagara's vacant employment lands coming to market furthermore depends on a range of factors such as the shovel-readiness of lands, location within the Region, proximity to transportation corridors and broader and local economic trends. As with the residential supply, the viability of designated employment lands at the local municipal level will be assessed through the TMP and the MSP as part of the MCR growth options evaluative phase.

G. Looking Forward – What Does It Mean for The MCR?

It appears that there is a sufficient overall quantum of urban designated land to meet forecast demand for growth attached to the updated *Growth Plan* Schedule 3 to a 2041 horizon – however, the distribution of these lands by local municipality and by residential and employment designations may not be best situated to achieve the forecasts. There are many additional opportunities to accommodate growth through intensification and redevelopment in the Region. Over time, development within built up areas of Niagara may come to more completely embody the policy goals of intensification for higher density development, the development of compact communities and the efficient use of infrastructure.

The capacity to accommodate population and employment growth is unevenly distributed across Niagara municipalities, which may pose a challenge for planning to meet the Regions' Schedule 3 outlook. The distribution of vacant urban designated land across a geographically large and dispersed Region is in some areas misaligned with pressures for growth. As part of the MCR process, the land supply may be rationalized to reflect the shared urban vision for the Region and to better match anticipated growth with the designated land supply to accommodate said growth going forward, taking into consideration the range of policy, market and supply factors at play in Niagara Region.

V Recognizing Challenges and Opportunities

The Regional MCR and Official Plan Review are taking place at a critical point in time. A number of important influences and trends are at play in the Region that could affect the pace and pattern of growth and development over the next 20 years or more.

- The Province is in the midst of a co-ordinated review of land use planning policy that will influence the future of the Region through potential changes to the *Growth Plan*, *Greenbelt Plan* and *Niagara Escarpment Plan*.
- The recession of 2008 / 2009 had a significant impact on growth in Niagara, as shown by the 2011 Census results, and a sluggish recovery is still notably felt across Niagara.
- Major infrastructure decisions that may be made by the Province could significantly shape future growth in Niagara:
 - Potential extension of GO Rail service to Niagara;
 - South Niagara Hospital;
 - University satellite campuses;
 - Widening of the QEW highway; and
 - Mid-peninsula highway to the U.S. border.

With these forces and uncertainties in the background, the Region must plan to the Province's updated Schedule 3 forecasts of population and employment for Niagara which are significantly higher than those in the current *Regional Official Plan*. There are numerous challenges to be addressed through the Regional MCR and Official Plan Review if the future envisioned by the *Growth Plan* is to be realized; at the same time numerous opportunities to address these challenges present themselves.

An overriding challenge facing the Region within this MCR exercise is the recent and current slow rate of growth. Most, if not all, significant issues that could influence the options for growth, as well as the planning and implementation work that would be required, relate to the slow pace of growth and prospects for meeting the targets assigned by the *Growth Plan*.

The opportunity that presents itself here is that of aligning growth management policy with new economic development objectives that capitalize on the Region's strengths and position it for a more diverse future. Regional Council has realized that improved economic prospects are necessary if the Region's population is going to grow, including jobs in new and emerging sectors. Moreover, there is an important role for the Province to play in a more prosperous Niagara. This imperative has informed Regional Council's position on the Co-ordinated Plan Review and in other dealings with the Province, including, for example, discussions around the potential for extending GO Rail service to Niagara.

Regional Council has recognized these challenges and has set the stage to address them and to realize opportunities with clear strategic objectives that have guided Regional input on the Provincial Review of the *Growth Plan*, *Greenbelt Plan* and *Niagara Escarpment Plan*.

A. Challenges and Opportunities

During the first phase of work on the MCR, interviews were held with planning staff from the area municipalities to review current conditions, emerging trends and the status of infrastructure needs. This first round of engagement also included Regional staff involved in Planning, Transportation and Water and Wastewater servicing. Additional insight was sought from the Niagara Homebuilders, the Chamber of Commerce, Niagara District School Board and the Niagara Peninsula Conservation Authority. The insights gleaned from this first round of stakeholder engagement highlight key challenges and point to important opportunities to be considered as the Regional MCR progresses. This input reinforces our assessment of challenges and opportunities arising from our analysis of trends and prospects.

1. Growth Management

- The Region is not growing and the population is aging, yet there is demand for single family housing in Greenfield settings, in townhouse form in some municipalities, leading to somewhat higher Greenfield densities.
- The pattern of an aging population in urban areas and younger families in new housing has led to issues around school closures. Some municipalities are

managing the process of dealing with school closures or mergers well, while others are challenged.

- This is especially true where schools are being closed in established urban areas, while growth trends indicate that a new school may need to be planned for the near future in newly urbanizing areas.
- Policy should recognize “natural” growth areas; the power of demographics and affordability can limit the influence of policy. Currently, areas experiencing growth pressures are primarily in the municipalities in the northern part of Niagara, including Niagara Falls.
 - As part of the public commentary on the *Growth Plan* and *Greenbelt Plan* Reviews, all submissions from private land owners for re-designation to some sort of urban potential are located in these northern municipalities.
- Some municipalities are on track with the growth assignments currently found in the Regional Official Plan – for others, recent growth has been limited. This is an appropriate time to adjust the long term growth allocations to area municipalities. There has been some change in housing share and type in some parts of the Region since the current allocations were adopted.
- Policy should maintain distinct identifiable urban communities.
- The Region has advocated for the removal of urban areas from the *Niagara Escarpment Plan* to facilitate denser development in established settlement areas.
- There are two sets of rules for some agricultural areas; under the *Niagara Escarpment Plan* and under the *Greenbelt Plan*.
 - The *NEP* does not consider value added agricultural uses which may be key to the local economy.
 - The *Greenbelt* has sterilized some lands which are not viable for agricultural use and might be better suited for other uses.
- In some municipalities, seasonal communities are transitioning to permanent by way of minor variance applications.

2. Designated Greenfields / Municipal Servicing

- There is a Region-wide mismatch between land supply and market demand and the MCR process is an opportunity to adjust the misallocations of growth.
 - The land supply assessment in the preceding section reveals a significant surplus of Greenfield lands designated for urban growth in southern municipalities where demand has been quite slow for some time.
 - At the same time, some northern municipalities will build out their remaining Designated Greenfield areas within the planning horizon.
- Some municipalities have lands designated for urban uses which may not arrive for many years, if ever.
 - Some of these lands are not serviced and extending municipal servicing is challenged by distance, physical conditions and cost.
- Stakeholders recognize the permanence of the Greenbelt and are cognizant of the rarity and scarcity of land. However, there may be some locations within the Greenbelt where there are well established uses, especially employment uses, whose potential growth might be affected by Greenbelt policy.
 - for changes to the *Greenbelt Plan* to allow for special policy areas.

3. Intensification

- Some municipalities are on track with the targets currently in place in the *Regional Official Plan*. However, local municipal intensification targets should be reviewed and some adjusted.
 - The inclusion of unbuilt approved plans of subdivision within the Built Up Area as shown in Official Plan maps has inflated intensification achievements. Understanding the potential for true intensification – the re-urbanization of the Built Up Area at higher densities – will be important to allocating shares of growth.
- There are considerable opportunities within the urban fabric of the larger municipalities to meet the intensification targets, however, the market potential may take some years to emerge.

- It was observed that the local market is highly competitive, with considerable offerings of new single family homes in competition with condominiums in intensification areas.
- The prevalence of small parcels within some designated intensification corridors is slowing intensification due to the expense and time required to assemble large development sites.
 - In St. Catharines this has led the market to migrate to ‘easier’ sites as intensification is taking shape as townhouse and modest redevelopment in established neighbourhoods and small infill pockets.
- Still, intensification is taking root in some municipalities: Welland Mills in Thorold was converted to apartments; interest is growing in Grimsby for high density residential; a condo townhouse development is underway in Smithville.
- The addition of Brock University’s Marilyn I. Walker School of Fine and Performing Arts, as well as the First Ontario Performing Arts Centre and the Meridian Centre have given a boost to the revitalization of downtown St. Catharines. Residential intensification is sure to follow.
- The potential of extending GO Rail service to Niagara Region offers a significant opportunity to realize intensification objectives as well as economic development objectives if plans can be put in place to guide the establishment of Transit Hubs and Stations.
 - The Region has initiated a study for transit hubs in Grimsby, Lincoln, St. Catharines and Niagara Falls.

4. Economic Development

- A more focused Regional approach to economic development, is taking shape.

The development of the arts facilities and a strong university presence in downtown St. Catharines should facilitate a diversification in the Region’s economic base.

- While there may be a large supply of Greenfield land designated for employment, the location is critical. Some of this supply may not be in the most desirable location, or the parcel size may be a concern for attracting employers.

- There may be a potential conflict between agricultural and environmental policy.
 - There is a new focus in some parts of the region on agri-tourism, and the economic value of agriculture needs to be recognized as part of the employment picture.
- While many large manufacturers have left the Region, there are still around 700 manufacturing establishments in Niagara. There are opportunities for growth in smaller firms, especially those engaged in advanced manufacturing.
- The Gateway C.I.P. is showing success as a lever for attracting jobs to the Region.
- More attention should be paid to the Port as recognized in the *Growth Plan*. A recent study in Port Colborne looked at re-establishing a railway spur along the canal wall to increase flexibility for port uses, including a container port.
- Brownfields in the vicinity of the Urban Growth Centre in downtown St. Catharines could provide unique opportunities.
 - Determining if they will be redeveloped for economic purposes or re-designated for mixed use could have implications for Designated Greenfields that are reserved for employment purposes.
- There should be a dialogue about the role that new ‘creative economy’ opportunities can play in Niagara, especially for occupations that are footloose, where people can work from home without reporting to a typical place of work.
 - This is a notable concern for examining the relationship of Niagara’s economy with that of the GTAH, especially given housing prices in the GTAH.

B. Moving Forward: Developing and Evaluating Options for Growth

As noted earlier, the *Regional Official Plan* has a sound policy framework to guide long-term growth and development. The Sustainable Urban Vision and Common Objectives articulated through Niagara 2031 and found in Section 4.G of the *Regional Official Plan* remain valid as a foundation for growth management policy and will

continue to guide this Municipal Comprehensive Review. The wide ranging challenges and opportunities enumerated above will inform the development of growth options. The next phases of the Regional MCR involve outlining preliminary options for growth, and through consultation with the public and stakeholders, identifying a preferred growth option. The growth options will focus on two target years for allocations of population and employment:

- **2036:** The *Provincial Policy Statement (PPS)* requires municipalities to ensure there is a 20-year supply of land for housing, through intensification of the current built up area as well as designated greenfields, to accommodate Niagara's allocation of population in the *Growth Plan* of 577,000 along with 248,000 jobs. Given this MCR will be completed in late 2016, the 20-year supply horizon should be 2036.
- **2041:** The PPS also permits planning beyond the 20-year horizon when it comes to protecting employment lands and planning for major infrastructure. The *Growth Plan* includes targets for the year 2041 for Niagara Region of 265,000 jobs and a population of 610,000. These targets will also guide discussions regarding the protection of employment lands and planning for major infrastructure to service the population and jobs.

It is important to conclude this phase of the MCR project with some key directions to guide the development and evaluation of options.

Decision-making Based on Partnership and Collaboration

Foremost as this MCR exercise proceeds, it is imperative that all municipal stakeholders be partners in this initiative. Area planning officials will make an important contribution throughout the research phases and contribute to the development of criteria for evaluating options toward the identification of a preferred option.

Urban Growth Centre Should Be Focal Point

All options should recognize the role the Urban Growth Centre can play as a location for residential intensification and new employment growth.

Appropriate Growth Allocations Among Area Municipalities

Review and revise the allocation of growth targets to the area municipalities for the planning horizon years of 2031, 2036 and 2041.

Intensification Appropriate to the Character of the Area Municipality

Review intensification potential and update or confirm targets that are appropriate and achievable.

Evaluate Growth Prospects Based on Market and Policy

Guided by the Sustainable Urban Vision, critically evaluate suitability of lands currently in Designated Greenfields.

- Is it reasonable to assume these lands will build out within the planning horizon given demographics and market trends?
- Examine implications of build out up to the Greenbelt limit within the time horizon for some municipalities.

Align Growth Management with Economic Development Priorities

The past focus on traditional lower density industry does not reflect current Regional trends toward a more urban, service-based economy.

By recognizing the QEW corridor as a key economic corridor and a natural area for growth along with Downtown St. Catharines, the downtowns of the major urban settlements and key employment concentrations, an urban structure for the Region can be developed based on a centres and corridors approach which facilitates economic growth. Regional Road #20 could become an important corridor linking to the Hamilton airport.

Implement a New Urban Structure Strategy

The *Growth Plan* and *Greenbelt Plan* changed the context for growth management and placed an emphasis on urban centres and transportation corridors. The Region now needs a contemporary policy framework which is aligned to current Provincial policy objectives and which will capitalize on Regional and Provincial infrastructure initiatives.

All options for growth should recognize the need for a more current urban structure strategy that places a priority on growing urban areas that will best position Niagara for a more sustainable model of growth for all urban areas over the long term. This strategy should take advantage of existing concentrations of transit and transportation services, institutional uses, and short-term market demand as well as the prospect for extending GO rail service to the Region.

VI Concluding Remarks and Study Next Steps

This report on the Niagara Municipal Comprehensive Review has examined recent growth trends, the policy framework for managing growth, the suitability of the land supply, and has set the context for the development and evaluation of options for growth.

The *Regional Official Plan* is well organized with a full suite of growth management policies, targets and implementation initiatives which conform to the *Growth Plan* and other provincial policy as of 2006. The Sustainable Urban Vision and Common Objectives that support the current policy framework and growth targets remain valid and will guide the MCR work.

Previous growth management plans led to a number of implementation measures such as the extension of Highway 406 and incentives to attract businesses to the Gateway Employment Lands. These have helped prepare communities from Thorold to Welland and Port Colborne for longer term growth.

Looking ahead to this current review, the updated Schedule 3 forecasts of population and employment through Amendment 2 to the *Growth Plan* call for growth of 168,000 people and 80,000 jobs by 2041. Allocating this growth across the Region will recognize recent shifts in demographic trends, changes to the land supply and market viability.

Additional initiatives will arise from the adoption of the updated forecasts and their allocation across all twelve area municipalities in support of a shared vision for Niagara's future growth and development. Notably, a Regional Transportation Master Plan and a Master Servicing Plan will tie in with the MCR process of identifying a preferred growth option for the Region including a review and update of local population, housing and employment allocations and intensification targets.

Currently, the Region is not growing at a fast pace overall, although demand for new housing varies significantly across the Region. The decline in Ontario's manufacturing base in recent years has affected Niagara's economic prospects, although the Region

has many opportunities to enhance its economic outlook going forward. New housing demand is outpacing the net increase in population, reflecting an aging population. Similar to many communities outside of the Province's major urban centres, Niagara is experiencing the out-migration of young adults to education and employment opportunities, while some communities in the Region remain quite attractive to the in-migration of those over 60 years of age.

While population growth appears to be on track to meet the previous target of 511,000 by 2031, the recession has set back the prospects for realizing the employment target of 218,000. Council's renewed emphasis on economic development initiatives should help to improve the Region's growth outlook going forward.

Recent housing development in the Region suggests that Niagara is already meeting its *Growth Plan* intensification target, however the extent to which this meets the intent of intensification policy is less certain. The potential supply of lands for intensification is abundant and many Niagara municipalities are planning for higher densities and redevelopment within built up areas. The degree to which a shift to higher densities and the development of more compact communities is happening and will continue to occur will ultimately depend on a combination of policy, supply and market demand factors.

Single family dwellings are still the prevailing built form of new housing. While a considerable share of this production has taken place in greenfield settings outside the built up area, there continues to be sufficient greenfield opportunities to accommodate the housing needs of the current population target.

The identification of downtown St. Catharines as an Urban Growth Centre is key to achieving a sustainable urban vision, and this will be reinforced as a new urban structure strategy is pursued. Substantial institutional investment here has primed this area for future intensification and revitalization.

Niagara is a very large region. While considerable population is focused along the QEW corridor along Lake Ontario, much of the Region is quite sparsely populated. The distances and accessibility between urban centres, along with economic linkages, both internally and with the GTAH, contribute to highly differentiated land markets across the Region. The significant vacant land supply across central and southern

Niagara municipalities is not likely to be taken up in the short or medium term, but may become more viable in the longer term as demand shifts and grows. In the nearer term, demand seems to be more focused on the northern part of the Region where the supply of land for greenfield development is constrained.

Moving forward, managing growth will require acknowledging the variable demand across Niagara while looking at options to achieve the growth outlook mandated by the *Growth Plan*. A goal should be to realize an urban structure that reflects the stated core objectives of sustainability, conservation and growth of a competitive and diverse economy.

Study Next Steps

Phase Three of the MCR will involve the development of preliminary options for growth. These options will be refined through public input and each option will be assessed for impacts on regional services and the costs of development as well as their relative influence in delivering on the core objectives of the *Regional Official Plan* and supporting a shared urban vision for Niagara.

Phase Four will identify a preferred growth option and seek public and stakeholder advice on that option. As the preferred growth option is refined, detailed forecasts of population and employment for each area municipality will be prepared and vetted with the area planning staff. The implications for the boundaries of settlement areas will also be assessed and draft recommendations will be developed.

Appendix A

Niagara *Regional Official Plan* Growth Management Policy Direction

Niagara <i>Regional Official Plan</i> Growth Management Policy Direction	
Provincial Policy Area	<i>Regional Official Plan</i> Growth Management Policy Direction
Intensification	<p>Section 4.C Intensification and Greenfield Growth of the ROP sets out the Region's strategy with respect to intensification including direction to the local municipalities regarding the development of local intensification strategies including the identification of specific Intensification Areas (e.g. downtowns, intensification nodes and corridors). Section 4.C.4 establishes minimum local municipal residential intensification targets to allow achievement of an overall Regional target of 40% in conformity with the Growth Plan. In addition, detailed policies are provided in Section 4.G with respect to Urban Growth and 4.I for Mixed Use Areas which establish a sustainable urban vision and specific direction with respect to matters such as:</p> <ul style="list-style-type: none"> • Sustainable urban development; • The Region's Urban Structure; • Urban Areas; • Downtown St. Catharines Urban Growth Centre; • Local Municipally Designated Intensification Areas; and • Transportation Corridors.
Strict Limits on Settlement Area Boundary Expansions	<p>Section 4.D.1 of the ROP provides that Urban Area boundary expansions will only occur outside the Greenbelt Area and when a municipal comprehensive review is completed by the Region subject to detailed criteria.</p>
Increased Density for Greenfield Areas	<p>Section 4.C.5 of the ROP provides policy direction on the planning for designated Greenfield Areas as "compact, complete communities." Section 4.C.6 requires a minimum combined gross density target of 50 people and jobs per hectare across all Designated Greenfield Areas excluding specific non-developable features. The Region is to work with local municipalities to identify minimum local Greenfield density targets which will achieve the overall Regional target. Specific direction is also provided in Section 4.C.7 for local official plans to ensure achievement of the planning minimum greenfield density target (e.g. minimum and maximum residential and employment densities).</p>
Preservation of Employment Areas	<p>Section 4.E of the ROP establishes that municipalities may permit conversion of employment lands but only through a municipal comprehensive review which satisfies specific criteria. In addition, it is specifically noted that major retail uses are considered to be non-employment uses and are not permitted.</p>

Niagara <i>Regional Official Plan</i> Growth Management Policy Direction	
Provincial Policy Area	<i>Regional Official Plan</i> Growth Management Policy Direction
Recognition of a Gateway Economic Zone and Gateway Economic Centre within Niagara	Section 3.A of the ROP provides detailed policies with respect to the Niagara Economic Gateway including the Gateway Economic Centre. The policies establish the locations, which are depicted on Schedules G1 and G2; The Vision; Objectives; and specific policies related to issues such as Strategic Areas for Investment; the major office function of the St. Catharines Urban Growth Centre; the concepts for various components of the Gateway (e.g. Brock Business Park, Highway 406 Economic Gateway); the role of intensification in existing occupied employment lands and the approach to implementation including a Gateway specific Community Improvement Plan and the potential to use a Development Permit By-law.
Infrastructure investments support the Growth Plan	Chapter 8, Infrastructure, of the ROP provides detailed policies with respect to infrastructure including water and wastewater systems, solid waste, utilities, and energy. Policies related to transportation are found in Chapter 9 including transit, active transportation and goods movement. A key objective of Chapter 8 is to “provide a framework and policy linkages for the coordination of infrastructure planning, land use planning, and infrastructure investment to implement this Plan.” (Objective 8.A.1)
Natural Systems, Prime Agricultural Areas and Mineral Aggregate Resources are protected	The ROP provides detailed policies with respect to natural systems in Chapter 7 Natural Environment; with respect to prime agricultural areas in Chapter 5 Rural & Agricultural and with respect to mineral aggregate resources in Chapter 6, Resources.
A Culture of Conservation	Policies with respect to conservation are found throughout the ROP. These include Section 4.G.3 Sustainable Urban Development; Section 7.A.3 Air Quality and Climate Change; Section 4.J Urban Design and the Public Realm; and Section 7.C.3 Supporting Stewardship. In addition, Section 9 promotes sustainable transportation including transportation systems designed to accommodate all modes of travel and transit as a first priority for transportation infrastructure planning.

Appendix B

Niagara Region Area Municipal Growth Management Policy Direction

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
St Catharines New Official Plan approved July 31, 2012	<p>The new Official Plan (OP) addresses the key applicable Provincial and Regional Growth Management directions. In particular, Section 2.3, Managing Growth and Change, establishes a detailed growth management strategy including:</p> <ul style="list-style-type: none"> • an intensification target of 95% and no provision for expansion of the existing Urban Area; • detailed policies with respect to intensification in Downtown St. Catharines, the Region's only Urban Growth Centre; and, • identification of specific Intensification Areas on Schedule 'D' Municipal Structure (See attached Exhibit A-1) which are planned to support minimum housing densities higher than surrounding areas together with a mix of other uses to serve the local area neighbourhood; • general policies with respect to housing intensification on all Local Neighbourhood Convenience Commercial, Major Commercial and Community Commercial Centres and all designated Residential and Mixed Use properties subject to the policies and density standards set out in Part D, Section 8 and 12 of the Plan. <p>Other related policy directions include urban design (Section 4), alternative forms of transportation and parking (Sections 5.3 and 5.4), sustainability (Section 6), mixed use (Section 12) and natural areas (Section 13.2).</p>
Niagara Falls Growth Plan Conformity (OPA 94) Approved January 27, 2014 Environmental Policies (OPA 96) Adopted 2010 Approved October 2014 Morrison/Dorchester Node (OPA 113) Approved 2013	<p>OPA 94 introduced to the City's OP detailed policies with respect to growth management including growth objectives that include a 40% minimum residential intensification target annually in the Built-Up Area (Schedule A2) (See attached Exhibit A-2) and the development of Greenfield Areas (Schedule A2) as compact complete communities. In addition, OPA 94 includes policy direction related to:</p> <ul style="list-style-type: none"> • Intensification Nodes and Corridors (Part 1, Section 2 and Section 3); • redevelopment in the Residential designation including the Built-Up and residential development in Greenfield Areas (Part 2, Section 1); • introduction of permission for mixed use development and residential intensification in commercial areas (Part 2, Section 3);

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
	<ul style="list-style-type: none"> • promotion of infilling and redevelopment in industrial districts in the Built-up Area and progressive development in the Greenfield Area; • municipal infrastructure and phasing of growth (Part 3, Section 1); • urban design (Part 3, Section 5); and, • urban boundary expansion, employment land conversions (Part 4, Section 2).
Grimsby New OP approved May 12, 2012	<p>The new Official Plan (OP) addresses the key applicable Provincial and Regional Growth Management directions. In particular, Section 2.3 Municipal Structure Elements identifies two Major Intensification Areas – Downtown and the Winston/Casablanca node, as shown on Schedule A (See Exhibit A-3). The policies of Winston/Casablanca are found in the Winston Secondary Plan in Section 11.</p> <p>Section 2.4, Growth Management, establishes a detailed growth management strategy including:</p> <ul style="list-style-type: none"> • a density target for designated greenfield areas of an average gross density target of 50 jobs and persons per gross hectare (Section 2.4.3); • an intensification target of 80% of new dwelling units (Section 2.4.4); • an Intensification Strategy which directs the majority of intensification to the two major intensification areas and provision for development incentives for intensification; • criteria for undertaking 5 year Growth Management Study (Section 2.4.9); and, • criteria for undertaking a Settlement Boundary Expansion Study (Section 2.4.10). <p>Other related policy directions include parking and alternative forms of transportation and (Sections 5.5 and 5.6), environmental management and sustainability (Section 4), residential/mixed use policies (Section 3.4.5) streetscape design (Section 7) and design policies throughout the Plan related to specific land uses; and natural environment (Section 3.1).</p>
Fort Erie New OP approved November 18, 2011	<p>The new Official Plan (OP) addresses the key applicable Provincial and Regional Growth Management directions throughout the Plan. In particular, the Plan:</p>

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
(Several appeals outstanding)	<ul style="list-style-type: none"> • sets out the criteria for urban boundary expansion (in Section 3.5 IV); • provides general direction on the phasing of residential development and the approach to residential intensification (Sections 4.7.1 and 4.7.4); • includes policies on Core Mixed use (Section 4.8); and, • includes a detailed Gateway Secondary Plan (Section 4.16). <p>Other related policy directions include urban form and housing (Section 5), natural heritage (Section 8), sustainability (Section 9), and active transportation and transit (Section 12.10 and 12.12).</p>
Port Colborne New OP approved November 25, 2013	<p>The new Official Plan (OP) addresses the key applicable Provincial and Regional Growth Management directions. In particular, Section 2.2, Growth Management Strategy, establishes general growth management directions such as supporting infill and intensification and compact and transit supportive development. More detailed direction is provided throughout the Plan and in Section 2.4, Strategic Planning Directions in particular which establishes the projected population and employment forecasts (Sections 2.4.1 and 2.4.5) and general directions with respect to matters such as:</p> <ul style="list-style-type: none"> • housing (Section 2.4.2); • intensification and infill including an intensification target of 15% (Section 2.4.3) and direction to encourage intensification within local intensification areas including the Downtown and Main Street West Development; • development of greenfield lands including support for the Region's target of 50 people and jobs per gross hectare(Section 2.4.4); • employment land conversion (Section 2.4.5); • general built form/landscape design guidelines (Section 2.4.8); and, • energy conservation and climate change (Section 2.4.9). <p>Other related policy directions include urban area boundary (Section 3.1.1); specific direction related to intensification and infill, where applicable, and design for each land use</p>

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
	designation (Section 3); Niagara to GTA Corridor Special Study Area (Section 3.15.1); natural heritage (Section 4); and active transportation and transit (Section 9.1.1).
Welland Approved in part September 15, 2011 (One appeal and two deferrals outstanding)	<p>The new Official Plan (OP) addresses the key applicable Provincial and Regional Growth Management directions. In particular, Section 3, Growth Management, sets out a detailed growth management strategy including population, housing, housing distribution and employment forecasts (Sections 3.3) and direction related to:</p> <ul style="list-style-type: none"> • City structure including the Urban Boundary, built boundary and greenfield areas (Sections 3.4.1, 3.4.2 and 3.4.3) and identified Intensification Areas on Schedule A (See Exhibit A-4); • intensification and brownfield development including an intensification target of 40% and a related strategy to achieve same (Section 3.4.4); • greenfield development including a density target of 50 residents and jobs combined per gross hectare and a related strategy to achieve same (Section 3.4.5); and, • urban boundary expansion (Section 3.5). <p>Other related policy directions include Downtown Welland (Section 4.1); housing and residential which includes a range of policies which encourage intensification including limits on the conversion of High Density Residential sites, direction with respect to intensification and infill, policies for accessory units and garden suites, and design (Section 4.2); employment areas including policies for the Gateway Economic Centre designation and employment land conversion (Section 4.3); environment including the natural heritage system (Section 6.1); transportation including transit and active transportation (Section 6.4) and infrastructure (Section 6.5).</p>
Thorold New Official Plan adopted April 21, 2015	The new Official Plan is designed to implement the key applicable Provincial and Regional Growth Management directions. It includes in particular in Section A5, Concepts Guiding Future Development in Urban Areas, policies related to urban area boundaries, the built-up area, greenfield areas, intensification target, intensification corridors (Front Street, Ormond Street, Pine Street, Clairmont Street and St. David's Road in and adjacent to Downtown), phasing, urban area expansion and the Gateway Economic Centre. It also includes

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
	detailed direction with respect to intensification in the Urban Living Area in Section B1.1.3, Residential Intensification. Section B1.2.4.1 Residential and Mixed Use Intensification also provides direction with respect to development in the Downtown.
Lincoln Adopted 1990 and subject to various approvals between December 18, 1992 and January 16, 1996 by the Province	The Town of Lincoln has not updated the Official Plan to bring it into conformity with current Provincial policies or the ROP.
Pelham Approved March 11, 2014	<p>The new Official Plan addresses the key applicable Provincial and Regional Growth Management directions. In particular, Section A3, Settlement Area Strategy includes population, housing and employment forecasts. It indicates that the majority of new development will occur through the East Fonthill Secondary Plan but also indicates that some additional development will through the North West Fonthill Secondary Plan and in Fenwick.</p> <p>Section A5, Concepts Guiding Future Development In Urban Areas provides direction with respect to key growth management issues including:</p> <ul style="list-style-type: none"> • a Greenfield density target of a minimum of 50 people and jobs per hectare (Section A5.3), • an intensification target; an intensification target of 300 new units (Section A5.4); • the identification of intensification corridors along major roads (Section A5.5); • a phasing strategy (Section A5.6); and, • criteria for proposed urban area expansions (Section A5.7). <p>Additional direction with respect to growth management is found in the Urban Area designations in Section B1, including Section B1.1.3 Residential Intensification and Section B1.2.4.1, Downtown Residential and Mixed Use Intensification. In addition, the policies for North West and East Fonthill Secondary Plans (Section B1.6 and B1.7) and the Greenfield Overlay policies (Section B1.8) are designed to require the creation of a more compact urban form including the</p>

Growth Management Framework Local Official Plans	
Municipality	Summary Growth Management Directions
	establishment of minimum density targets (Sections B1.7.2, B1.7.7.2, B1.8).
West Lincoln Adopted 2010 OPA 38 Growth Plan Conformity Approved 2014	<p>The new Official Plan (OP) has been designed to address the key applicable Provincial and Regional Growth Management directions. The key growth management policies are found in Section 5, Growth Management and Section 6, Urban Settlement Area (Smithville) which were adopted through OPA 38. In particular, Section 5 contains:</p> <ul style="list-style-type: none"> • population, employment and housing forecasts (Sections 5.3, 5.4 and 5.5); • directions with respect to the urban settlement structure including a greenfield density target of 50 persons and jobs per hectare (Section 5.6); • criteria of settlement area expansion (Section 5.7); • policies with respect to the monitoring and management of land supply (Section 5.9); • intensification strategy (Section 5.10); and, • greenfield strategy (Section 5.11).
Niagara-on-the-Lake Adopted 1994 5 year review initiated 2014 Release of draft Official Plan anticipated December 2015	The Town is in the process of updating their Official Plan to bring it into conformity with current Provincial policies and the ROP. A Draft Final Plan is anticipated to be available for public review in December 2015.
Wainfleet Approved August 14, 2014	<p>The new OP “implements the policies and Plans of the Province of Ontario and the Niagara Region Policy Plan” (Section 1.1). It includes:</p> <ul style="list-style-type: none"> • the population, household and employment forecast to 2031 (Table 1 Section 1.3); • direction related to the municipal structure including the Countryside, Hamlets, Lakeshore Area and Natural Heritage System including direction related to hamlet boundary expansion and intensification (Section 2); • direction with respect to environmental management including sustainability and energy conservation (Section 4); and, • infrastructure and roads, as well as active transportation (Section 5).

Appendix C

Niagara Region Land Supply Methodology Document

Niagara 2041: How We Grow Region of Niagara Land Supply Methodology

Overview

The Niagara Region land supply methodology quantifies vacant residential and employment land within Niagara and further identifies potential redevelopment opportunities. Initially adopted by Regional Council and reviewed by local municipalities in 2013, the first iteration of the analysis identified a base vacant land supply for the Region for the year 2011. Since the first draft of the supply was complete, annual updates have been taken to track changes across Niagara.

As a component of the Municipal Comprehensive Review (How We Grow) the Region, in consultation with Hemson Consulting, have undertaken a thorough review of the land supply method and data. The updated land budget was reviewed by local municipalities to confirm the information is accurate and complete prior to the identification of Growth Options (Phase 3 of the MCR).

The purpose of this document is to provide context around the *gross land supply* methodology and explain how the supply has been maintained and updated.

Vacant Land Supply Methodology

Study Area

Niagara Region is made up of 27 Urban Settlement Areas and 30 hamlets across 12 municipalities. For the purposes of the land supply work, only Urban Settlement Areas have been analyzed as urban areas are to be the primary location of all future growth within the Niagara Region as per the Growth Plan for the Greater Golden Horseshoe (Growth Plan).

Settlement Areas can be further broken down into two categories:

1. Built-up Area
2. Designated Greenfield Area

The Built-up Area was defined by the Ministry of Infrastructure in 2008. All lands with development potential within the Built-up Area are considered intensification opportunities as per the Growth Plan, and their development counts towards municipal intensification targets.

The lands outside the Built Boundary, but within the Settlement Area Boundary, are Designated Greenfield Areas (DGA). The DGA has specific policies and targets assigned from the Province (found under Policy 2.2.8 in the Growth Plan).

Total, Gross and Net Land Supply

The Niagara Region defines *total land supply* as the summation of the Settlement Areas (including all properties, environmental features, roads, etc.).

Gross land supply is the summation of developable land within the Settlement Areas. Gross Land Supply is meant to represent quantify land that is free from any constraints and is available for development.

Net land supply is a fraction of the gross land supply, used to account for infrastructure and long-term vacancy considerations.

Identifying Gross Vacant Land Supply and Non-Developable Features

In determining *Gross Vacant Land Supply*, property boundary/parcel fabric from Teranet was used as the base data for identifying individual properties within the Settlement Area. With the parcel layer, developed and developable

properties were identified through a series of spatial analysis techniques. Determining the dimensions that make a property developable is not straight-forward and is impacted by the presence of environmental features, archaeological resources, existing development and the location of the property.

The first step used to identify developable parcels. Properties with a structure/building on site with lot coverage of more than 5% in the Greenfield Area were removed and categorized as *developed*. Within the Built-Up Area, all parcels containing a structure were removed. The 5% threshold was established based on analysis of Greenfield properties that had structures on site but also a significant amount of available land. A test of properties exhibiting 5%, 7.5% and 10% lot coverage was completed and properties with 5% or less coverage more accurately represented parcels that could be realistically severed and/or developed. The 5% test is simply a flag, used to identify land for further review. Some land identified using this flag was later removed, while other land was brought into the land supply.

After identification of vacant parcels all Non-Developable Features (NDF's), including required setbacks (defined in the Regional Official Plan), were removed from developable parcels. Linear infrastructure, such as hydro corridors, railways, Provincial highways and the Welland Canal were also removed, as these features will not be developed due to their function and/or Provincial and Federal protection. Federally held lands (specifically along the Welland Canal), cemeteries and parks were not included as developable land. Table 1 below includes a breakdown of all features and associated setbacks.

Table 1: Land Supply Take Outs and Setbacks

Feature	Setback	Data Source
Linear Features		
Hydro Corridor	Property Line	MPAC Property Code
Railway	30 m	MPAC Property Code
Provincial Highway	18 m	MPAC Property Code
Welland Canal	Property Line	MPAC Property Code
Federal Lands	Property Line	MPAC Property Code
Environmental Features		
Wetlands	30 m	MNR
Coastal Wetlands	30 m	MNR
Significant Woodlands	15 m	NPCA
Significant Valley Lands	7.5 m	NPCA
Areas of Natural and Scientific Interest	Feature Boundary	MNR
Habitat of Endangered Species and Threatened Species	Feature Boundary	MNR
Significant Wildlife Habitat	Feature Boundary	NPCA
Fish Habitat	Critical 30 m Important 15 m Marginal 15 m	NPCA
Floodplain Areas	5 m	NPCA
Other Features		
Parks	Property Line	MPAC
Cemeteries	Property Line	MPAC
Storm water Management Ponds	Property Line	MPAC
Pedestrian Walkways	Property Line	MPAC

On a parcel by parcel basis, the removal of non-developable features may discount a minimal amount of land area in some cases, and almost the entire parcel in others. Non-developable features may change over time and boundaries may be redrawn or deemed developable through an Environmental Impact Study (additional details on

this in Tracking Supply). The most up-to-date natural heritage feature mapping and plans of subdivision were used to identify non-developable features for the 2011 base analysis.

Constraints

During the Gross Land Supply review, some parcels of vacant land were identified where development potential was believed to be constrained. *Constrained lands* represent a portion of the region-wide vacant land supply that is not anticipated be developed before the 2031 and 2041 planning horizons. Constraints identified include:

- Parcel Fragmentation
- Archaeological Resources
- Lands Use Buffers
- Environmental Contamination

Less than 100 hectares of constrained lands were identified across the Region and subsequently removed from land supply.

Categorizing Supply

Following the removal of NDF's, the developable vacant land supply data was categorized into the following categories:

- Greenfield Residential Supply
- Greenfield Employment Supply
- Built Boundary Residential Supply
- Built Boundary Employment Supply

Developable land was analyzed against Local Official Plans to determine the proposed use of the property for categorizing. Residential supply is made up of all density types (low, medium, high, etc.). Employment includes Industrial, Commercial and Institutional (ICI), as well as mixed land uses.

Intensification

Local Municipalities in Niagara that have identified intensification areas within Local Official Plans are proactively focusing on redeveloping or intensifying existing development, typically in downtown cores. These areas, however, have not been included in the land supply work as these areas tend to be developed and timing of redevelopment is not known. Any development or redevelopment occurring within the Built-up Area counts towards municipal intensification targets (which is 40% across Niagara).

Alternatively, municipalities that track specific redevelopment opportunities and applications (including St. Catharines and Niagara Falls), have been included in the land supply as redevelopment opportunities. Through Phase 1 and 2 of the MCR, timing has been applied to these properties.

Consultation with Local Municipalities

Numerous consultations have been held with municipal staff, working in an iterative process to confirm land supply and account for nuances and pending planning applications (Official Plan Amendments, building permits, etc.). A total of **3** rounds of consultation have been held since 2013 to confirm land supply is accurate and respond to changes since the initial inventory was established.

Tracking Supply

Since the initial 2013 land supply work was complete, the land supply inventory has been updated annually to account for development and technical updates. Building permits issued by municipalities for new residential and employment developments are identified and removed from the land supply. This process is also used to track intensification rates and proximate land absorption.

Technical updates are also undertaken each year by reviewing changes to draft plans of subdivision, registered plans of subdivision and updates from Teranet and MPAC. Where a registered plan of subdivision has been included in the Teranet parcel fabric, the previous geometry is replaced with the more accurate Teranet mapping. The majority of these cases help refine the impact of environmental features and lead to a net gain in land supply. Figure 1 below shows how previously identified constrained lands (red) are brought back into the total supply.



Figure 1: Previous NDF (red) added back to Land Supply (green)

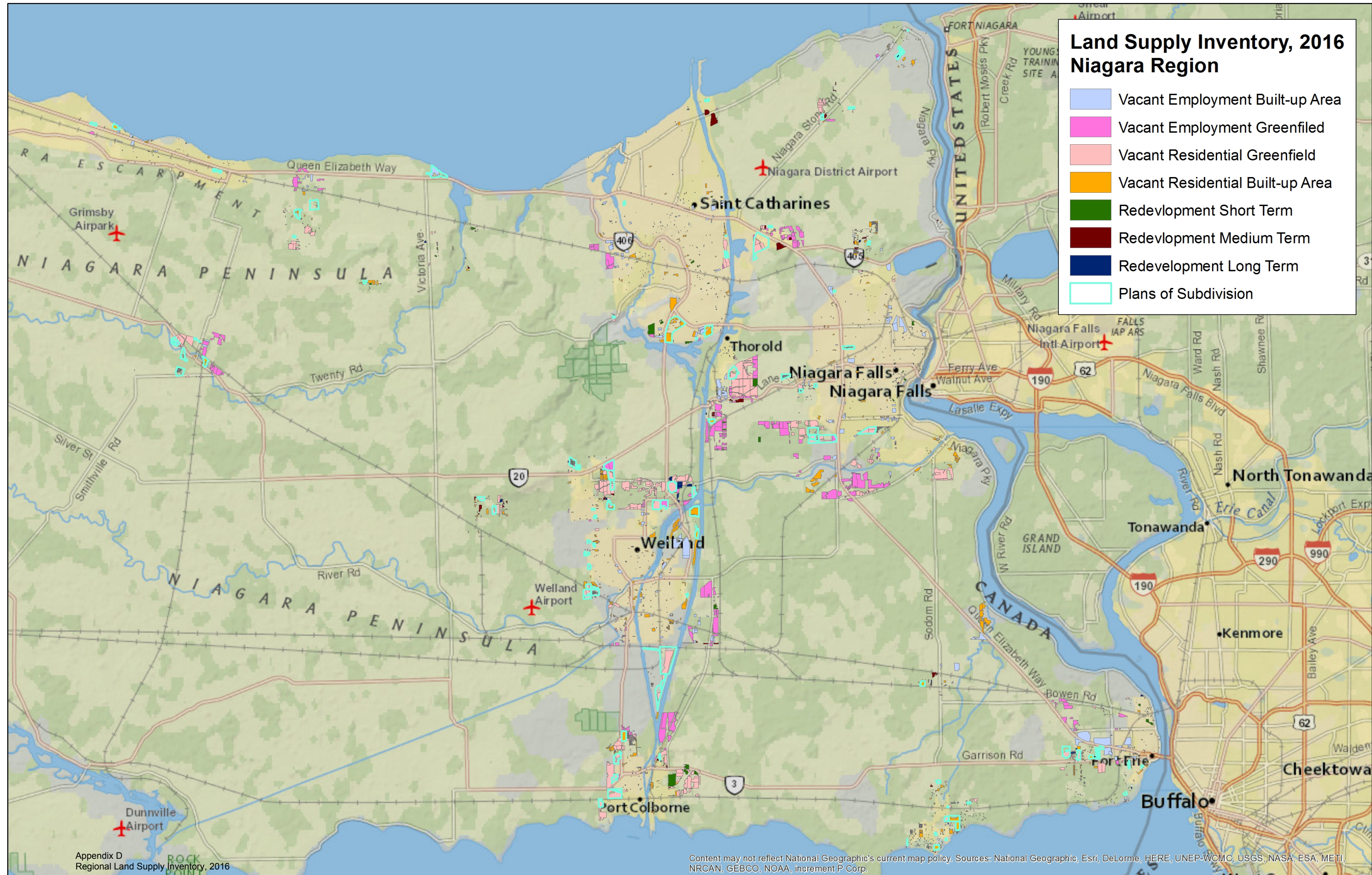
Appendix D

Niagara Region Land Supply Inventory – Figures and Mapping

Regional Land Supply Inventory (Gross ha) Niagara Region, 2016										
Municipality	Residential				Employment		Redevelopment			Total
	Built Up Area		Designated Greenfield Area		Built-Up Area	Designated Greenfield Area	Short/Medium Term 2021-2031	Medium/Long Term 2031-2041	Longer term Post 2041	
	Planned	Unplanned	Planned	Unplanned						
Fort Erie	19	156	20	69	144	46	10	6	11	482
Grimsby	10	5	3	0	15	6	3	1	0	44
Lincoln	5	17	0	39	30	31	7	2	1	133
Niagara Falls	5	85	59	177	130	239	11	3	-	708
Niagara-on-the-Lake	6	43	36	33	7	74	2	27	6	234
Pelham	7	30	43	83	0	25	1	12	5	206
Port Colborne	13	36	59	208	4	104	39	4	0	466
St. Catharines	5	60	-	31	48	47	5	25	-	221
Thorold	65	12	70	322	57	184	39	12	25	786
Welland	26	92	99	20	112	103	4	4	0	461
West Lincoln	8	3	11	42	5	59	-	-	-	127
Niagara Region	169	537	401	1,024	552	919	121	96	49	3,868

Land Supply Inventory, 2016 Niagara Region

- Vacant Employment Built-up Area
- Vacant Employment Greenfiled
- Vacant Residential Greenfield
- Vacant Residential Built-up Area
- Redevelopment Short Term
- Redevelopment Medium Term
- Redevelopment Long Term
- Plans of Subdivision

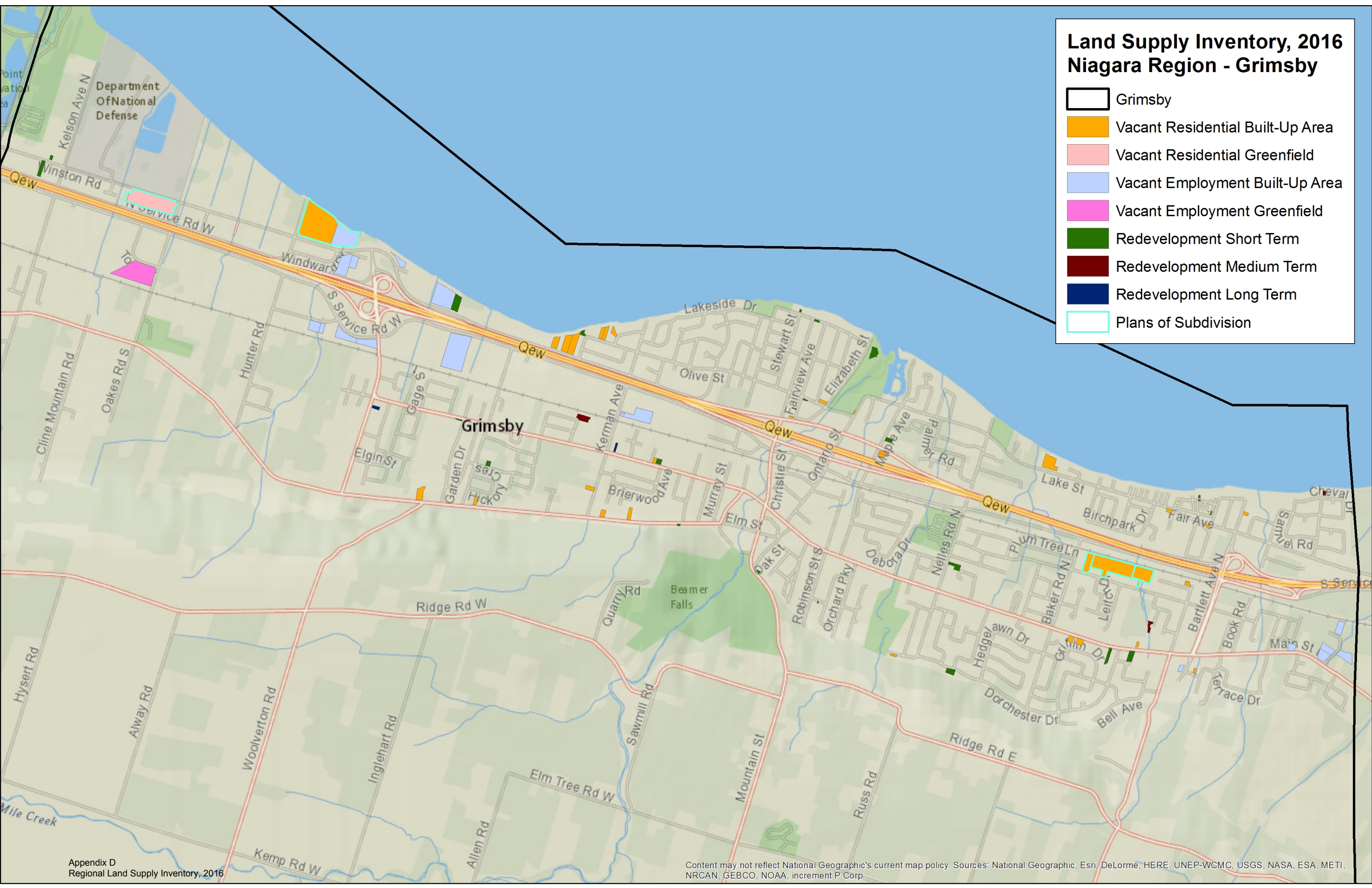


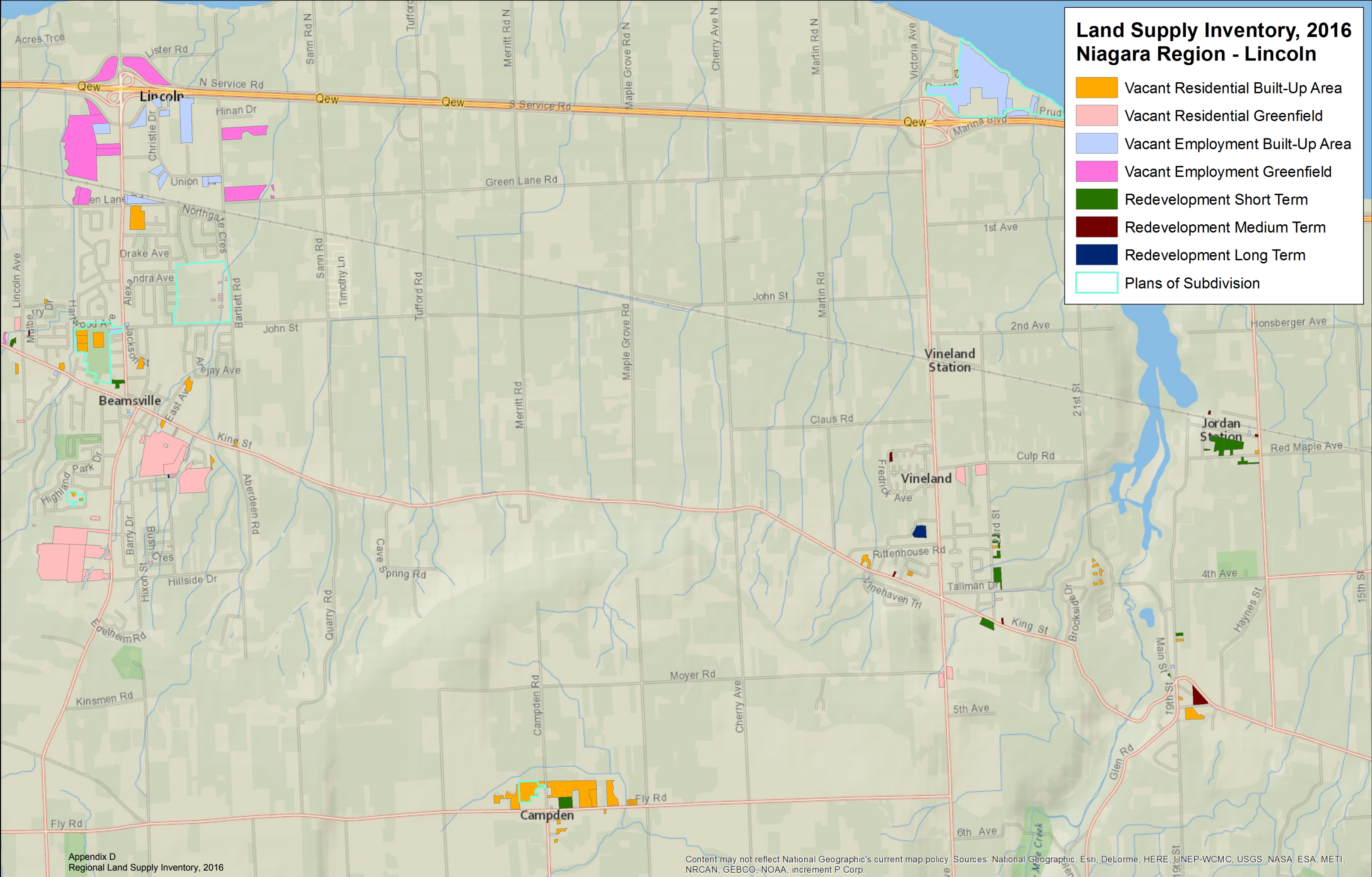
Land Supply Inventory, 2016 Niagara Region - Fort Erie

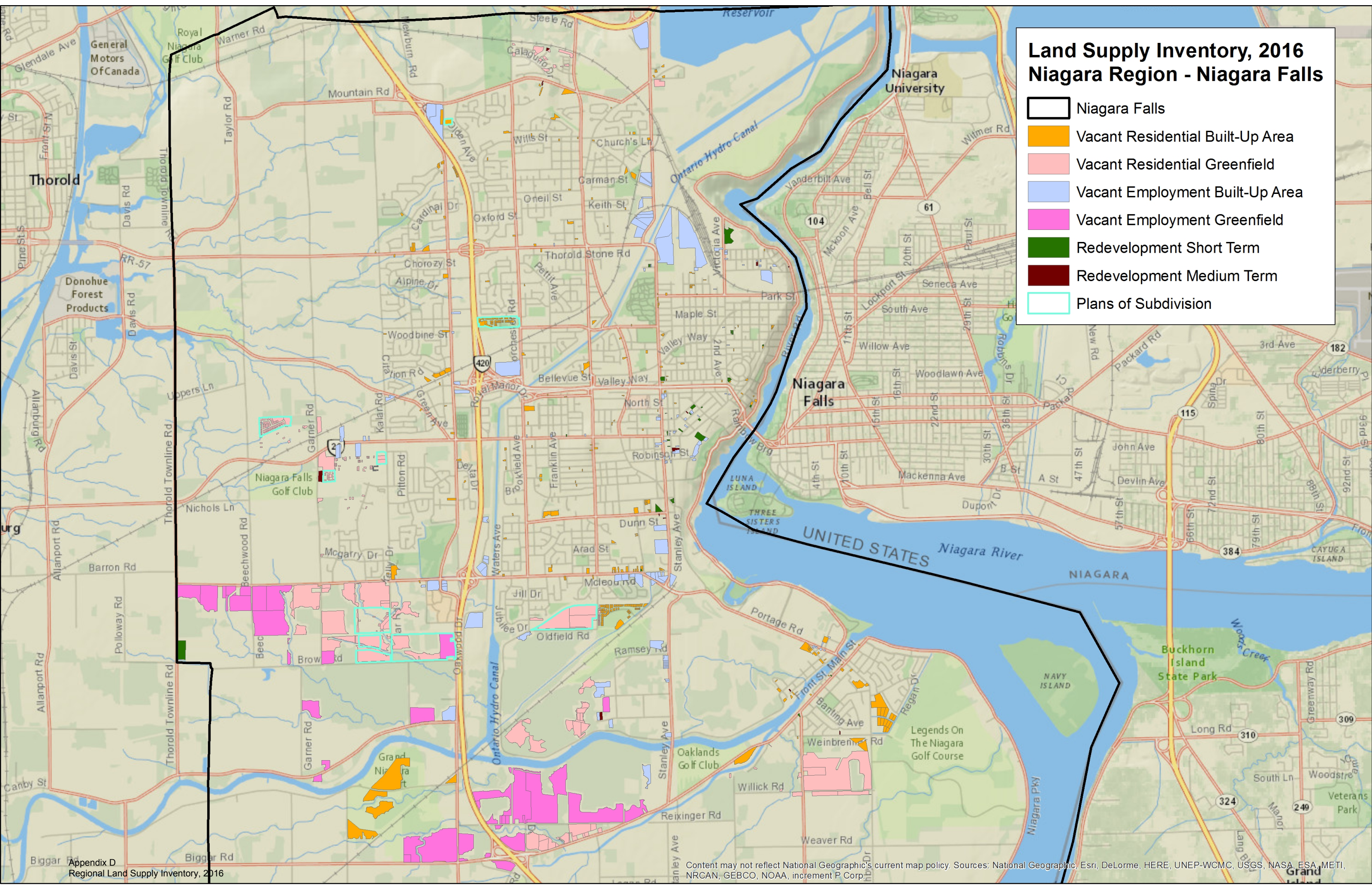
- Fort Erie
- Vacant Employment Built-up Area
- Vacant Employment Greenfiled
- Vacant Residential Built-up Area
- Vacant Residential Greenfield
- Redevelopment Short Term
- Redevelopment Medium Term
- Redevelopment Long Term
- Plans of Subdivision

Land Supply Inventory, 2016 Niagara Region - Grimsby

- Grimsby
- Vacant Residential Built-Up Area
- Vacant Residential Greenfield
- Vacant Employment Built-Up Area
- Vacant Employment Greenfield
- Redevelopment Short Term
- Redevelopment Medium Term
- Redevelopment Long Term
- Plans of Subdivision





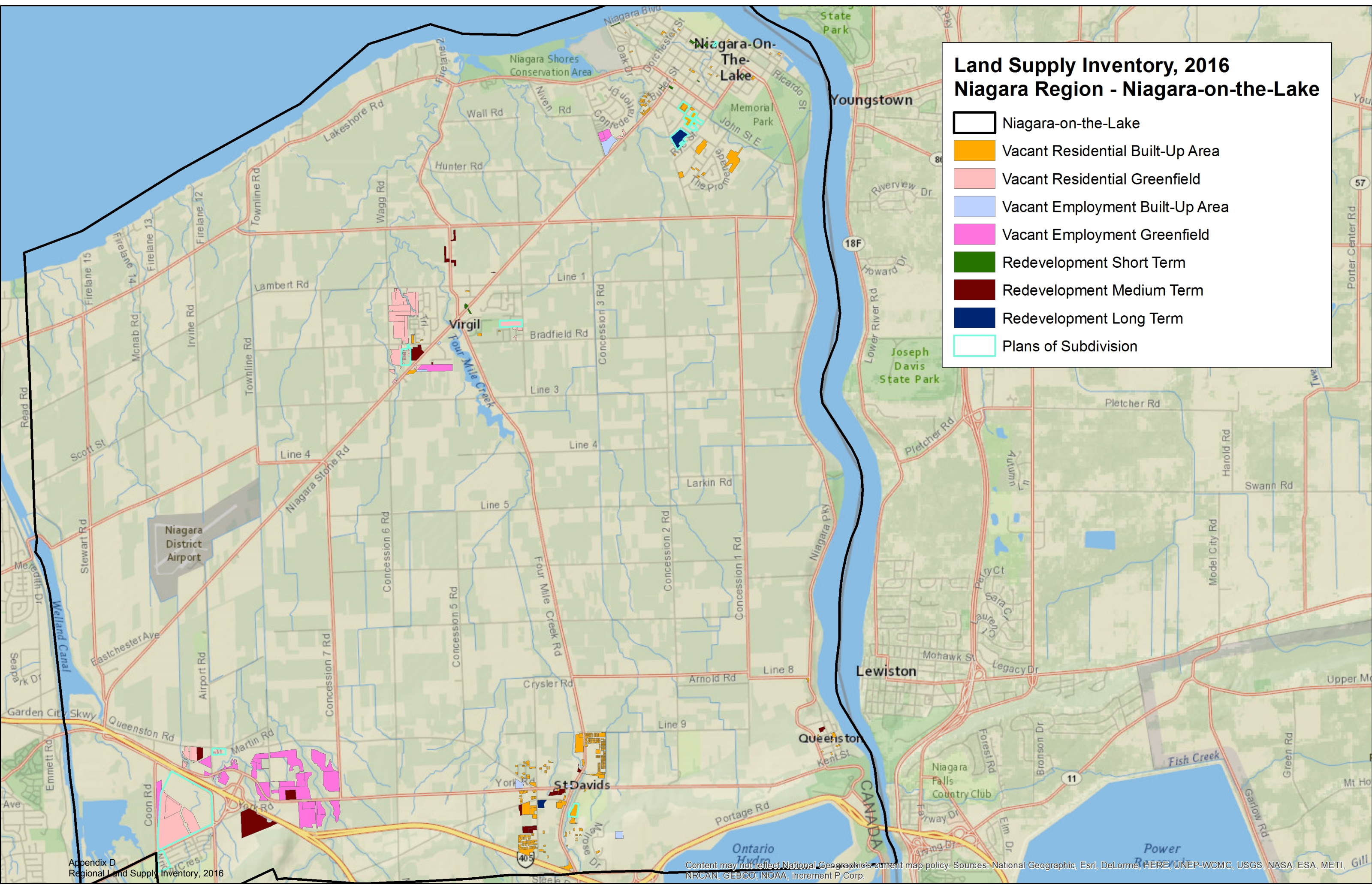


**Land Supply Inventory, 2016
Niagara Region - Niagara Falls**










-  Niagara Falls
-  Vacant Residential Built-Up Area
-  Vacant Residential Greenfield
-  Vacant Employment Built-Up Area
-  Vacant Employment Greenfield
-  Redevelopment Short Term
-  Redevelopment Medium Term
-  Plans of Subdivision

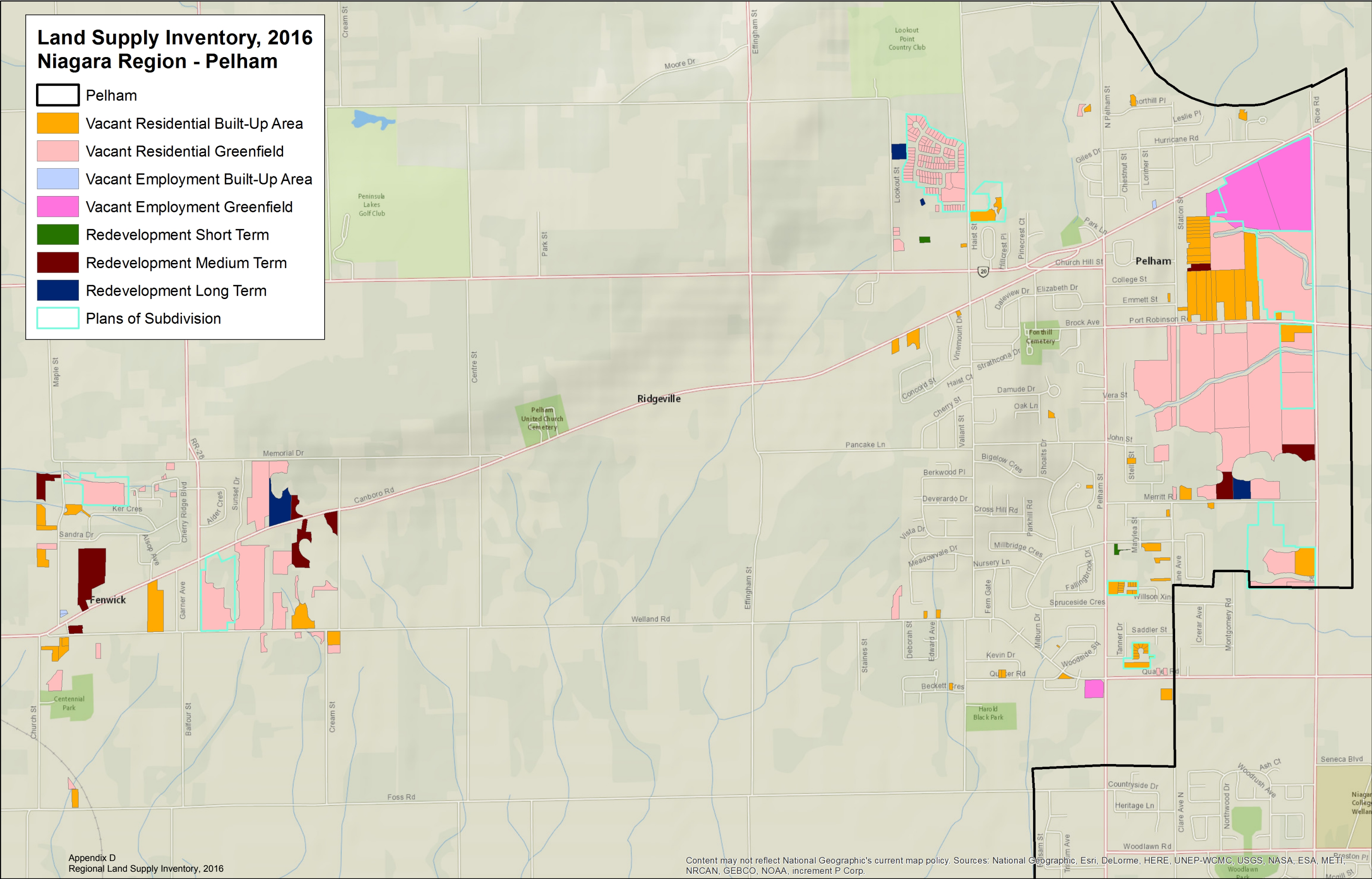
Land Supply Inventory, 2016 Niagara Region - Niagara-on-the-Lake

- Niagara-on-the-Lake
- Vacant Residential Built-Up Area
- Vacant Residential Greenfield
- Vacant Employment Built-Up Area
- Vacant Employment Greenfield
- Redevelopment Short Term
- Redevelopment Medium Term
- Redevelopment Long Term
- Plans of Subdivision












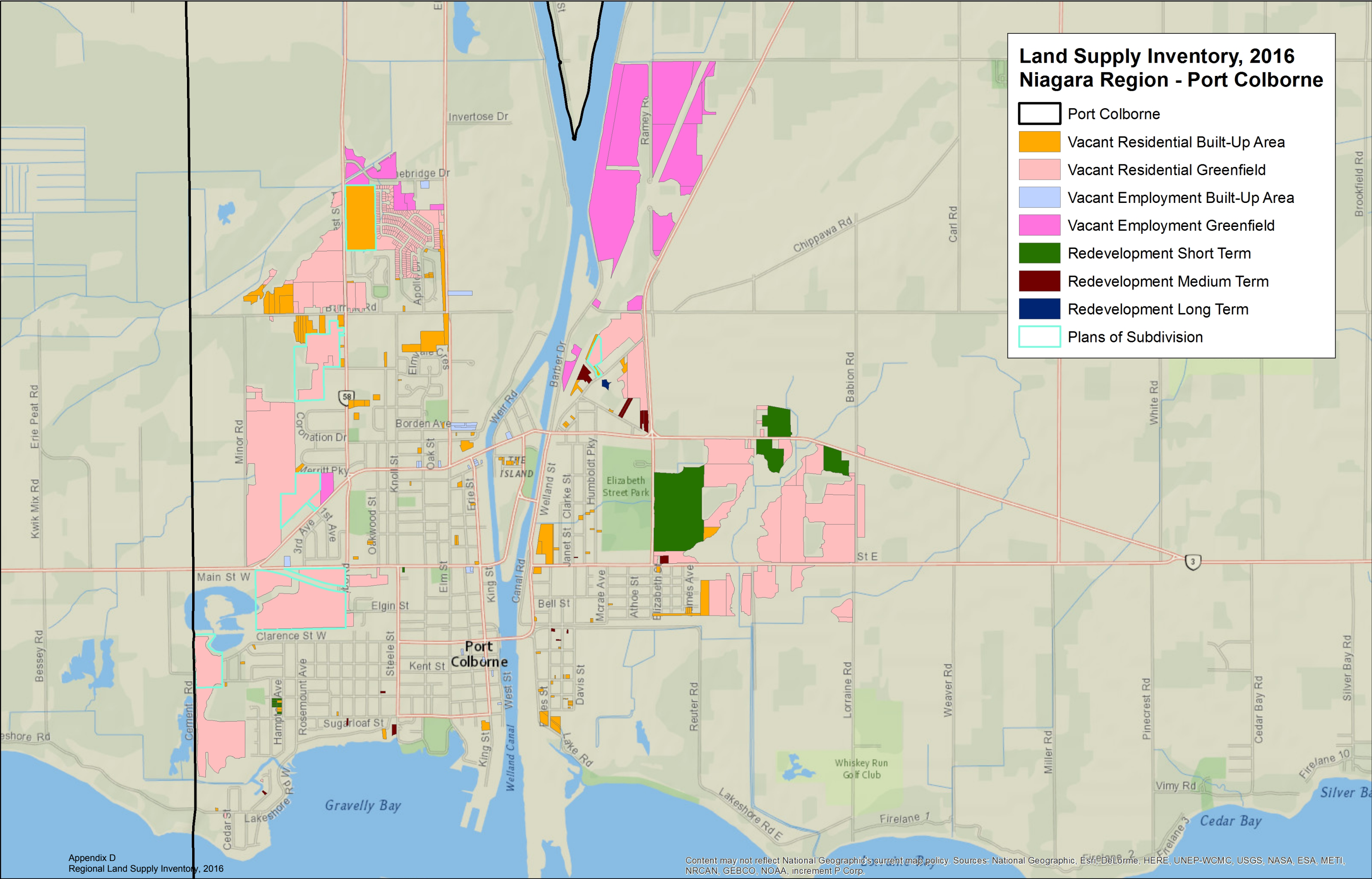
Land Supply Inventory, 2016
Niagara Region - Pelham

-  Pelham
-  Vacant Residential Built-Up Area
-  Vacant Residential Greenfield
-  Vacant Employment Built-Up Area
-  Vacant Employment Greenfield
-  Redevelopment Short Term
-  Redevelopment Medium Term
-  Redevelopment Long Term
-  Plans of Subdivision



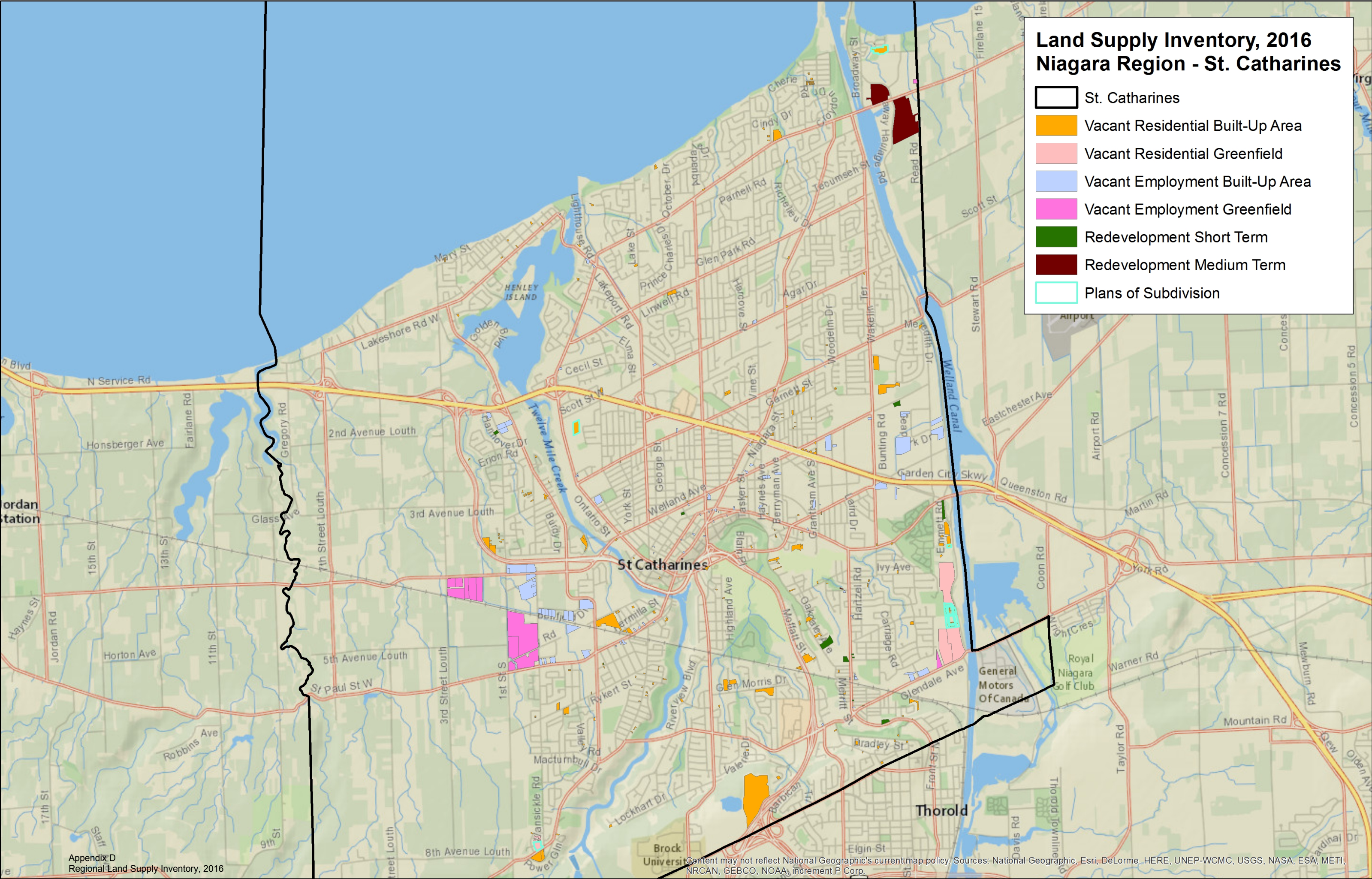
**Land Supply Inventory, 2016
Niagara Region - Port Colborne**

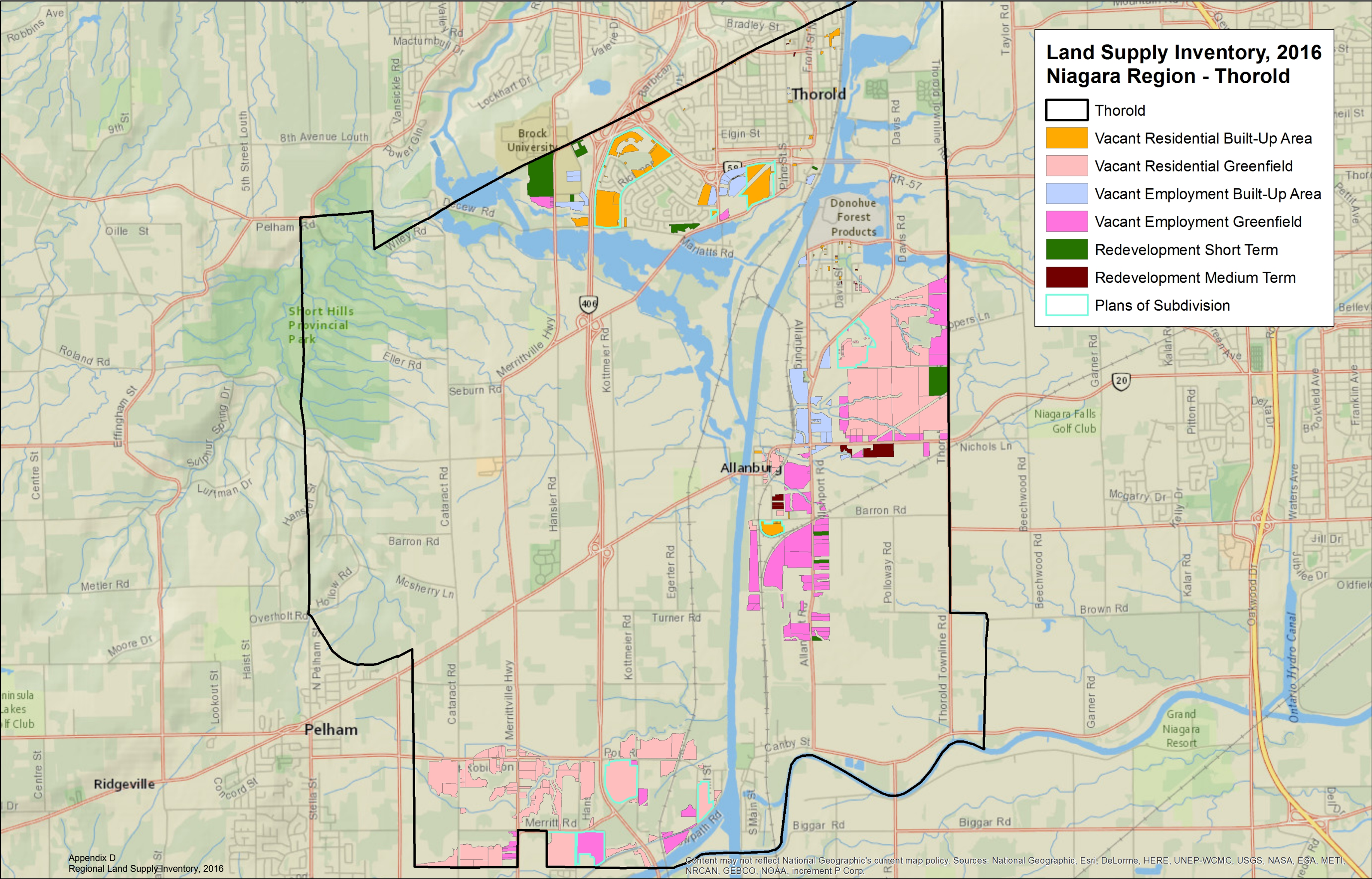
-  Port Colborne
-  Vacant Residential Built-Up Area
-  Vacant Residential Greenfield
-  Vacant Employment Built-Up Area
-  Vacant Employment Greenfield
-  Redevelopment Short Term
-  Redevelopment Medium Term
-  Redevelopment Long Term
-  Plans of Subdivision



Land Supply Inventory, 2016 Niagara Region - St. Catharines

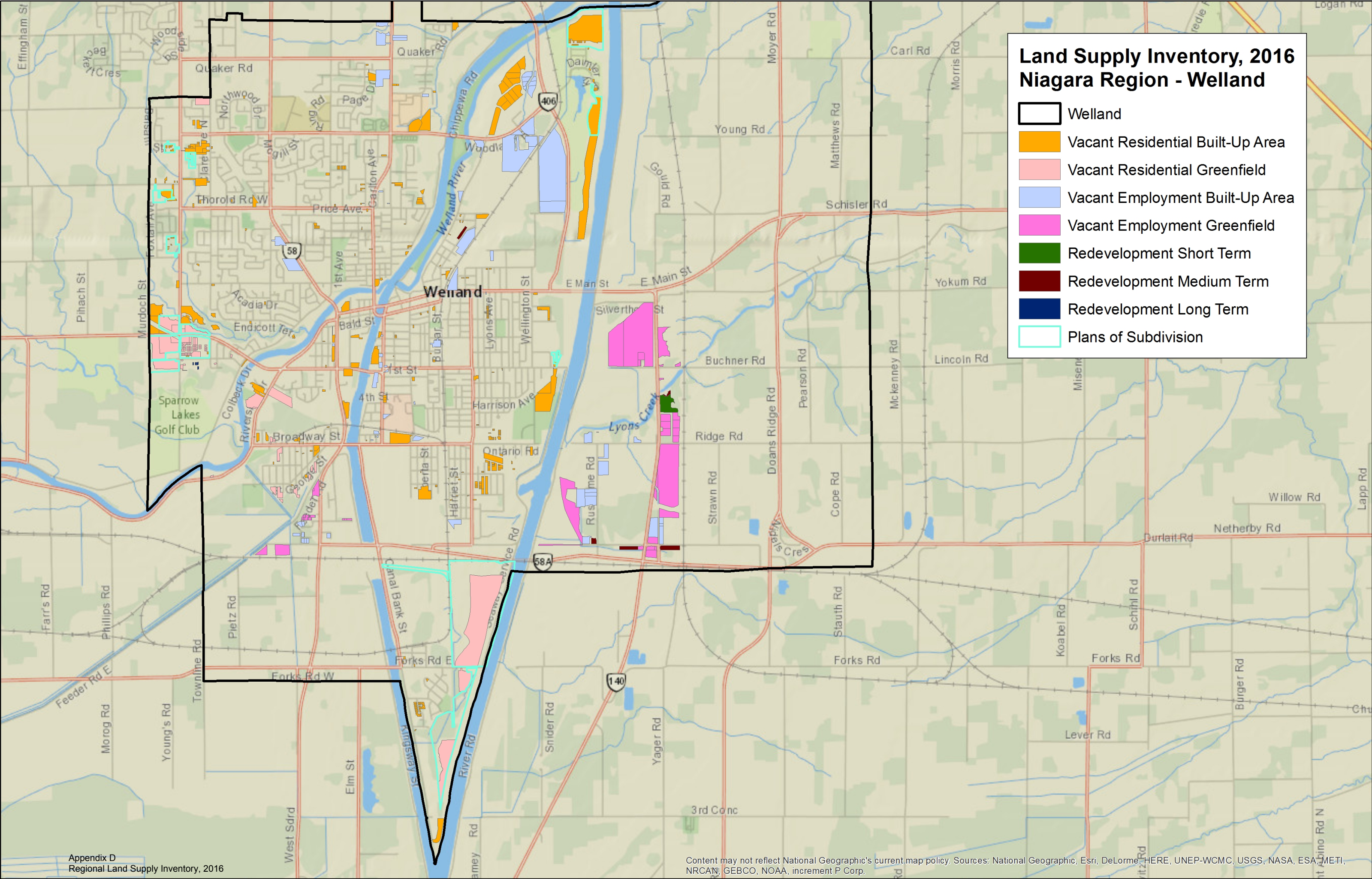
- St. Catharines
- Vacant Residential Built-Up Area
- Vacant Residential Greenfield
- Vacant Employment Built-Up Area
- Vacant Employment Greenfield
- Redevelopment Short Term
- Redevelopment Medium Term
- Plans of Subdivision





Land Supply Inventory, 2016 Niagara Region - Thorold

	Thorold
	Vacant Residential Built-Up Area
	Vacant Residential Greenfield
	Vacant Employment Built-Up Area
	Vacant Employment Greenfield
	Redevelopment Short Term
	Redevelopment Medium Term
	Plans of Subdivision

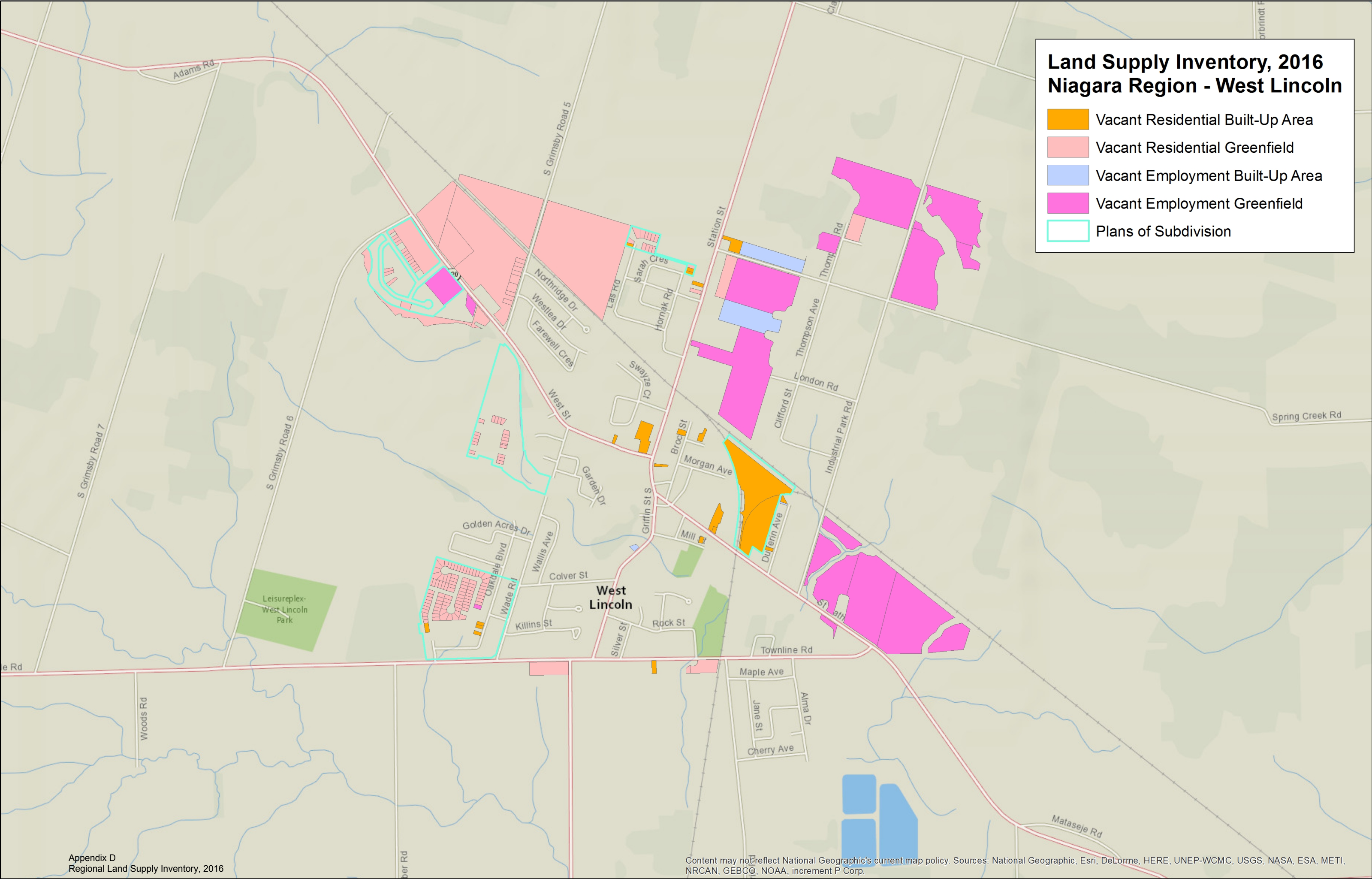


Land Supply Inventory, 2016 Niagara Region - Welland

	Welland
	Vacant Residential Built-Up Area
	Vacant Residential Greenfield
	Vacant Employment Built-Up Area
	Vacant Employment Greenfield
	Redevelopment Short Term
	Redevelopment Medium Term
	Redevelopment Long Term
	Plans of Subdivision

Land Supply Inventory, 2016 Niagara Region - West Lincoln

- Vacant Residential Built-Up Area
- Vacant Residential Greenfield
- Vacant Employment Built-Up Area
- Vacant Employment Greenfield
- Plans of Subdivision





MUNICIPAL COMPREHENSIVE REVIEW

Phase 3 Strategic Growth Option for Niagara Region *Summary Report*

Niagara  Region

HEMSON

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BrookMcIlroy/

November 2016

TABLE OF CONTENTS

I	HOW WE GROW	1
II	ITERATIVE PROCESS AND COLLABORATIVE RESULTS	3
III	IDENTIFYING GROWTH OPTIONS	5
IV	RESULTS OF CONSULTATION ON OPTIONS	15
V	PREFERRED GROWTH ALLOCATION	17
VI	NEXT STEPS	22

List of Tables

- Table 1 Population and Employment Growth under *Growth Plan* Schedule 3
- Table 2 MCR Shares of Regional Housing Unit Growth by Local Municipality
- Table 3 MCR Growth Option 1: Current Policy – Intensification Targets and Housing Unit Growth by *Growth Plan Area*
- Table 4 MCR Growth Option 2: Market Trends – Intensification Targets and Housing Unit Growth by *Growth Plan Area*
- Table 5 MCR Growth Option 3: Strategic Growth – Intensification Targets and Housing Unit Growth by *Growth Plan Area*
- Table 6 MCR Growth Options: Forecast Total Population Growth by Local Municipality
- Table 7 Strategic Growth Option Shares of Regional Housing Unit Growth
- Table 8 Strategic Growth Option Forecast Housing Units by Local Municipality
- Table 9 Strategic Growth Option - Intensification Targets and Housing Unit Growth by *Growth Plan Area*
- Table 10 Strategic Growth Option Forecast Total Population by Local Municipality
- Table 11 Strategic Growth Option Forecast Employment by Local Municipality

List of Exhibits

- Exhibit 1 Understanding Niagara's Expected Growth
- Exhibit 2 Limits to Urban Expansion
- Exhibit 3 Differentiation in Vacant Land Supply to Accommodate Growth
- Exhibit 4 Strategic Growth Option

Appendices

- Appendix A
Niagara Master Servicing Plan 2016 – MCR Phase 1 & 2 Land Supply – Water & Waster Water Servicing Constraints and Opportunities Overview
- Appendix B
Transportation Master Plan – MCR Phase 3 Growth Options Analysis

I How We Grow

This report outlines the process followed to arrive at a preferred option to guide growth in Niagara Region to 2041 and represents the culmination of Phase 3 of a Regional Municipal Comprehensive Review (MCR). This is central to the Region's broader, coordinated planning process and a key milestone for the Regional Official Plan Review, *Niagara 2041*. Determining how and where the Region should grow over the long term is critical to achieving a healthy and sustainable growth outlook for Niagara, supporting economic prosperity and planning for regional and local services. The strategic approach to distributing forecast population, housing and employment growth and allocating intensification targets across Niagara is important to determining key infrastructure elements that the Region will need to provide over time.

The *Growth Plan for the Greater Golden Horseshoe (Growth Plan)* provides the population and employment growth that the Region must plan for through Schedule 3. Niagara Region is forecast to grow to a population of 610,000 residents, and employment is anticipated to grow to 265,000 jobs by 2041.

The initial phases of the MCR involved analysis of historic and emerging growth trends, development patterns and future prospects across Niagara Region. The MCR Phase 1 & 2 Background Report (March 2016) presented key findings and identified a number of challenges and opportunities facing the Region in managing growth going forward within the context of Provincial policy and the *Regional Official Plan*. The results of Phase 1 & 2 have been shared and discussed with Regional staff, the public, key stakeholders and staff from Niagara's area municipalities, as well as with Regional Council.

Key findings included:

- Niagara is not growing at a fast pace overall and the level of growth which is occurring varies significantly across the Region. The pattern of population growth, largely reflected in demand for new housing, has not materially changed in recent years.
- Housing growth has been outpacing growth in population, reflecting an aging population. This demographic trend is occurring in Niagara and many Ontario communities.
- The decline in Ontario's manufacturing employment in recent years has affected Niagara's economic prospects, although the Region has many opportunities to enhance its economic outlook going forward.
- Similar to many communities outside of the Province's largest urban centres, Niagara is experiencing the out-migration of young adults, largely to education and employment

opportunities, while some communities within the Region remain quite attractive to those over 60 years of age.

- Recent housing development in the Region suggests that Niagara is already meeting its *Growth Plan* general intensification target with 40% of new housing being built within the Built Up Area. There are considerable opportunities for housing intensification and many Niagara municipalities are planning for higher densities and redevelopment within built up areas.
- The capacity to accommodate population and employment growth is unevenly distributed across Niagara municipalities, which poses some challenges for planning to meet the Region's Schedule 3 outlook. The distribution of vacant urban designated land across a geographically large and dispersed Region is, in some areas, not aligned with the market potential for growth.

The balance of this report is organized into five sections:

- Section II outlines the MCR process from the initial trends analysis through to the identification of a strategic option to manage growth across Niagara Region in a manner consistent with Provincial policy and supportive of the Region's objectives for long-term sustainable growth and economic prosperity.
- Section III describes the fixed assumptions and the approach to understanding how much variation there can be in identifying options for growth within the Provincial policy framework and identifies the three options for growth that were developed.
- Section IV highlights the consultation process on the growth options input received from Regional and local municipal staff, public and key stakeholders and the Region's Co-ordinated Joint projects teams, working towards a preferred growth strategy to maximize Regional investments in critical infrastructure and set the stage for long-term economic growth and prosperity across Niagara.
- Section V presents the Strategic Growth Option for Niagara to 2041, including a recommended allocation of Schedule 3 population and employment growth, housing and intensification targets to each area municipality.
- Section VI outlines the next steps in the MCR process.

II Iterative Process and Collaborative Results

Phase 3 of the MCR has involved a detailed examination of how the population and employment growth forecasts for the Region under *Growth Plan* Schedule 3 should be distributed across this large and diverse Region. Beginning with a workshop with Area Municipal Planners in February 2016, insights, analysis and discussion with Regional staff and other Niagara 2041 co-ordinated project teams contributed to the development of three growth options. Local and Regional priorities, constraints and influences on growth options were discussed at a second Area Planners workshop in April 2016. Additional input to assessing how and where the Region could grow was also gained through an extensive consultation process and integrative approach with the Transportation Master Plan (TMP) and Master Servicing Plan (MSP) project teams. Details of the chronology in the development and evaluation of options for growth include:

- Public Information Centres – November 17, 18, and 19, 2015;
- Stakeholder interviews – January 26 and 27, 2016;
- Regional Council Workshop – February 18, 2016;
- Niagara 2041 joint projects team – including the MSP and TMP teams and Regional staff – March 4, 2016;
- Workshop with Area Planners, April 19, 2016;
- Discussions with Area Planners and Provincial staff through May, 2016;
- Public Information Centres – June 15, 16, and 22, 2016;
- Workshops and meetings with the Niagara 2041 team and Area Planners – June to September 2016;
- On-going meetings and discussions with Area Planners, Regional staff and Niagara 2014 Co-ordinated Joint Projects teams.

Three different options for allocating Regional growth across Niagara are presented and described in terms of key features and variations on policy and market influences. Additional commentary is provided on servicing and land supply implications of each option.

In May 2016, the Province released proposed amendments to the *Growth Plan for the Greater Golden Horseshoe* along with amendments to the *Greenbelt Plan* and *Niagara Escarpment Plan*. While the overall growth forecasts were not amended, the proposed policy changes could have a significant effect on the Region's land budget and implications for the recommended growth option as well as affecting the resulting amendments to the *Regional Official Plan* ultimately

coming out of the MCR. Among the policy changes being contemplated by the Province are an increase in general intensification targets to 60% and an increase in the density target to an average 80 residents and jobs per hectare across the Region's designated greenfield areas. Additionally, the proposed amendments reinforce an emphasis on directing development to transit corridors and station areas as well as an expressed concern over climate change. These changes could directly affect Niagara's emerging growth management policy. The consultation period for these amendments concluded in October 2016. The timing of the final Provincial policy plan amendments is currently unknown.

While the Province is processing the commentary received on the proposed amendments to the *Growth Plan*, *Greenbelt Plan*, and *Niagara Escarpment Plan*, the conclusion of the MCR for Niagara Region will be delayed. However, since the proposed amendments do not change the overall growth assignments for the Region, Phase 3 has advanced with a detailed evaluation of how best to facilitate and accommodate growth. This was necessary in order to advance the work of the Transportation Master Plan (TMP) and Master Servicing Plan (MSP) projects so they could identify key infrastructure elements that might inform the review of the Region's Development Charges By-law.

Additionally, the Provincial announcement during the summer of plans to extend GO Rail service to Niagara Region (to Grimsby and St. Catharines by 2021 and Niagara Falls by 2023) addresses one of Council's key strategic initiatives, and is seen as having a critical influence on where and how the Region will grow.

The result is that Phase 3 will conclude with the recommended growth strategy as outlined in this report. The full implications of this recommended strategy including a land budget to accommodate the growth cannot be completed until the Province releases the final amendments to the *Growth Plan*, *Greenbelt Plan* and *Niagara Escarpment Plan*. Once known, the resulting directions for amending the *Regional Official Plan* can be brought forward.

III Identifying Growth Options

The purpose of developing alternative growth options is to evaluate how best to manage growth in order to accommodate the population and employment forecasts for Niagara Region under Schedule 3 of the *Growth Plan*. Prior to the adoption of the *Growth Plan* and the more direct involvement by the Province in local planning, a growth management study might typically have examined a range of growth forecasts, considering, for example, alternative scenarios of high, medium or low growth levels reflecting variations on planning policy priorities, demographic trends and economic growth potential. Since 2006, the Province has set the growth forecasts for regional and single-tier municipalities throughout the Greater Golden Horseshoe, requiring them to plan for specific population and employment figures set out in Schedule 3 of the *Growth Plan*. The 2031 Schedule 3 forecasts were updated in 2013 and extended to a 2041 planning horizon, as shown below.

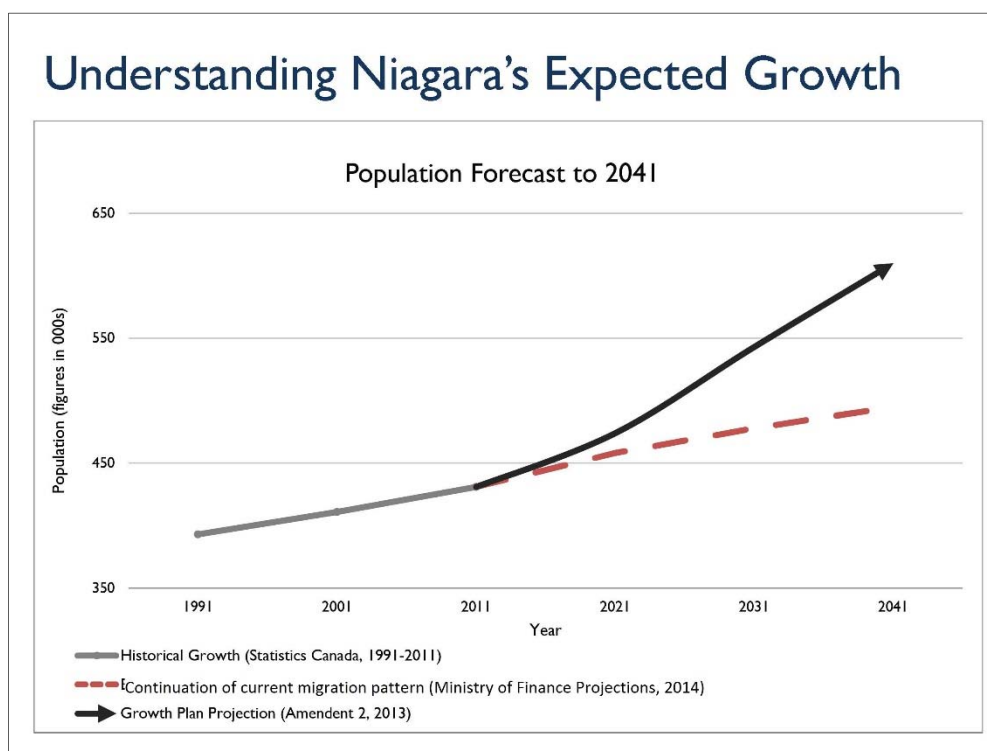
Table 1

Population and Employment Under Growth Plan Schedule 3, Niagara Region, 2031-2041							
Original Forecast		Updated Forecast					
Population	Employment	Population			Employment		
2031 A	2031 A	2031 B	2036	2041	2031 B	2036	2041
511,000	218,000	543,000	577,000	610,000	235,000	248,000	265,000

Given the fixed Regional forecasts, the alternatives to be considered by the Region in planning for growth are somewhat limited to where and how the growth is distributed across the Region. The *Growth Plan* also provides guidance in this regard, with its policies for managing growth, including minimum Regional targets for intensification and development densities in Designated Greenfield Areas. The purpose of the MCR growth option evaluation was to consider allocating for growth to 2041 within the Region, and how it can manage growth to benefit Niagara as a whole.

The three options described in detail on the following pages are distinguished by different approaches to where and how growth will take place across the Region. While some municipalities may be allocated a smaller relative share of growth than currently found in the *Regional Official Plan*, it is important to understand that the proposed shares are based on a larger quantum of Region-wide growth from the updated Schedule 3 forecasts under Amendment 2 to the *Growth Plan*. The Region as a whole has a much higher forecast than in the past, and a forecast rate of growth higher than recent experience, as illustrated in Exhibit 1.

Exhibit 1



A. Fixed Assumptions and Variable Elements

The development of growth options for review through the MCR must adhere to the fixed parameters set out in Provincial policy while carefully considering a number of potential variable elements. Within this framework consideration was given to localized growth potential, area municipal priorities and aspirations and Regional growth management and economic development objectives. The following describes the fixed and variable aspects of the growth options.

Fixed Assumptions

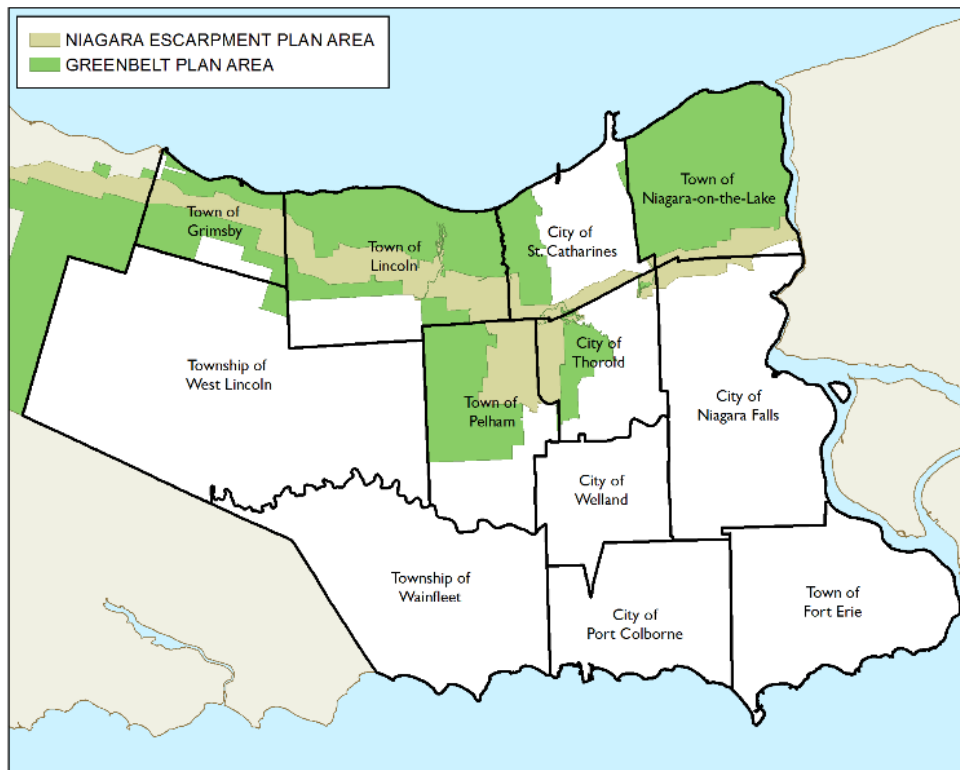
Provincial policy presents some elements guiding growth management that are fixed for all three options:

- *Growth Plan* Schedule 3 forecasts for 2041 of population and employment are to be planned for:
 - 2011 – 2041 growth of 168,000 residents and 80,000 jobs;
- *Greenbelt Plan* boundaries remain fixed, pending the outcomes of the Provincial review of the *Greenbelt Plan*;
- *Niagara Escarpment Plan* (NEP) boundaries remain fixed, pending Provincial review of the NEP;

- *Growth Plan* minimum intensification target: 40% of residential development occurring annually must be planned for within the Built Up Areas Region wide (proposed to be 60% under draft 2016 *Growth Plan*);
- *Growth Plan* minimum density target for Designated Greenfield Areas (DGA): DGA's must be planned to achieve 50 residents and jobs combined per ha at a Region-wide level (proposed 80 residents and jobs combined per ha under draft 2016 *Growth Plan*); and
- *Growth Plan* Urban Growth Centre (UGC) minimum density target: St. Catharines UGC must be planned to achieve a minimum density of 150 residents and jobs per ha.

The geographic limits of the Niagara Escarpment Planning Area and the area governed by the Greenbelt Plan are illustrated in Exhibit 2.

Exhibit 2 Limits to Urban Expansion



Variable Elements

Some elements that can vary when considering growth options for Niagara Region include:

- Shares of Regional growth to 2041— the Region can allocate the *Growth Plan* forecast growth to local municipalities across Niagara in varied ways;
- The build-out timing of vacant greenfield land supply and additional land needs will also vary depending on the growth allocations; and
- Variations in local municipal intensification targets, taken together, contribute to meeting the Regional minimum and affect Built Up Area land supply.

Other factors that affect potential growth rates and which have been considered in developing a strategic approach to managing growth in Niagara include:

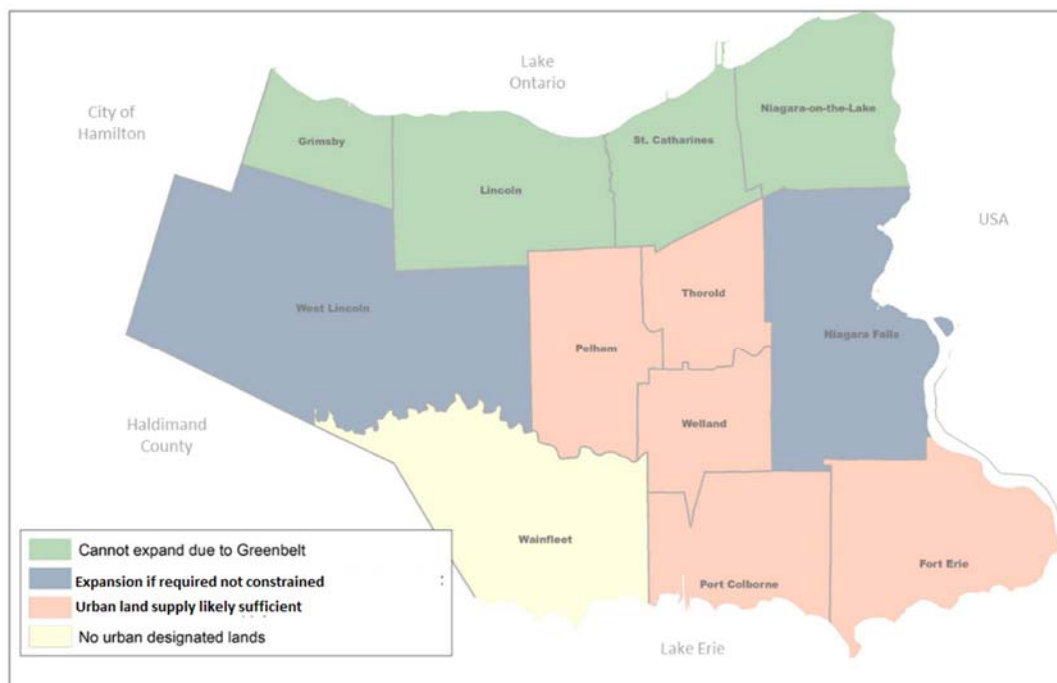
- Migration from the GTA;
- Retention of young families;
- GO Rail Service extension;
- South Niagara Hospital development;
- Economic shifts; and
- Transit Stations and Hub potential.

In addition, variations in the capacities of local municipalities to accommodate growth have been considered, including:

- designated vacant land supply;
- available and planned infrastructure and services;
- market demand;
- demographic and economic characteristics;
- proximity and accessibility to the western GTAH labour market;
- natural heritage features; and
- local priorities for growth.

Some of these elements are brought together in Exhibit 3 below to illustrate the differentiation of the potential for each municipality to accommodate growth as relates to land supply availability and demand.

Exhibit 3 Differentiation in Vacant Land Supply to Accommodate Growth



Taking into account the results of the MCR Phase 1 & 2 background analysis, the fixed Provincial growth targets and policies, Regional and local municipal characteristics and priorities for future growth and development in Niagara, three growth options were developed and evaluated in consultation with Regional staff, Area Planners, key stakeholders and the Co-ordinated Joint Projects teams that are concurrently preparing a Transportation Master Plan (TMP) and Master Servicing Plan (MSP) for the Region.

B. Options for Growth

Based on the process and parameters described above, the following three options provided a starting point for determining a preferred growth option for Niagara Region:

- Option 1: Current Policy
- Option 2: Market Driven
- Option 3: Strategic Growth

Option 1: Current Policy

The premise for this option is a continuation of the last Regional MCR approach and current *Regional Official Plan* policy balance in terms of the allocation of growth targets among the 12 local municipalities. The shares allocated in the *Regional Official Plan* have been adjusted only minimally to reflecting recent development trends and land supply absorption. The distribution of the higher population and employment forecasts of Schedule 3 of the *Growth Plan* under Amendment 2 between the municipalities are not fully reflecting either recent market realities, or recent performance against current targets.

The underlying principle in this option is that local municipalities within Niagara are given relatively equal expectations for growth. In terms of policy, this might be characterized as a status quo option. However, there is an underlying assumption that the market will work within the current policy framework.

The *Greenbelt Plan* and *Niagara Escarpment Plan* boundaries are fixed. This option reflects the current *Regional Official Plan* structure and strategy, including an objective to direct growth to municipalities in the southern part of the Region.

While this option recognizes the role of the Urban Growth Centre in keeping with the *Growth Plan*, it does not envision significant increases in development here beyond that currently contemplated in the *Regional Official Plan*. Nor does it consider the extension of GO Rail service to the Region or any significant intensification at transit hub locations.

Intensification rates were adjusted, however, resulting in a Region-wide rate of 46% owing to higher growth overall and slightly higher growth assignments to St. Catharines, Niagara Falls and Grimsby. This option has potential implications from a land budget standpoint of a shortfall in northern municipalities and significant surplus in the south.

Region-wide Intensification target: 46%

Potential Implications:

This option would likely reinforce current slow growth trends, resulting in:

- Possible failure to attain the Region-wide growth forecast by 2031, or 2041;
- Limited interest in intensification, save for some key locations in higher growth municipalities;
- Continuation of single detached housing largely in greenfield settings, affecting the ability to attain density targets and policy objectives; and
- Possible continued slower economic and housing growth.

Option 2: Market Driven

This option is grounded in recognizing current and recent market trends. The influence of the GTAH economy is the central driver leading to a weighted allocation of population growth to the north and west municipalities of Grimsby, West Lincoln and Lincoln as well as to Niagara Falls and Niagara-on-the-Lake for a key segment of market demand. Growth allocations to municipalities in the south are significantly lower reflecting recent market interest. This option acknowledges a limited role of policy to influence market demand.

The quantum of growth allocated to some municipalities may suggest a need for urban boundary expansions in some municipalities, while there would likely be pressure to de-designate ‘surplus’ greenfield land in other municipalities with more limited market demand. The fixed constraint posed by the Greenbelt boundary in municipalities that would see considerable market interest results in driving intensification rates up. Given existing policy and incentives to encourage employment growth in Downtown St. Catharines and the Gateway Employment Lands are now showing some positive results, employment may be focused in these areas as well as along the QEW corridor near the lakeshore.

The underlying principle in this option is that the market will go where the market wants to go and that Regional and local Official Plan policy will have little effect over this – if the Region’s primary goal is growth, it must provide for the market, other policy objectives aside. The Greenbelt and Niagara Escarpment Plan boundaries remain fixed in this option, but there may be implications for these two Provincial plans in the way policy is applied and implemented.

Intensification rates here are adjusted owing to fixed constraints. This results in a Region-wide rate of 54% owing to the higher growth overall and allocations of significant growth to northern municipalities.

Region-wide Intensification target: 54%

Potential implications:

- Any need to expand urban boundaries in the north – notably Grimsby and Niagara-on-the-Lake – could not be accommodated given the Greenbelt boundary.
- The market focus in the north may lead to pressure to expand the settlement area of Smithville.
- Following previous expressions of interest from MMAH and the reinforced direction from the Province's Coordinated Land Use Planning Review, this option could lead to de-designation of lands from the Designated Greenfield Areas of some settlement areas in the south.

Option 3: Strategic Growth

This option acknowledges current and emerging Regional market pressures as well as broader policy objectives of the *Growth Plan* and the Region – as influenced by the emerging urban structure policy, planning implementation measures, and the strategic directions of Regional Council. The option sees a focus for growth along the QEW corridor through Grimsby, Lincoln and St. Catharines as well as in Niagara Falls. A north/south corridor along Highway 406 and the Welland Canal could also be important in linking:

- a) intensification (in St. Catharines);
- b) current greenfield potential (in Thorold); and
- c) employment growth (both in St. Catharines and the Economic Gateway).

Within these corridors growth will be concentrated in Downtown St. Catharines and at the Transit Station Hubs in Grimsby, St. Catharines and Niagara Falls.

Recognizing the current land supply potential, increased intensification rates and an expressed desire through the Province's Coordinated Land Use Planning Review for higher greenfield development densities, this option could be based on limited or no urban boundary expansion. 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.

The future role of Smithville is a key variable in this option as other municipalities build out to the Greenbelt limit. For example, how strategic is it to allocate growth to Smithville if it becomes a bedroom community for the western GTAH?

The underlying principle in this option reflects a balance of market and policy drivers, grounded in a strategic economic development and an urban focus for the Region.

The option would require increased intensification rates for many municipalities:

- in the north due to limitations in greenfield expansion opportunities; and
- in the south reflecting a slower pace of growth, more limited demand for new development and potential de-designation or phasing out of what seem to be surplus land supply.

Region-wide Intensification rate: 60%

Potential implications:

- Implements an urban structure that is geared to attracting and retaining population and jobs.
- By focusing growth on the UGC and Transit Hubs this option best positions the Region for extension of GO Rail service in 2021 and 2023.
- Preserves Greenbelt and tender fruit lands which emerged as key objectives at the PIC and with Area Planners, as well as at the Regional Council Briefing.
- Economic growth is focused on the UGC and Gateway Employment Lands, as well as other employment lands and emerging regional sub-centres as the economy diversifies.
- This is perhaps the best option for protecting natural heritage as expressed at the PIC.
- The new urban structure for the Region will foster development of complete communities and transit-supportive densities.

The resulting housing and population distribution by local municipality attached to each of the growth options are summarized in the following Tables and Exhibits. Table 2 provides the relative shares of housing unit growth by local municipality under each growth option. Tables 3,4 and 5 provide the intensification targets and resulting forecast housing unit breakdown between Built Up Areas and Designated Greenfield Areas for each option. The housing unit forecast provides the basis for population growth, as shown in Table 6.

Table 2

MCR Growth Options Shares of Regional Housing Unit Growth by Local Municipality 2016-2041			
Municipality	Option 1: Current Policy	Option 2: Market Driven	Option 3: Strategic Growth
St. Catharines	17%	15%	22%
Grimsby	6%	7%	7%
Lincoln	5%	6%	5%
West Lincoln	7%	10%	8%
Niagara-on-the-Lake	8%	10%	8%
Niagara Falls	19%	26%	21%
Thorold	7%	4%	5%
Pelham	7%	4%	5%
Welland	10%	8%	8%
Fort Erie	9%	7%	8%
Port Colborne	4%	2%	2%
Wainfleet	1%	1%	1%
Niagara Region	100%	100%	100%

Table 3

MCR Draft Growth Option 1: Current Policy Intensification Targets and Forecast Unit Growth by <i>Growth Plan</i> Policy Area				
Municipality	2016-2041 Total Housing Unit Growth	Intensification Target	Built Up Area Units	Designated Greenfield Area Units
St. Catharines	11,290	95%	10,700	600
Grimsby	3,990	95%	3,800	200
Lincoln	3,320	75%	2,600	700
West Lincoln	4,660	15%	700	4,000
Niagara-on-the-Lake	5,320	50%	3,100	2,200
Niagara Falls	12,630	40%	5,100	7,600
Thorold	4,660	15%	700	4,000
Pelham	4,650	15%	700	4,000
Welland	6,640	40%	2,700	4,000
Fort Erie	5,980	15%	900	5,100
Port Colborne	2,660	15%	400	2,300
Wainfleet	660	0%	-	700
Niagara Region	66,500	46%	31,400	35,000

Figures are rounded.

Table 4

MCR Draft Growth Option 2: Market Driven Intensification Targets and Forecast Unit Growth by <i>Growth Plan</i> Policy Area				
Municipality	2016-2041 Total Housing Unit Growth	Intensification Target	Built Up Area Units	Designated Greenfield Area Units
St. Catharines	9,960	95%	9,500	500
Grimsby	4,650	95%	4,500	200
Lincoln	3,990	80%	3,200	800
West Lincoln	6,650	20%	1,300	5,300
Niagara-on-the-Lake	6,650	60%	4,500	2,200
Niagara Falls	17,280	40%	6,900	10,400
Thorold	2,660	20%	500	2,100
Pelham	2,660	20%	500	2,100
Welland	5,310	40%	2,100	3,200
Fort Erie	4,650	60%	2,800	1,900
Port Colborne	1,330	20%	300	1,100
Wainfleet	660	0%	-	700
Niagara Region	66,500	54%	36,100	30,400

Figures are rounded.

Table 5

MCR Draft Growth Option 3: Strategic Growth Intensification Targets and Forecast Unit Growth by <i>Growth Plan</i> Policy Area				
Municipality	2016-2041 Total Housing Unit Growth	Intensification Target	Built Up Area Units	Designated Greenfield Area Units
St. Catharines	14,600	95%	13,870	730
Grimsby	4,700	95%	4,465	235
Lincoln	3,300	75%	2,475	825
West Lincoln	5,300	25%	1,325	3,975
Niagara-on-the-Lake	5,300	50%	2,650	2,650
Niagara Falls	14,000	50%	7,000	7,000
Thorold	3,300	25%	825	2,475
Pelham	3,300	30%	990	2,310
Welland	5,300	50%	2,650	2,650
Fort Erie	5,300	60%	3,180	2,120
Port Colborne	1,300	25%	325	975
Wainfleet	700	0%	-	700
Niagara Region	66,500	60%	39,800	26,700

Figures are rounded.

Table 6

MCR Growth Options Forecast Total Population Growth (Including Census Net Undercoverage), 2016 -2041							
Municipality	2016	2041			2016-2041 Growth		
		Option 1: Current Policy	Option 2: Market Driven	Option 3: Strategic Growth	Option 1: Current Policy	Option 2: Market Driven	Option 3: Strategic Growth
St. Catharines	133,820	159,390	157,030	167,530	25,570	23,210	33,710
Grimsby	27,580	35,800	37,070	37,270	8,220	9,490	9,690
Lincoln	23,950	31,660	33,050	31,730	7,710	9,100	7,780
West Lincoln	14,670	27,780	33,100	29,450	13,110	18,430	14,780
Niagara-on-the-Lake	17,950	29,010	31,760	29,170	11,060	13,810	11,220
Niagara Falls	87,740	118,280	130,100	121,660	30,540	42,360	33,920
Thorold	18,790	31,020	25,880	27,620	12,230	7,090	8,830
Pelham	17,190	28,810	23,640	25,260	11,620	6,450	8,070
Welland	52,550	69,120	66,110	66,190	16,570	13,560	13,640
Fort Erie	31,030	45,730	42,240	43,940	14,700	11,210	12,910
Port Colborne	18,510	25,020	21,690	21,800	6,510	3,180	3,290
Wainfleet	6,540	8,380	8,340	8,390	1,840	1,800	1,850
Niagara Region	450,300	610,000	610,000	610,000	159,700	159,700	159,700

The following section describes the feedback received on the options from various consultation sources as input to the development of a preferred growth option for the Region.

IV Results of Consultation on Options

A range of factors were considered through the evaluation process including further discussions with Area Municipal staff throughout the summer of 2016.

The implications of each option from a local perspective of growth outlook, land supply, servicing and targets were explored with Area Planners who were asked to consider what each option means for their local municipality and the Region as a whole in terms of achieving a healthy and sustainable growth outlook for Niagara and meeting its obligations for managing growth within the Provincial policy framework. These implications were further analysed in consultation with Regional and Area Municipal staff, key stakeholders and the Regional Coordinated Projects teams.

Key policy areas and priorities were identified as criteria for evaluating the options. These criteria address:

- Current and emerging Provincial Policy direction;
- Current and emerging *Regional Official Plan* objectives;
- Regional Council strategic directions; and
- Priorities identified by Area Municipal Planners.

The options were considered within the context of six overarching themes:

- Growth Management;
- Urban Structure;
- Economic Diversification;
- Infrastructure Investment;
- Moving People and Goods; and
- Natural Systems and Environmental Protection.

The growth options were also the focus of Public Information Centres on June 15th, 16th, and 22nd, 2016 where support for the Strategic Growth option was expressed.

From the standpoint of municipal servicing and infrastructure needs, the MSP and TMP teams conducted a high level evaluation of constraints and opportunities relating to the three options. Some key findings are highlighted below and the full evaluation documents are provided as Appendix A and B.

The MSP team noted that, while some incremental improvements to water and wastewater infrastructure were identified, the variations do not significantly change the overall trunk and wastewater infrastructure needs.

The TMP team evaluated the options against three key criteria:

- Density to support transit;
- Integrating land uses; and
- Maximizing existing transportation infrastructure.

Their conclusion was that the Strategic Growth option had the highest potential as measured against these three criteria.

The comments from the Area Municipal Planners workshop and Public Information Centres, continued consultation with Regional and local municipal staff and the Co-ordinated Joint Projects teams along with additional detailed analysis of land supply and local capacities to accommodate growth helped to inform refinements to the Strategic Growth option as a preferred option for growth.

Detailed work was undertaken to further explore how this option might be distributed across the Region at a finer scale, a geography referred to as Traffic Zones, in order for the MSP and TMP teams to further evaluate infrastructure needs. Regional staff met with Area Planners over the course of the summer and fall of 2016 to discuss the local municipal review of the draft Strategic Growth Option and traffic zone level work. This consultation round resulted in further refinements to shares of housing and employment growth and intensification rates.

The result is a recommended Strategic Growth Option for managing planned growth across Niagara Region, including allocations of housing, population and employment growth and intensification targets as presented in the following section.

V Preferred Growth Allocation

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 GTAH 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.

As described earlier, this strategic approach reflects a balance of market and policy drivers, grounded in a strategic economic development and urban focus that will work to lift the Region as a whole.

Some considerations with regard to urban structure and form:

- Over 45% of all housing growth is allocated to St. Catharines and Niagara Falls reflecting the importance of reinforcing the major urban areas with full community services.
- Three municipalities are each assigned 8% of housing growth to 2041;
 - Welland and Fort Erie are established urban centres with the requisite services to accommodate growth which reflects the assignment of 50% intensification rates;
 - In West Lincoln an 8% share of housing growth represents a more-than-doubling of the overall housing stock. With much of this growth assigned to the recently enlarged Designated Greenfield Area, intensification in the Smithville area is assigned at 15%.
- Intensification rates will be over 90% in St. Catharines and Grimsby as they face the limits imposed by the Greenbelt Plan designation, while Niagara Falls is assigned a 50% rate for intensification reflecting the adequacy of currently designated greenfield lands to accommodate half of the growth.

This option for allocating growth is the result of extensive collaboration and is seen to be the most reasonable option to move forward with for assessing the Region's infrastructure needs and

for the Region and area municipalities to work with to realize the outlook to 2041 and build a competitive economy.

As already noted, some municipalities have been allocated a smaller relative share of growth than currently found in the *Regional Official Plan*. However, there is a significantly higher quantum of growth anticipated Region-wide under Amendment 2 to the *Growth Plan* and every Niagara municipality is anticipated to grow in some measure. The Region as a whole has a much higher forecast than in the past and all local municipalities are anticipated to grow.

Exhibit 4 and Tables 7-11 below present the distribution of growth across Niagara Region indicating:

- shares of Regional housing unit growth by local municipality within Niagara;
- the resulting forecast total housing unit growth from 2016 to 2041;
- local intensification targets to 2041 and resulting breakdown of unit growth anticipated for Built Up Areas and on Designated Greenfield Areas;
- forecast total population by local municipality from 2016 to 2041; and
- 2016-2041 forecast total place of work employment by local municipality.

Exhibit 4

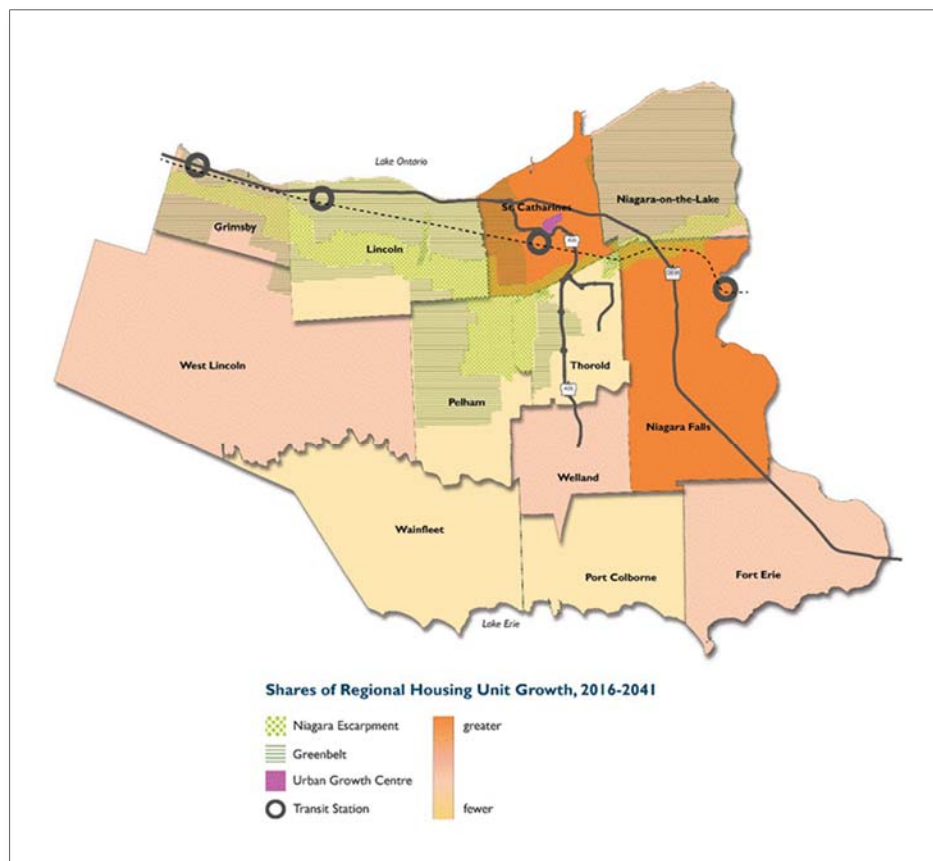


Table 7

MCR Strategic Growth Option Shares of Regional Housing Unit Growth 2016-2041		
Municipality	Total Unit Growth	Share of Region
Fort Erie	5,320	8.0%
Grimsby	4,650	7.0%
Lincoln	3,320	5.0%
Niagara Falls	15,330	23.0%
Niagara-on-the-Lake	3,940	6.0%
Pelham	3,320	5.0%
Port Colborne	1,330	2.0%
St. Catharines	14,620	22.0%
Thorold	3,660	5.5%
Wainfleet	330	0.5%
Welland	5,320	8.0%
West Lincoln	5,320	8.0%
Niagara Region	66,460	100.0%

Figures are rounded.

Table 8

MCR Strategic Growth Option Forecast Housing Units by Local Municipality, 2016 -2041											
Municipality	Housing Units									2016-2041	
	2001	2006	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
Fort Erie	11,380	12,220	12,550	13,000	13,740	14,790	16,020	17,340	18,320	5,320	1.38%
Grimsby	7,590	8,730	9,620	10,560	11,600	12,590	13,470	14,360	15,210	4,650	1.47%
Lincoln	7,120	7,630	8,150	8,710	9,250	9,820	10,620	11,420	12,030	3,320	1.30%
Niagara Falls	31,510	32,480	33,380	35,250	37,860	40,850	44,230	47,810	50,580	15,330	1.45%
Niagara-on-the-Lake	4,960	5,460	5,920	7,010	7,950	8,760	9,410	10,180	10,950	3,940	1.80%
Pelham	5,600	5,920	6,200	6,440	6,830	7,450	8,290	9,150	9,760	3,320	1.68%
Port Colborne	7,620	7,790	7,910	7,950	8,090	8,360	8,690	9,040	9,280	1,330	0.62%
St. Catharines	53,820	54,730	55,420	56,520	58,870	61,570	64,880	68,440	71,140	14,620	0.92%
Thorold	6,920	7,060	7,090	7,420	7,890	8,610	9,480	10,410	11,080	3,660	1.62%
Wainfleet	2,230	2,390	2,340	2,410	2,460	2,520	2,600	2,680	2,740	330	0.51%
Welland	19,760	20,710	21,490	22,300	23,270	24,280	25,420	26,640	27,620	5,320	0.86%
West Lincoln	3,950	4,310	4,630	4,930	5,540	6,550	7,900	9,270	10,250	5,320	2.97%
Niagara Region	162,500	169,400	174,700	182,500	193,400	206,200	221,000	236,700	249,000	66,500	1.25%

Figures are rounded.

Table 9

MCR Strategic Growth Option				
Intensification Targets and Forecast Unit Growth by Growth Plan Policy Area				
Municipality	2016-2041 Total Housing Unit Growth	Intensification Target	Built Up Area Units	Designated Greenfield Area Units
Fort Erie	5,320	50%	2,660	2,660
Grimsby	4,640	98%	4,526	114
Lincoln	3,320	80%	2,643	677
Niagara Falls	15,330	50%	7,665	7,665
Niagara-on-the-Lake	3,940	40%	1,576	2,364
Pelham	3,320	25%	830	2,490
Port Colborne	1,330	25%	333	998
St. Catharines	14,620	95%	13,889	731
Thorold	3,660	25%	915	2,745
Wainfleet	330	0%	-	330
Welland	5,320	50%	2,660	2,660
West Lincoln	5,320	15%	798	4,522
Niagara Region	66,450	58%	38,495	27,955

Figures are rounded.

Table 10

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%

Figures are rounded.

Table 11

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%

Figures are rounded.

VI Next Steps

Following endorsement of a preferred growth option, Phase 4 of the MCR will involve developing a land budget and making recommendations for amending and bringing the *Regional Official Plan* into conformity with the (now draft) *Growth Plan*, 2016. While the timing of that work is dependent on the Province releasing final amendments to the *Growth Plan*, other elements of Niagara 2041 can, and need, to move forward in order for the Region to proactively plan for growth and development, and the necessary infrastructure to support it, in an economically viable manner.

The specific features of the Strategic Growth Option have been examined by the project teams working on the TMP) and MSP. Those projects are currently evaluating the Region's infrastructure needs in the context of the proposed Strategic Growth Option as input to the Development Charges By-law Background Study which must conclude in advance of the August 31, 2017 DC By-Law expiration.

Once the Province releases final amendments to the *Growth Plan*, the MCR can proceed to finalize the allocations, evaluate the implications for urban land designations and settlement area boundaries and develop policies for the *Regional Official Plan*.

Appendix A

Niagara Master Servicing Plan 2016

MCR Phase 1 & 2 Land Supply – Water & Waster Water Servicing Constraints and Opportunities Overview



Date: 2/8/2016 File: 715023
 To: David Shen – Niagara Region
 From: Julien Bell – GM BluePlan
 Project: Niagara Master Servicing Plan 2016
 Subject: MCR Phase 1 & 2 Land Supply – Water and Wastewater Servicing Commentary

TECHNICAL MEMO - DRAFT

This memo summarizes the water and wastewater servicing opportunities and constraints related to the Regional Land Supply identified in the MCR Phase 1 & 2 Draft Report.

This summary information is a cursory review of the infrastructure requirements to support buildout growth of the land supply as provided. This summary is not intended to capture specific or general capital upgrade and/or operational improvement requirements of the water and wastewater systems.

Servicing Opportunities and Constraints Overview

The tables below provide an overview of the water and wastewater systems, by Local Area Municipality, capacity to support growth based on the available Land Supply identified in the MCR Phase 1 & 2 Draft Report.

Table 1 – Water and Wastewater Servicing Scoring

Servicing Score		
1	2	3
Very Supportive of Growth	Supportive of Growth	Constrained
<ul style="list-style-type: none"> Existing Infrastructure has Available Capacity to Support Growth Upgrades May Be Required to Support Full Land Supply Buildout 	<ul style="list-style-type: none"> Existing Infrastructure has Available Capacity to Support Growth Upgrades Will Be Required to Support Full Land Supply Buildout 	<ul style="list-style-type: none"> Existing Infrastructure Has Limited Capacity to Support Growth Short Term Upgrades Are Required to Support Growth.

Table 2 – Water and Wastewater Servicing Opportunities and Constrains Overview

Servicing Area		Water Servicing	Wastewater Servicing	Comments
Grimsby	Town	1*	2	Park Road Reservoir Upgrade Design Underway
	Kemp Hamlet	NA	NA	Private Servicing - No Municipal Servicing
	Treatment Plant	1	2	

Servicing Area		Water Servicing	Wastewater Servicing	Comments
Lincoln	Beamsville	2	1	
	Vineland	1	2	
	Jordan	1	1	
	Prudhomes	3	3	
	Campden	NA	1	Private Water Servicing - No Municipal Water Servicing
	Treatment Plant	1	2	
West Lincoln	Smithville	2	2	
	Treatment Plant	1	2	
Niagara Falls	City North	1	2	
	City South	2	3	
	Miller Estates	NA	NA	Private Servicing - No Municipal Servicing
	Treatment Plant	1	2	
St. Catharines	City	1	2	
	Treatment Plant	1	1	
Thorold	City North	1	2	
	City South	1	2	
	Port Robinson	1	2	
	Treatment Plant	1	1	
Welland	City	1	2	
	Treatment Plant	1	1 *	Welland Wastewater Treatment Plant Upgrade Construction Tendered
Pelham	Fonthill	2/3*	2	Area Specific Restrictions
	Fenwick	3*	3 *	Fenwick Sewage Pump Station Upgrade and Security of Supply Water Feed in Existing 10 Year Capital Budget
	Treatment Plant	1	1 *	Welland Wastewater Treatment Plant Upgrade Construction Tendered
NOTL	Glendale	1	2	
	Queenston	1	1	
	St. David's	1	2	
	Virgil	1	1	
	Old Town	1	1	
	Treatment Plant	1	1	

Servicing Area		Water Servicing	Wastewater Servicing	Comments
Port Colbourne	West of Canal	3	2 *	New Sewage Pump Station Required to Service Lands Along Western Boundary
	East of Canal	3	3	New Trunk Infrastructure is Needed to Service Development Lands
	Treatment Plant	1	1	
Fort Erie	Douglstown	2	1	
	Stevensville	1	2	
	Fort Erie	1	2	
	Crystal Beach	1	2	
	Treatment Plant	1	2	

Further detailed Water and Wastewater Servicing commentary is summarized in the following sections.

Grimsby

Water

- Fed by Grimsby Water Treatment Plant (WTP) → Build Out has potential to trigger capacity upgrade
- Storage (Floating) strategy essential to Build Out Servicing
- Kemp Hamlet to be serviced via private system → No Municipal servicing

Wastewater

- Flow to Baker Road Wastewater Treatment Plant (WWTP) → has capacity constraints, expansion will be required to support build Out
- Biggar Lagoons Sewage Pump Station (SPS) → Capacity upgrades to support Build Out will be required
- Roberts Road SPS has been upgraded → Sufficient capacity to support Build Out growth
- Other SPS → Sufficient capacity to support Build Out growth
- Kemp Hamlet to be serviced via private system → No Municipal servicing

Lincoln Water

- Beamsville
 - Fed by Baker Road WTP → Build Out has potential to trigger capacity upgrade
 - Single Feed to Beamsville → Security of supply trunk watermain twining may be required to support Build Out growth
 - Pumping →
 - Lincoln Booster Pump Station (BPS) → capacity upgrades required support Build Out growth
 - Local BPS (Lincoln) → Capacity may be impacted by Build Out growth
 - Storage → Sufficient capacity to support Build Out growth
- Vineland/Jordan/Prudhomes
 - Fed by DeCew WTP → Sufficient capacity to support Build Out growth
 - Pumping → Sufficient capacity to support Build Out growth
 - Storage → Sufficient capacity to support Build Out growth
 - Single Feed to Vineland → Security of supply trunk watermain twining may be required to support Build Out growth
 - Prudhomes → Growth has potential to trigger local trunk watermain upgrades or Storage upgrades
- Campden to be serviced via private system → No Municipal servicing

Wastewater

- Flow to Baker Road WWTP → has capacity constraints, expansion will be required to support build Out
- Jordan
 - Jordan Valley SPS has been upgraded → Capacity upgrades to support Build Out may be required
- Prudhomes
 - Laurie Ave SPS → limited capacity, capacity upgrades will be needed to support Build Out growth.
- Vineland/Jordan/Prudhomes
 - Victoria SPS (Servicing all of Vineland and Prudhomes) has been upgraded → Capacity upgrades to support Build Out may be required
- All of Lincoln
 - Ontario Street SPS → Capacity upgrades to support Build Out may be required
 - All other SPS → Sufficient capacity to support Build Out growth

West Lincoln Water

- Fed by Grimsby WTP → Build Out has potential to trigger capacity upgrade
- Pumping → Sufficient capacity to support Build Out growth
- Storage
 - Capacity upgrades to support Build Out may be required
 - Primarily pumped storage → storage (Floating) strategy essential to Build Out Servicing
- Single Feed → Security of supply trunk watermain twining may be required to support Build Out growth
- Local watermain upgrades needed to expand system

Wastewater

- Flow to Baker Road WWTP → has capacity constraints, expansion will be required to support build Out
- Smithville SPS has been upgraded → Capacity upgrades to support Build Out will be required

Niagara Falls Water

- Fed by Niagara Falls WTP → Sufficient capacity to support Build Out growth
- Pumps → Sufficient capacity to support Build Out growth
- Storage
 - Capacity upgrades to support Build Out may be required
 - Primarily pumped storage → Storage (Floating) strategy essential to Build Out Servicing
- Anticipated additional trunk watermain needed to support growth south of the Welland River
- Miller Estates to be serviced via private system → No Municipal servicing

Wastewater

- Flow to Niagara Falls WWTP → Capacity upgrades to support Build Out will be required
- WWTP SPS → Capacity upgrades to support Build Out will be required
- Grassy Brook SPS (South of Welland River) → Capacity upgrades to support Build Out will be required
- All other SPS → Capacity upgrades to support Build Out may be required
- Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers
- Miller Estates to be serviced via private system → No Municipal servicing

St. Catharines

- Land Supply has not flagged intensification

Water

- System fed by DeCew WTP → Sufficient capacity to support Build Out growth
- Storage and Pumping → Sufficient capacity to support Build Out growth

Wastewater

- Flow to Port Weller WWTP and Port Dalhousie WWTP
- Port Dalhousie WWTP → Sufficient capacity to support Build Out growth
- Port Weller WWTP → Capacity upgrades to support Build Out may be required
- SPS capacity → Sufficient capacity to support Build Out growth
- Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers

Thorold

- Additional growth areas identified in South Thorold

Water

- North/South Thorold
 - Fed by DeCew WTP → Sufficient capacity to support Build Out growth
 - Pumping → Sufficient capacity to support Build Out growth
 - Storage → Zone specific deficiency
 - Opportunity to support via supply from Niagara Falls and pumped storage at DeCew
- Port Robinson
 - fed by Niagara Falls WTP → East of Canal → Sufficient capacity to support Build Out growth
 - fed by Welland WTP → West of Canal → Sufficient capacity to support Build Out growth
 - Storage and Pumping → Sufficient capacity to support Build Out growth

Wastewater

- North and South Thorold
 - Flow to Port Weller WWTP and Port Dalhousie WWTP
 - Port Dalhousie WWTP → Sufficient capacity to support Build Out growth
 - Port Weller WWTP → Capacity upgrades to support Build Out may be required
 - Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers
- North Thorold
 - SPSs → Sufficient capacity to support Build Out growth
- South Thorold
 - SPSs → Capacity upgrades to support Build Out will be required
- Port Robinson
 - WWTP → Sufficient capacity to support Build Out growth
 - SPS → Capacity upgrades to support Build Out will be required

Welland Water

- Fed by Welland WTP → Sufficient capacity to support Build Out growth
- Storage and pumping → Sufficient capacity to support Build Out growth

Wastewater

- Flow to Welland WWTP → Sufficient capacity to support Build Out growth
 - WWTP Upgrade Tendered
- Filch St. SPS (West site) → current capacity deficit, upgrade planned and needed to support growth
- Remaining SPS → Sufficient capacity to support Build Out growth
- Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers, and Canal siphons

Pelham Water

- Fed by Welland WTP → Sufficient capacity to support Build Out growth
- Storage →
 - Pelham ET → current storage deficit, capacity upgrades required to support growth
 - Shoalts Drive → Sufficient capacity to support Build Out growth
- Pumping →
 - fed by Shoalts Drive PS → Capacity upgrades to support Build Out will be required
- Single feed to Fenwick → potential security of supply watermain twinning under significant growth scenarios

Wastewater

- Flow to Welland WWTP → Sufficient capacity to support Build Out growth
 - WWTP Upgrade Tendered
- Fonthill
 - Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers
- Fenwick
 - Foss Road SPS → current capacity deficit, upgrade planned and needed to support growth

Niagara-on-the-Lake Water

- System fed by DeCew WTP → Sufficient capacity to support Build Out growth
- Pumping → Sufficient capacity to support Build Out growth
- Storage →
 - Zone specific deficiencies
 - Opportunity to support via supply from Niagara Falls and pumped storage at DeCew

Wastewater

- Virgil and Old Town
 - All recommended 2011 W&WW Mater Plan upgrades online by 2017
 - Flows to NOTL WWTP → Sufficient capacity to support Build Out growth
 - SPS → Sufficient capacity to support Build Out growth Majority of system flows to NOTL WWTP
- St. David's
 - Flow to Niagara Falls WWTP → Capacity upgrades to support Build Out will be required
 - SPS → Capacity upgrades to support Build Out will be required
- Glendale
 - Flows to Port Weller WWTP → Capacity upgrades to support Build Out may be required
 - Infill and Greenfield growth will need to address wet weather F-5-5 impacts to local and trunk sewers, and Canal siphon
- Queenston
 - Flows to Queenston WWTP → Sufficient capacity to support Build Out growth
 - Plant is small with limited capacity, limited growth is expected

Port Colborne Water

- Fed by Port Colbourne WTP → Sufficient capacity to support Build Out growth
 - WTP replacement is planned, to maintain existing Capacity
- Storage
 - Existing deficiency → New storage needed to support growth
 - Primarily pumped storage → Storage (Floating) strategy essential to Build Out Servicing
- East of Canal
 - Single feed to East of Canal & no storage
 - Security of supply watermain twinning needed to support growth

Wastewater

- Flow to Port Colborne WWTP → Sufficient capacity to support Build Out growth
- SPSs
 - System has high number of SPS
 - Industrial SPS (North, West of Canal) → flows exceed DWF criteria ; however PWWF below station capacity → upgrade required to support growth
 - Remaining SPS → Capacity upgrades to support Build Out may be required
 - New SPS needed to support growth to the west of the City
 - New trunk infrastructure is needed to support development lands east of the Canal

Fort Erie Water

- Fed by Rosehill WTP → Sufficient capacity to support Build Out growth
- Storage
 - Capacity upgrades to support Build Out will be required
 - Primarily pumped storage → Storage (Floating) strategy essential to Build Out Servicing
- Single feed to Douglastown → potential security of supply watermain twinning under significant growth scenarios

Wastewater

- Stevensville and Douglastown
 - Flow to Douglastown Lagoon → Capacity upgrades to support Build Out will be required
 - Stevensville SPS → Capacity upgrades to support Build Out will be required
 - Douglastown SPS → Sufficient capacity to support Build Out growth
- Fort Erie Town
 - Flow to Anger Avenue WWTP → Sufficient capacity to support Build Out growth
 - SPS
 - Alliston SPS (Garrison Road) → has capacity constraints, upgrade will be required to support build Out
 - Lakeshore SPS → Capacity upgrades to support Build Out will be required
 - Remaining SPS → Sufficient capacity to support Build Out growth
- Crystal Beach
 - Flow to Crystal Beach WWTP
 - Capacity upgrades to support Build Out will be required
 - Size of system means costly marginal capacity increase
 - Shirley SPS (Shirley Road) → Capacity upgrades to support Build Out will be required
 - Nigh Road SPS Capacity currently ok → Capacity upgrades to support Build Out will be required

Appendix B

Transportation Master Plan – MCR Phase 3 Growth Options Analysis



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Memorandum

To/Attention	Loy Cheah, Niagara Region Greg Bowie, Niagara Region	Date	March 24, 2016
From	IBI Group	Project No	39096
cc			
Subject	Niagara Municipal Comprehensive Review Phase 3 Growth Options		

As part of Niagara Region's Municipal Comprehensive Review, three preliminary draft growth options were developed. These options have been presented at a municipal level only and more detailed allocation of the growth within each municipality (by area or traffic zone) is not available for this initial review.

This memorandum documents IBI Group's review and qualitative assessment of the draft growth options from a transportation perspective.

GROWTH OPTIONS

Each of the draft growth scenarios are compliant with the population and employment targets in the Provincial Growth Plan. The target for Niagara Region is 610,000 persons and 264,000 jobs in 2041. Total growth for Niagara in the 2016 to 2041 period is 159,100 persons and 63,400 jobs.

The three growth options vary by where and how growth will take place across the Region. The thumbnail description of each option is provided below:

1. **Minimal Shift** – largely reflects shares of growth currently assigned in the Regional Official Plan adjusted slightly to reflect the effects of the recent recession in slowing the pace of growth reflects growth currently assigned in the Region Official Plan, with minor adjustments
2. **Market Trends** – reflects current market interests including a general preference for new single family housing, a reluctance of the market to embrace intensification in a significant way, and the general influence of proximity to the GTHA market
3. **Strategic Policy** – reflects a strategic direction to implement an urban structure across the Region which will facilitate growth and diversify the local economy, while recognizing the influence of the market.

REVIEW

The assessment of the growth options was measured against three criteria as discussed below.

Loy Cheah, Niagara Region – March 24, 2016

Density to Support Transit

The allocation of growth to each of the local area municipalities varies by option. All three options allocate a large proportion of its growth to the Cities of Niagara Falls and St. Catharines, the two main population centres in the Region. Option 1 allocates 85,000 persons and jobs (38% of growth) to the two cities. Options 2 and 3 both allocate approximately 100,000 new persons and jobs (45% of new growth) to the two cities. By concentrating new growth to fewer areas, and the more urban/intensified areas, it is expected that higher land use densities would result. From a transportation perspective, higher land use densities are more supportive of transit.

Transit-supportive land uses and densities play a large role in a well utilized, successful transit system. Exhibit 1 outlines the Ministry of Transportation's guidelines for minimum densities to support various levels of transit service. As Niagara Region desires to put public transit first in its infrastructure planning, as per Policy 9.E.1 of the Region's OP, higher land use densities are preferred.

Allocating a higher proportion of growth to higher growth/density areas that are well-served by transit, such as downtown St. Catharines and transit hub locations, creates the opportunity for more people to choose transit as their travel mode.

Exhibit 1: Transit-supportive Land Use Densities (MTO Transit Supportive Guidelines)

Transit service type	Suggested minimum density
Basic transit service (One bus every 20-30 minutes)	50 residents + jobs per hectare
Frequent Transit Service (One bus every 10-15 minutes)	80 residents + jobs per hectare
Very frequent bus service (One bus every 5 minutes with potential for rapid transit)	100 residents + jobs per hectare
Dedicated rapid transit (LRT/BRT)	160 residents + jobs per hectare
Subway	200 residents + jobs per hectare

Although land use densities have yet to be identified in each of the three options, it is noted that Growth Option 3 balances growth between St. Catharines and Niagara Falls and has the highest region-wide intensification target at 50%. This indicates that Option 3 has the highest potential to create communities with densities that are supportive of transit service, thus Option 3 ranks the highest for density to support transit.

Integrating Land Uses

Objective 4.A.1.7 of the Region's OP is to "Reduce dependence on the automobile through the development of compact, mixed use, transit supportive, active transportation friendly urban environments." The OP recognizes that the mix and proximity of different land uses to each other have implications on overall travel demand and mode of travel. Generally, closer proximity between residential and non-residential land uses results in more short distance trips (for work, shopping, etc.). Shorter trip distances make the option to walk or cycle more attractive and viable. Thus, a community with a mix of land uses that provide options to live, work and play in close proximity could significantly reduce trip lengths and dependence on the automobile.

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The draft land use at this time does not provide details on the location of the proposed growth within each municipality. It is noted that Option 2 allocates a higher proportion of population and employment to Niagara Falls and Option 3 allocates a higher proportion to St. Catharines. Both options would have a higher potential to create compact, mixed-use communities compared to Option 1. Option 3, which has the higher intensification target of 50% compared to Option 2 at 40%, would have the highest potential for integrating land uses. Option 3 ranks the highest for integrating land uses.

Maximizing Existing Transportation Infrastructure

Existing transit service is provided by Niagara Region and four local area municipalities: Niagara Falls, St. Catharines, Welland and, to a limited extent, Pelham. Allocating population in areas that are already served by transit creates the opportunity for more people to choose transit as their travel mode. Higher transit demand in areas with existing service will improve the efficiency and viability of the transit services already being provided.

Additionally, the Region is pursuing the expansion of GO Rail service to Niagara. To maximize the potential for GO Rail ridership, a higher proportion of growth should be allocated to the municipalities along the railway corridor – Grimsby, Lincoln, St. Catharines and Niagara Falls – reduce travel distances for residents to access GO Rail.

Another measure of the utilization of existing infrastructure is the proportion of growth that will occur within the built boundary, on the assumption that expanding existing infrastructure, if required, is more efficient than building new infrastructure to support urban sprawl. Similarly, the provincial highway system, which includes QEW, Hwy 405, Hwy 406 and Hwy 420, provides high-capacity connections between the main centres within the Region as well as connection to external destinations such as the GTHA and United States. Allocating growth to areas that are more accessible to the major transportation corridors would facilitate goods movement and economic development. It is recognized that sections of the QEW corridor are constrained under existing conditions, but the NGTA study has identified the widening of the QEW corridor as part of the recommended solution.

At a broad level, all three options focus growth on the three main communities with transit service (St. Catharines, Niagara Falls and Welland) and Options 2 and 3 both allocate higher levels of growth to the municipalities along the rail corridor. However, Option 3 focuses more growth in St. Catharines, which offers the highest levels of existing transit service (based on the number of routes operated), and has the least expansion of the urban boundary (with 50% intensification target). Option 3 ranks the highest for maximizing existing transportation infrastructure.

SUMMARY

Growth options that increase land use density, integrate land uses and maximize existing infrastructure within the built boundary are more advantageous from a transportation perspective. Higher densities support transit; integrated land uses encourage shorter-distance trips and active modes of transportation; and allocating growth in areas with existing transportation infrastructure reduces the capital costs of building new transportation facilities.

At a high level, Option 3 has the highest potential measured against these criteria and is the preferred option. The allocation of growth at a finer level of detail (i.e. by subarea or traffic zone) within each of the municipalities will have implications on the growth option to fully address the criteria described above.